



## **REQUEST FOR PROPOSALS**

**21-0007**

For the Provision of

**2022 Roof Projects - Architectural/Engineering  
Consultant Services**

RFP Closing (Due Date & Time):  
**October 7, 2021 at 2:00 PM Pacific Time**

Issued by:  
**Beaverton School District 48  
16550 SW Merlo Road  
Beaverton, Oregon 97003  
September 10, 2021**

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## REQUEST FOR PROPOSAL

Solicitation No: RFP 21-0007

### **PURPOSE AND INTRODUCTION:**

This solicitation is for the purpose of retaining Architectural/Engineering Consultant Services with the selected consultant. The project summary is described below. The selected Consultant shall provide all labor, materials, plant, equipment, transportation and other facilities and services as necessary and/or required to execute all of work.

A **Non-Mandatory Pre-Proposal Conference** will be held on September 23, 2021 at:

12:00 PM	Findley 4155 NW Saltzman, Portland, OR 97229
1:30 PM	McKinley 1500 NW 185 <sup>th</sup> Avenue, Beaverton, OR 97006
3:00 PM	Nancy Ryles 10250 SW Cormorant Drive, Beaverton, OR 97006

The District expects any attendees of the Non-Mandatory Pre-Proposal Conference to adhere to responsible COVID-19 practices/guidelines (e.g., social distancing, etc.). For example, depending on how many attend and site logistics, the District may split the attendees into smaller groups.

Interested Proposers must submit a Proposal pursuant to the provisions of this Solicitation to via email only to: [contracts@beaverton.k12.or.us](mailto:contracts@beaverton.k12.or.us) **NOT LATER THAN:**

### **SOLICITATION DUE DATE AND TIME (CLOSING):**

**October 7, 2021 at 2:00 PM Pacific Time**

### **LATE PROPOSALS WILL NOT BE ACCEPTED.**

Prospective Proposers must register with Oregon Buys – <https://oregonbuys.gov/> to obtain the solicitation documents.

All questions and comments regarding this solicitation shall be directed **ONLY IN WRITING** by email to: [contracts@beaverton.k12.or.us](mailto:contracts@beaverton.k12.or.us)

This Solicitation is issued pursuant to ORS 279A, ORS 279C and the Oregon Attorney General Model Rules Division 48.

**PROPOSALS SHALL BE PURSUANT TO THE PROVISIONS OF THIS SOLICITATION.**

**THE DISTRICT MAY REJECT ANY PROPOSAL NOT IN COMPLIANCE WITH ALL PRESCRIBED REQUIREMENTS**

## SECTION I – PROJECT INTRODUCTION AND BACKGROUND

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### 1. DEFINITIONS:

The term "District" or "Owner" throughout this document means the Beaverton School District (BSD). The term "Consultant" means an Architect, Engineer, Photogrammetrist, Transportation Planner, Land Surveyor or provider of Related Services, or any combination of the foregoing. The term "Proposer" means the person or firm that submits a Proposal in response to this Solicitation. "Closing" is the solicitation due date and time. "Related services" means personal services, other than architectural, engineering, photogrammetric mapping, transportation planning or land surveying services, that are related to planning, designing, engineering or overseeing public improvement projects or components of public improvement projects, including but not limited to landscape architectural services, facilities planning services, energy planning services, space planning services, hazardous substances or hazardous waste or toxic substances testing services, cost estimating services, appraising services, material testing services, mechanical system balancing services, commissioning services, project management services, construction management services and owner's representation services or land-use planning services.

### 2. SOLICITATION REVIEW:

Proposers must carefully review this Solicitation document and are responsible for knowing and understanding all terms and conditions. Unless defects, ambiguities, omissions, or errors are brought to the District's attention by protest pursuant to SOLICITATION PROTEST AND REQUEST FOR CHANGE (Section III, Paragraph 3), protests or appeals based on such defects, ambiguities, omissions or errors received more than seven days after issuance of the Notice of Intent to Award may not be favorably considered.

### 3. BACKGROUND:

- a. The Beaverton School District encompasses approximately 57 square miles in northwestern Oregon in Washington County. Beaverton School District, located in the Portland, Oregon metro area, is the third largest School District in Oregon.
- b. The Beaverton School District has approximately 4,700 employees. The District is responsible for educating approximately 40,870 students in kindergarten through grade 12 at thirty-four (34) Elementary Schools, eight (8) Middle Schools, six (6) High Schools, five (5) Options Schools, and nineteen (19) Options Programs.

### 4. CONTRACT:

- A. The provisions of the sample AIA B101 (modified) – Architect Agreement are in addition to the requirements set forth in this solicitation document and are incorporated by reference (see Enclosures).
- B. Proposers are advised to thoroughly review and familiarize themselves with the standard contract. Certain contract terms reflect state statute and may not be altered.
  - 1) If a Proposer takes exception to any of these terms it is advised to protest such pursuant to paragraph 5 under the Public Contracting Rules Section of this Solicitation.
  - 2) At minimum, the proposal must reflect in writing, any exceptions to specific terms and conditions. The District may reduce the score of, or reject, a proposal with significant exceptions to terms and conditions.
- C. If the selected Consultant does not take either one of the two steps in "B" above, the Consultant will be expected to sign a contract including all standard terms and conditions contained in the sample contract.
- D. Personnel substitution – If the consultant must substitute personnel included in the original proposal they shall obtain written District approval of substituted personnel, prior to substitution.

### 5. AMENDMENTS:

The District may amend a Contract without additional competition pursuant to OAR 137-048-0320.

SECTION I – PROJECT INTRODUCTION AND BACKGROUND

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**6. DISTRICT REPRESENTATIVE:**

The District Representative for this project is Chris Hansen, Project Manager.

**7. SOLICITATION SCHEDULE:**

The milestones for the selection process are set forth below. The dates are specific and will be followed to the extent reasonably possible. The purpose of this schedule is for Proposer information only. Required dates for submittals and any other activities are provided elsewhere in this Request for Proposals. The District reserves the right to deviate from this schedule.

<u>Project Milestone</u>	<u>Completion Date</u>
Advertise Solicitation	September 9, 2021
Pre-Proposal Site Walk	September 23, 2021 at 12:00PM
Deadline for Questions	September 27, 2021 at 4:00PM
Final Addenda	October 4, 2021
Submit Proposals	October 7, 2021 at 2:00 PM
Proposal Evaluation Period	Week of October 13, 2021
Interviews (If Required)	October 18- 19, 2021
Notice of Intent to Award	October 20, 2021
Board Approval	October 26, 2021
Contract Award	on or about October 26, 2021

**8. CONTACT DURING SOLICITATION:**

Questions shall be submitted in writing via email to [contracts@beaverton.k12.or.us](mailto:contracts@beaverton.k12.or.us) as indicated on the Summary page of this Solicitation. No other contact regarding this solicitation during the solicitation process shall be permitted. Unauthorized contact regarding this solicitation may subject the offender’s proposal to rejection. Answers to questions not stated in writing and/or answered in the form of a written Addendum shall not be binding upon the District.

## SECTION II – STATEMENT OF WORK

Solicitation No: RFP 21-0007

- 1. PURPOSE AND INTRODUCTION.** The purpose of this Solicitation is to establish an Architectural Services Contract with the selected Consultant. The project summary is described below. The selected Consultant shall provide all labor, materials, equipment, transportation and other facilities and services as necessary and/or required to execute all of the Work
- 2. SERVICES REQUIRED.** Beaverton School District is requesting proposals for complete Architectural/Engineering Consultant Services for a project to reroof portions of 3 elementary school sites: McKinley, Findley and Nancy Ryles Elementary Schools. Construction is anticipated to occur in the Summer of 2022, and construction work shall be competitively bid under a Design / Bid / Build procurement method
- 3. PROJECT DESCRIPTION.**

This project includes three separate sites.

  - a. McKinley 1500 NW 185<sup>th</sup> Avenue, Beaverton, OR 97006: The existing built-up roofing on the building was installed in 1990 and is now failing. There is roughly 55,138 square feet of roofing to be removed and replaced or overlaid.
  - b. Findley 4155 NW Saltzman, Portland, OR 97229: The existing TPO roofing on the building is failing. There is roughly 43,231 square feet of roofing to be removed and replaced or overlaid. There is also approximately 28,820 square feet of asphalt roofing that needs to be replaced.
  - c. Nancy Ryles 10250 SW Cormorant Drive, Beaverton, OR 97006. There is roughly 24,891 square feet of built-up roofing to be removed and replaced or overlaid.
  - d. Each site will need to be evaluated by the design team and the district for the possible addition of a fall protection system.
  - e. It is preferable to install single ply roof (TPO or EPDM) solutions however other options may be considered.
  - f. Investigate or confirm recovering strategies recommended by independent roof consultant.
- 4. OPERATIONAL ATTRIBUTES:**

The district seeks to implement spaces with a focus on the following attributes:

  - a. Maintainability. The facilities must be implemented with significant consideration being given to ease of maintenance and effective maintenance cost management.
  - b. Efficient utilities systems using proven technologies.
- 5. DESCRIPTION OF SERVICES:**

Design services shall include Schematic Design, Design Development, and Construction Documents for permitting and bidding, bidding assistance, construction administration services, and warranty follow up for one year beyond substantial completion.

  - a. Design/Engineering
    - i. All designs shall be in compliance with Oregon Structural Specialty Code and Oregon Energy Code requirements, and any other applicable Building Code requirements.
    - ii. Consultant shall provide the necessary Design and Structural Engineering as required by the local Authority Having Jurisdiction (AHJ), for seismic anchorage of existing equipment, structural analysis of loading additions due to re-design and/or taper system or change in roofing materials, safety connection anchors, new parapet and/or blocking design anchorage, etc.
    - iii. Consultant shall provide the necessary Mechanical and Electrical engineering as required for any mechanical and electrical work to be included in the scope of work.
    - iv. Consultant shall provide a roofing consultant to review documents and provide feedback during design and review installed conditions. The roofing consultant shall investigate existing conditions including but not limited to review of owner provided survey, independent moisture and

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- composition of the roof and provide site by site recommendations. During construction the roof consultant is expected to review RFIs, attend a preconstruction meeting for each site and perform periodic inspections of each site.
- v. Consultant shall coordinate with the District provided asbestos consultant. The asbestos consultant will provide drawings and specifications to be inserted into the construction documents.
  - vi. Consultant shall be required to coordinate all designs with the district Energy & Resource Conservation Program Manager. There are incentives available for roofs with R-15 to R-30 or greater and for the sites with complete replacements we may also be able to earn SB 1149 money.
  - vii. A written specification manual shall be included as part of the 80% construction and bid documents. A draft of this document should be presented for review in Design Development. Cut sheets or recommend materials are sufficient for Schematic Design.
- b. Cost Estimating
- i. Consultant shall secure the services of a Cost Consultant to provide preliminary cost estimates at Schematic Design and Design Development phases.
- c. Bidding Services
- i. Participate in the pre-bid meeting(s) and site visits
  - ii. Review bid responses and respond to solicitation questions
  - iii. Prepare addendum documentation as needed
- d. Permitting Services:
- i. Provide necessary engineering services for permitting
  - ii. Review permit documents
  - iii. Prepare and submit Building Permit documents to the applicable Authorities Having Jurisdiction
  - iv. Facilitate the Building Permit process
  - v. Provide supplemental information required by plan review comments, if any
- e. Construction Services:
- i. Review submittals of proposed materials and equipment
  - ii. Invoice Review
  - iii. Submit documents for permit review and respond to comments as required by AJH
  - iv. Attend pre-construction meeting to align with regularly scheduled weekly OAC
  - v. Review contractor's shop drawings
  - vi. Answer contractor's questions
  - vii. Perform construction and final field observations and provide punch list and punch list support
  - viii. Prepare supplementary drawings as required for clarification
  - ix. Participate in 1-year warranty walks
- f. Meetings
- i. The consultant and applicable sub-consultants shall participate in a preliminary project kick-off meeting (assume 3) and design review presentations at completion of Design Development, and 80% Construction Document completion. Allow 3 hours minimum for each design review session.
  - ii. The consultant shall participate in a kick-off meeting and weekly meetings during the construction period assume mid-May through mid-September; punch list walkthrough and follow-up; and a one-year warranty.

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- g. Close-Out Assistance
  - i. The consultant shall review submitted operation and maintenance manuals, warranty and as built/redline drawings
  - ii. The consultant shall also prepare and submit record drawings developed from the contractor’s as-builts/redlines.
- h. Miscellaneous
  - i. The schedule and scope of work of this project may be a challenge due to constraints on overall project budget and available construction periods (summer break between school years).
  - ii. Value Engineering shall be used to ensure that optimized form and function are implemented for the budget available. VE efforts will conform to ASTM E1699-14, and not merely be a tool for cutting scope or quality
  - iii. Reasonable use of sustainable materials and construction processes are to be considered where reasonable without undue risk stemming from un-vetted products.
  - iv. The project will comply with the District’s Technical Standards and Education Specifications. Deviations may be proposed by the A/E with appropriate rationale for District consideration. The documents can be viewed in the Design Standards Program Documentation located at: <https://www.beaverton.k12.or.us/departments/facilities-development/technical-standards>
  - v. The District has implemented the eBuilder Project Management software platform, for coordination of efforts, approvals, and expedited communication. All prime project team members will be required to utilize the program. Consultant shall be provided a seat (license) and training.
  - vi. All persons involved in the project who will have a physical presence on site at any time during the course of the project will need to clear a background check. The basic criteria of clearance and refusal offenses will be provided by the District Project Representative. Consultants and sub-consultants shall provide a report of who has cleared the background check by an approved agency. Consultants and/or sub-consultants are also responsible to print and wear their own badges that align with the district standard as provided by the District Project Representative.

**6. PROJECT SCHEDULE:**

<u>Project Milestone</u>	<u>Completion Date</u>
Schematic Design Due	November 30, 2021
Design Development Due	January 5, 2022
Design Development Review Meeting	on or about January 12, 2022
80% Construction Documents Due	February 4, 2022
80% Construction Document Review	on or about February 14, 2022
Bid Docs Due	February 28, 2022
Contractor Bids Due	March 22, 2022
Board Approval	April 4, 2022
Estimated Construction Start	June 22, 2022
Completion Date	August 2022

**7. ADDITIONAL REQUIREMENTS:**

- a. **E-Builder.** See sample Contract attached to this Solicitation.
- b. **Background Checks.** See sample Contract attached to this Solicitation.
- c. **BIM.** See sample Contract attached to this Solicitation.

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8. **BUSINESS EQUITY.** The Proposer understands that the District maintains a goal of engaging Disadvantaged, Minority, Women, Emerging Small and Service Disabled Veteran owned business enterprises (D/M/W/ESB/SDV) as service providers in delivering services necessary to implement our bond program. The District aspires to a goal of ten (10) percent D/M/W/ESB/SDV content, by contract value, in completing our capital bond work, and the Consultant shall expend reasonable efforts to reach this goal in the total value of their contracts with the District.

Additionally, the District will continue to partner with its Consultants to provide career learning opportunities for students, providing them exposure to various potential career paths, including, but not limited to, architecture, engineering and related services, legal and accounting services through programmatic involvement with the District's Career Pathways Program and Career Related Learning Experiences.



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**1. SELECTION PROCEDURE:**

In accordance with the District's Estimated Fee, the District shall use the informal selection procedure to select a Consultant. Should the District find it in its interest to do so, the District may use the Formal Selection Procedure to award a Contract under this solicitation.

**2. PRE-PROPOSAL CONFERENCE:**

- a. Purpose. The pre-proposal conference, if held, is conducted with Proposers to explain and discuss the Solicitation requirements.
- b. Required Attendance. If the District pre-proposal conference is mandatory (as indicated on the Summary Page), a proposal submitted by a Proposer who did not attend the mandatory pre-proposal conference would be rejected.
- c. Statements Not Binding. Statements made by the District's representative at the pre-proposal conference do not change the Solicitation Document unless the District confirms such statements with a Written Addendum.

**3. SOLICITATION PROTEST AND REQUEST FOR CHANGE:**

Proposers may submit a written protest of anything contained in this Solicitation and may request a change to any provision, specification or Contract term contained in the Solicitation, no later than seven (7) calendar days prior to the date Proposals are due. Each protest and request for change must include the reasons for the protest or request, and any proposed changes to the Solicitation provisions, specifications or Contract terms. The District will not consider any protest or request for change that is submitted after the submission deadline. Protest shall be delivered to the Purchasing Manager by email (contracts@beaverton.k12.or.us). Any changes to the Solicitation will be made and issued via an Addendum pursuant to Paragraph 6 in this section.

**4. AWARD SELECTION PROTEST:**

Proposers may Protest Consultant Selection.

- a. Single Award. In the event of an award to a single Consultant, the District shall provide to all Proposers a copy of the selection notice that the District sent to the highest scoring Proposer. A Proposer who claims to have been adversely affected or aggrieved by the selection of the highest scoring Proposer may submit a written protest of the selection to the District no later than seven (7) calendar days after the date of the Notice of Intent to Award a Contract. Only a Proposer who is in a position to be awarded a contract if their Protest is successful may submit a Protest. A Proposer submitting a protest must demonstrate that the protesting Proposer is the highest scoring Proposer because the Proposal of the highest scoring Proposer failed to meet the requirements of the Solicitation or because the highest scoring Proposer is not qualified to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services or Related Services described in the Solicitation.
- b. Multiple Award. In the event of an award to more than one Consultant, the District shall provide to all Proposers copies of the selection notices that the District sent to the highest scoring Proposers. A Proposer who claims to have been adversely affected or aggrieved by the selection of the highest scoring Proposers may submit a written protest of the selection to the District no later than 12:00 noon seven (7) calendar days after the date of the selection notices. A Proposer submitting a protest must claim that the protesting Proposer is one of the highest scoring Proposers because the Proposals of all higher scoring Proposers failed to meet the requirements of the Solicitation, or because a sufficient

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number of Proposals of higher scoring Proposers failed to meet the requirements of the Solicitation. In the alternative, a Proposer submitting a protest must claim that the Proposals of all higher scoring Proposers, or a sufficient number of higher scoring Proposers are not qualified to perform the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services or Related Services described in the Solicitation.

- c. Effect of Protest Submission Deadline. The District will not consider any protest that is submitted after the submission deadline.
- d. Resolution of Protests. The Purchasing Manager shall resolve all timely submitted protests within a reasonable time following the District's receipt of the protest and once resolved, shall promptly issue a written decision on the protest to the Proposer who submitted the protest. If the protest results in a change to the Solicitation, the District shall revise the Solicitation accordingly and shall issue an addendum in accordance with these rules. If the protest results in a change that effects the Solicitation beyond the ability to issue an addendum to correct the issues raised in the protest, the District may cancel the Solicitation and re-advertise after correction of the issue(s).

### 5. SOLICITATION CANCELLATION:

The District may cancel, delay or suspend a solicitation, or reject all Proposals, if the District believes it is in the public interest to do so. In the event of any such cancellation, delay, suspension or rejection, the District is not liable to any Proposer for any loss or expense caused by or resulting from any such cancellation, delay, suspension or rejection. Proposers responding to solicitations are responsible for all costs they may incur in connection with submitting Proposals.

### 6. ADDENDA:

- a. Issuance; Receipt. The District may change this Solicitation only by Written Addenda. A Proposer must provide written acknowledgement of receipt of all issued Addenda in the space provided on the Proposer Certification Form (Attachment A).
- b. Notice and Distribution. The District will post any and all Addenda via the ORPIN website.
- c. It is the Proposers' responsibility to inquire about Addenda; Proposers should frequently check the Oregon Buys website until the Solicitation Closing (due date and time) about any Addenda issued.
- d. Timelines; Extensions. The District shall issue Addenda within a reasonable time to allow prospective Proposers to consider the Addenda in preparing their Proposal. The District may extend the Closing if the District determines prospective Proposers need additional time to review and respond to Addenda.

### 7. ADDITIONAL REQUIREMENTS:

- a. The District reserves the right to seek clarifications of submitted Proposals, which may or may not affect the evaluation scoring;
- b. The District reserves the right to negotiate a final Contract that is in the best interest of the District;
- c. The District reserves the right to reject any or all Proposals and the right to cancel the Solicitation at any time if doing either would be in the public interest as determined by the District;
- d. Proposers responding to this Solicitation do so solely at their expense, and the District is not responsible for any Proposer expenses associated with the Solicitation;
- e. Failure of the District to insist on strict performance shall not constitute a waiver of any of the provisions of this Solicitation or resulting Contract or waiver of any other default of the Proposer.

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### 8. RECEIPT, OPENING, AND RECORDING OF PROPOSALS:

- a. The District shall electronically open each Proposal upon receipt. The District shall not be responsible for a Proposal that is not properly addressed and/or identified.

### 9. TIES AMONG PROPOSERS:

- a. If the District is selecting a Consultant on the basis of qualifications alone and determines after the scoring of Proposers that two or more Proposers are equally qualified, the District may select a candidate through any process that the District believes will result in the best value for the District taking into account the scope, complexity and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services. Provided, however, the tie breaking process established by the District under this section cannot be based on the Proposer's pricing policies, pricing proposals or other pricing information, including the number of hours proposed for the services required, expenses, hourly rates and overhead. The process must be designed to instill public confidence through ethical and fair dealing, honesty and good faith on the part of the District and Proposers and shall protect the integrity of the Public Contracting process. Once a tie is broken, the District and the selected Proposer shall proceed with negotiations under OAR 137-048-0210(5) or 137-048-0220(4)(d), as applicable.
- b. If the District is selecting a Consultant on the basis of price alone, or on the basis of price and qualifications, and determines after the ranking of Proposers that two or more Proposers are identical in terms of price or are identical in terms of price and qualifications, then the District shall follow the procedure set forth in OAR 137-046-0300, (Preferences for Oregon Goods and Services), to select the Consultant.

### 10. NOTICE OF INTENT TO AWARD:

The District shall provide a written Notice of Intent to Award (NOI) to all Proposers at least SEVEN (7) calendar days before the Award of a Contract, unless the District determines that circumstances require prompt execution of the Contract. The District's Award must not be final until the latter of the following: The District determines that the contract must be executed as quickly as possible, SEVEN (7) calendar days after the date of the NOI, or until the District provides written response to all timely filed protests denying the protest(s) and affirming the Award.

### 11. CONFIDENTIALITY OF PROPOSALS:

- a. **REDACTION FOR PUBLIC RECORDS:** Any portion of a Proposal that the Proposer claims as exempt from disclosure must meet the requirements of ORS 192.501(2), ORS 192.502(4) and/or ORS 646.461 et seq. **Proposers are required to submit a redacted copy of their Proposal and all attachments if redactions are being requested.** "Redaction" means the careful editing of a document to obscure confidential references; a revised or edited document thereby obscuring the exempt information but otherwise leaving the formatted document fully intact. **The redacted copy must be a complete copy of the submitted Proposal, in which all information the Proposer deems to be exempt from public disclosure has been identified.**
- b. When preparing a redaction of your Proposal submission, a Proposer must plainly mark the redactions by obscuring the specific areas your firm asserts are exempt from public disclosure. In addition, a summary page identifying the pages where redactions occur shall be included with the Proposal submission (summary is not included in page limitations). **If a Proposer fails to submit a redacted copy of their Proposal as required, the District may release the Proposer's original Proposal without redaction.** If the entire proposal is marked as constituting a "trade secret" or being "confidential", at the District's sole discretion, such a Proposal may be rejected as non-responsive.

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- c. Unless expressly provided otherwise in this RFP or in a separate written communication, the District does not agree to withhold from public disclosure any information submitted in confidence by a Proposer unless the information is otherwise exempt under Oregon law. The District agrees not to disclose Proposals until the District has completed its evaluation of all Proposals and publicly announces the results.

## SECTION IV – RESPONSE AND EVALUATION

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### 1. INTRODUCTION:

This section prescribes the mandatory format for the presentation of a Proposal in response to this Solicitation. The purpose of this format is to ensure uniformity of the information from each Proposer and to aid in clear understanding and evaluation of each Proposal. Failure to submit Proposals in accordance with the provisions of this Section may be grounds to declare the Proposal non-responsive. Failure to provide any information requested in this Solicitation may result in rejection of the Proposal.

### 2. PROPOSAL SUBMISSION: A Consultant's submitted Proposal:

- i. Shall include an electronic copy of the Proposal in editable PDF or MS WORD format.

### 3. DETAILED PROPOSAL CONTENT REQUIREMENTS:

Consultants must provide a reply to each of the following items. The Proposer Certification form (see attachments) shall be completed and submitted as the cover of the Proposer's response. Provide a brief but concise response to each of the following criteria areas. Do not assume the District has any prior knowledge of the Proposer. Proposal response must be in the same order as presented below:

#### A. APPROACH

1. Describe the Proposers' knowledge and understanding of the Project and Services described in the Statement of Work Section;
2. Define the Proposers' approaches to staffing and scheduling needs for the services;
3. Define proposed solutions to any perceived design and constructability issues;
4. Describe the design philosophy, if applicable, and approach to the services described in the Statement of Work Section;

#### B. EXPERIENCE

1. Describe the Proposers' availability and capability to perform the required services outlined in the Statement of Work Section
2. Describe Proposers' and their sub-consultants demonstrated ability to successfully complete similar services on time and within budget, including whether or not there is a record of satisfactory performance under OAR 137-048-0120 (2) (the District's or other public agency record of Consultants performance);
3. Describe Proposers' Performance history in meeting:
  - a. Deadlines.
  - b. AHJ building department permit and deferred submittal performance.
  - c. Accuracy of cost estimates.
  - d. Producing high quality work.
  - e. Meeting financial obligations.
  - f. Provide the status of any required license or certification.

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### C. PERSONNEL

1. List the Proposers' key staff to be assigned to the project and describe their experience in providing similar services on comparable projects;
2. Describe the amount and type of resources, and list the number of experienced staff persons Proposer has available to perform the services described in Section II of this document, Statement of Work;
3. Show the recent, current and projected workloads of the staff and resources referenced above to be assigned to the project;
4. List the proportion of time Proposer estimates that the staff referenced above to be assigned to the project, would spend on the services described in Section II of this document, Statement of Work;

### D. SUB-CONSULTANTS

1. List the sub-consultant(s) that would be retained, and their roles with the project, experience of key staff, amount and type of resources, availability, current workload, and proportion of time of key staff related to the services described in the Section II of this document, Statement of Work;
2. List the sub-consultant(s) key staff assigned to the project, their experience, amount and type of resources, availability, current workload, and proportion of time of key staff assigned to the project related to the services described in Section II of this document, Statement of Work;
3. Describe the sub-consultant(s) demonstrated ability to successfully complete similar services on time and within budget, including whether or not there is a record of satisfactory performance under OAR 137-048-0120 (2) (the Districts' or other public agency record of Consultants performance);
4. Describe sub-consultants': Performance history in meeting deadlines; City of Beaverton building department permit and deferred submittal performance; Accuracy of cost estimates; Producing high quality work; and Meeting financial obligations;

### E. OTHER

1. Provide any other criteria that would be relevant to the services described in the Solicitation including, where the nature and budget of the project so warrant, a design competition between competing Proposers.
2. Provide a list of any litigation, arbitration, or mediation (pending or settled) the firm has been involved in within the last five years in excess of \$10,000. Show the parties, project, amount of dispute, and results.

### F. REFERENCES

1. Provide a minimum of three references (agency name, contact name, phone, email, brief description of the project) and written recommendations from past clients.

## 4. FEE PROPOSAL:

1. In a separate and appropriately named file (including "FEE", the Proposer's name, and solicitation number as shown on the Request for Proposal) the Proposer shall provide a complete and itemized fee for the services described in Section II of this document, Statement of Work. In addition, provide an hourly cost (including burden and mark up) for key personnel and principals for the prime firm and sub-consultants. If a Proposer fails to provide the pricing information in a separate envelope, the Purchasing Manager, or designee, shall separate the pricing information from the other documents and secure it separately in the Procurement folder.

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2. If the proposal is successful, the contract will be award for the value presented in this section. There will be no further negotiations unless the scope of work or schedule are adjusted.
3. Note that reimbursables are to be direct reimbursable and no mark-up is allowed. Additionally, the Beaverton School District is governmental entity and therefore cannot be charged the Commercial Activities Tax.

### 5. INTERVIEWS

1. The evaluation committee may elect to interview Proposers if the evaluation committee considers it necessary or desirable. The top ranked firm, or up to three firms if the scoring is very close, may be invited to interview. The interview process may be used to supplement and clarify the information contained in the proposal.

## SECTION IV – RESPONSE AND EVALUATION

Solicitation No: RFP 21-0007

### **PROPOSAL EVALUATION:**

The District shall establish a committee of at least three individuals, including at least one District employee, to review, score and rank Proposals according to the evaluation criteria set forth in the Solicitation. Purchasing Department staff will manage the RFP process, and consult with evaluation committee members as needed, but shall not be scoring members of the committee.

After scoring and ranking the proposals based on the qualification criteria listed below, the committee will select up to three of the highest-scoring proposals as being qualified to provide the Services. The District will post the results of the qualification scores and respective proposal scores on Oregon Buys. The Purchasing Department will then either 1) provide the committee with the pricing proposals or 2) advise the committee to proceed with the Formal Evaluation Process pursuant to OAR 137-048-0220. In the event of the latter, and should the committee decide not to cancel the Solicitation, the committee will enter into contract negotiations with the highest scoring proposer.

### **EVALUATION CRITERIA:**

The District will score each proposal by reviewing the evaluation criteria.

#### **A. APPROACH**

- 1) Proposers' knowledge and understanding of the Project and Services.
- 2) Proposers' approach to staffing and scheduling needs for the services.
- 3) Proposed solutions to any perceived design and constructability issues.
- 4) Design philosophy, if applicable, and approach to the services.

#### **B. EXPERIENCE**

- 1) Proposers' availability and capability to perform the required services.
- 2) Proposers' demonstrated ability to successfully complete similar services on time and within budget, including whether or not there is a record of satisfactory performance under OAR 137-048-0120 (2) (the Districts' or other public agency record of Consultants performance);
- 3) Proposers': Performance history in meeting deadlines; Washington County and City of Beaverton building department permit and deferred submittal performance; Accuracy of cost estimates; Producing high quality work; and Meeting financial obligations.
- 4) Status of any required license or certification.

#### **C. PERSONNEL**

- 1) Proposers' key staff assigned to the project and their experience in providing similar services on comparable projects.
- 2) The amount and type of resources, the number of experienced staff persons Proposer has available to perform the services.
- 3) The recent, current and projected workloads of the staff and resources referenced above to be assigned to the project.
- 4) The proportion of time Proposer estimates that the staff referenced above to be assigned to the project.

#### **D. SUB-CONSULTANTS**

- 1) The sub-consultant(s) that would be retained and their roles with the project related to the services.
- 2) List the sub-consultant(s) key staff assigned to the project, their experience, amount and type of resources, availability, current workload, and proportion of time of key staff assigned to the project.



SECTION IV – RESPONSE AND EVALUATION

Solicitation No: RFP 21-0007

- 3) The sub-consultant(s) demonstrated ability to successfully complete similar services on time and within budget, including whether or not there is a record of satisfactory performance under OAR 137-048-0120 (2) (the Districts or other public agency record of Consultants performance).
- 4) Sub-consultants': Performance history in meeting deadlines; Washington County and City of Beaverton building department permit and deferred submittal performance; Accuracy of cost estimates; Producing high quality work; and Meeting financial obligations.

E. OTHER

- 1) Any other criteria that is relevant to the services described in the Solicitation including, where the nature and budget of the project so warrant, a design competition between competing Proposers.
- 2) Provide a list of any litigation, arbitration, or mediation (pending or settled) the firm has been involved in the last five years in excess of \$10,000. Show the parties, project, amount of dispute, and results.

F. REFERENCES

- 1) References (agency name, contact name, phone, email, brief description of the project) and written recommendations from past clients – minimum of three. Data obtained from provided references and any other reference check performed by the evaluation committee will bear on the Proposers' ranking.

G. FEE

- 1) Once proposals have been scored on Criteria A-F, if the proposal has been found to be qualified, scoring a minimum of 80% or more of the available points for the written proposal, the Fee proposal will be evaluated. Those who do not earn the minimum score are disqualified. Fee proposal (points to be assigned on a ratio method in which the lowest cost receives the maximum points allowed, and all other proposals receive a percentage of the points available based on their cost relationship to the lowest). This score is added to proposal's score from the previous section and a final score is determined.

<b>CONTENT REQUIREMENT</b>	<b>Maximum Points</b>
Approach	25
Experience	25
Personnel	15
Sub-Consultants	15
Other	5
References	Pass/Fail
Fee	15
<b>Total Points (written proposal)</b>	<b>100</b>
<b>Interviews (if conducted)</b>	<b>30</b>
<b>Total Points</b>	<b>130</b>

**INTERVIEWS:**

- A. The evaluation committee may elect to interview Proposers if the evaluation committee considers it necessary or desirable. The highest scoring firm, or up to three firms if the scoring is very close, may be invited to interview. The interview process will be used to supplement and clarify the information contained in the proposal.
- B. Interviews, if conducted, will be scored by the Evaluation Committee in the same manner as the written proposal and will bear on the firms' overall score in the selection process.
- C. If the evaluation committee elects to utilize interviews an additional 30 points will be available to each firm to earn.

## SECTION IV – RESPONSE AND EVALUATION

Solicitation No: RFP 21-0007

- D. Based upon the proposal scoring, as modified by the interview, and the results of reference checks, the firms will be given final score by the evaluation committee. The final score and a recommendation to award a contract will be provided to District Administration for a final decision to award a contract.
- E. Particular details about interviews will be issued to those firms invited. Such interviews/presentations will be at the firm's expense.

### **REFERENCES:**

The evaluation committee may elect to check references if the evaluation committee considers it necessary or desirable.

### **SELECTION AND NEGOTIATION:**

If the District does not cancel the Solicitation after it receives either the qualification criteria scores or the final scores for each Proposer, the District will begin negotiating a Contract with the highest scored Proposer. If, after opening Fee proposals, the District decides to proceed with a formal selection procedure, the fee schedule will be the subject of negotiations. Otherwise, or additionally, depending on circumstances, the District shall direct negotiations toward obtaining written agreement on:

- a. The Proposer's performance obligations and performance schedule;
- b. Payment methodology and a maximum amount payable to the Proposer for the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services or Related Services required under the Contract that is fair and reasonable to the District as determined solely by the District, taking into account the value, scope, complexity and nature of the Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services or Related Services; and
- c. Any other provisions the District believes to be in the District's best interest to negotiate.

The District shall, either orally or in writing, formally terminate negotiations with the highest scored Proposer if the District and Proposer are unable for any reason to reach agreement on a Contract within a reasonable amount of time. The District may thereafter negotiate with the second highest scored Proposer, and if necessary, with the third highest scored Proposer, and so on, until negotiations result in a Contract. If negotiations with any Proposer do not result in a Contract within a reasonable amount of time, the District may end the particular solicitation. Nothing in this rule precludes the District from proceeding with a new solicitation for the same Services described in this Solicitation that failed to result in a Contract.

### **TIES AMONG CONSULTANTS:**

If the District is selecting a Consultant on the basis of qualifications alone and determines after the ranking of Consultants that two or more Consultants are equally qualified, the District may select a candidate through any process that the District believes will result in the best value for the District taking into account the scope, complexity and nature of the Architectural, Engineering and Land Surveying Services. The process shall instill public confidence through ethical and fair dealing, honesty and good faith on the part of the District and Consultants and shall protect the integrity of the Public Contracting process. Once a tie is broken, the District and the selected Consultant shall proceed with negotiations under OAR 137-048-0210(3) or 137-048-0220(4)(c), as applicable.

If the District is selecting a Consultant on the basis of price alone, or on the basis of price and qualifications, and determines after the scoring of Consultants that two or more Consultants are identical in terms of price or are identical in terms of price and qualifications, then the District shall follow the procedure set forth in OAR 137-046-0300, (Preferences for Oregon Goods and Services), to select the Consultant.

## PROPOSAL SUBMISSION CHECKLIST

**ALL CERTIFICATIONS, FORMS AND PROPOSAL CONTENT REQUIREMENTS AS SPECIFIED IN SECTION IV  
MUST BE INCLUDED IN PROPOSALS.**

### \_\_\_\_ **REQUIRED AFFIDAVIT, CERTIFICATIONS AND FORMS**

The following completed certifications and forms must be signed by the person authorized to represent the Proposer regarding all matters related to the Proposal and authorized to bind the Proposer to the agreement. Failure to submit any of the required, completed and signed certifications/forms shall result in disqualification of the proposing firm.

- \_\_\_\_ PROPOSER CERTIFICATION - This serves as the cover sheet for your Proposal. (Attachment A)
- \_\_\_\_ AFFIDAVIT OF NON-COLLUSION / COMPLIANCE WITH TAX LAWS. (Attachment B)
- \_\_\_\_ NON-CONFLICT OF INTEREST CERTIFICATION. (Attachment C)
- \_\_\_\_ PROPOSER RESPONSIBILITY FORM – All Pages. (Attachment D)
- \_\_\_\_ PROPOSER REFERENCE FORMS – Include the # specified on the form. See SECTION IV. (Attachment E)

### \_\_\_\_ **RESPONSES TO DETAILED PROPOSAL CONTENT REQUIREMENTS**

Detailed Proposal Content Requirements are specified in SECTION IV.

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The following attachment(s) are **NOT** to be returned with the Proposal. The content of these attachment(s) must be reviewed by the Proposer. The terms and conditions will apply to the Contract to be executed for the work.

ATTACHMENT F          Sample AIA B101 Contract

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This checklist is provided for the Proposer’s convenience in assembling your proposal and is NOT required to be returned with the proposal.

SECTION V – ATTACHMENTS  
ATTACHMENT A  
Solicitation No: RFP 21-0007

**PROPOSER CERTIFICATION**

Respectfully submitted this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.



Signature: \_\_\_\_\_

Name: \_\_\_\_\_  
(Please type or print)

Phone: \_\_\_\_\_

Title: \_\_\_\_\_

Email Address: \_\_\_\_\_

Firm/Company Name: \_\_\_\_\_

Physical Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

1. The Proposer certifies that he or she has read and understands all terms and conditions of this solicitation.
2. The Proposer acknowledges that the person that signs this Certification is fully authorized to sign on behalf of the Proposer listed and to fully bind the Proposer to all conditions and provisions thereof.
3. The Proposer certifies that Proposer has complied or will comply with all requirements of local, state, and national laws, and that no legal requirement has been or will be violated in making or accepting this RFP.
4. The Proposer holds a certificate from the Oregon State Board of Architect Examiners, the Oregon State Landscape Architect Board, or the Oregon State Board of Examiners for Engineering and Land Surveying as applicable:  
Registration #: \_\_\_\_\_.
5. The Proposer, pursuant to ORS 279A.120 (1), (check one) is \_\_\_\_\_/is not \_\_\_\_\_ a resident Bidder.  
If not, indicate State of residency \_\_\_\_\_.
6. The Proposer certifies that it has not discriminated and will not discriminate, in violation of ORS 279A.110, against any disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business that is certified under ORS 200.055 in obtaining any required subcontract.
7. The Proposer agrees to comply with Oregon tax laws in accordance with ORS 305.385.
8. The Proposer acknowledges receipt of the following addenda: (list by number and date appearing on addenda.)

Addendum Number	Date	Addendum Number	Date
_____	_____	_____	_____
_____	_____	_____	_____

SECTION V – ATTACHMENTS  
ATTACHMENT B  
Solicitation No: RFP 21-0007

**AFFIDAVIT OF NON-COLLUSION / COMPLIANCE WITH TAX LAWS**

Proposer: \_\_\_\_\_

I state that:

- (1) The correct taxpayer identification numbers are:  
A. Federal Employer ID Number (EIN): \_\_\_\_\_ B. Employer's Oregon ID Number: \_\_\_\_\_
- (2) Proposer is not subject to backup withholding because (i) Proposer is exempt from backup withholding, (ii) Proposer has not been notified by the IRS that Proposer is subject to backup withholding as a result of a failure to report all interest or dividends, or (iii) the IRS has notified Proposer that Proposer is no longer subject to backup withholding;
- (3) The price(s) and amount of this proposal shall be arrived at independently and without consultation, communication or agreement with any other consultant, proposer or potential proposer, except as disclosed on the attached appendix.
- (4) That neither the price(s) nor the amount of this proposal, and neither the approximate price(s) nor approximate amount of this proposal, shall be disclosed to any other firm or person who is a proposer or potential proposer, and they will not be disclosed before Contract award.
- (5) No attempt has been made or will be made to induce any firm or person to refrain from proposing on this contract, or to submit any noncompetitive proposal or other complementary proposal.
- (6) The proposal of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.
- (7) \_\_\_\_\_ (name of firm), its affiliates, subsidiaries, officers, directors and employees are not currently under investigation by any governmental agency and have not in the last four years been convicted of or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to proposing on any public contract, except as described in the attached appendix.

I state that \_\_\_\_\_ (name of firm) understands and acknowledges that the above representations are material and important, and will be relied on by the Beaverton School District in awarding the contract(s) for which this proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is and shall be treated as fraudulent concealment from the Beaverton School District of the true facts relating to the submission of proposals for this contract. I am authorized to act on behalf of Proposer, and have authority and knowledge regarding Proposer's payment of taxes, and to the best of my knowledge, Proposer is not in violation of any Oregon tax laws, including, without limitation, those tax laws listed in ORS 305.380(4); the elderly rental assistance program under ORS 310.630 to 310.706; and any local taxes administered by the Oregon Department of Revenue under ORS 305.620.



\_\_\_\_\_

(Affiant's Signature)

STATE OF OREGON

County of \_\_\_\_\_

Signed and sworn to before me on \_\_\_\_\_ (date) by \_\_\_\_\_ (Affiant's name)

Notary: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

**NON-CONFLICT OF INTEREST CERTIFICATION**

**Issuing Agency:** Beaverton School District

I, \_\_\_\_\_ hereby certify I have read the statement defining conflict of interest as quoted below; that I understand the statement; that no conflict of interest exists as therein defined, which precludes an impartial Bid/Proposal to be submitted by myself or the entity/company for which the Bid/Proposal is submitted, and that if such a conflict should arise, I will immediately notify the Beaverton School District and disqualify my Bid/Proposal.

**"NO OFFICER, EMPLOYEE, OR AGENT OF THE BIDDER/PROPOSER HAS ANY PERSONAL FINANCIAL INTEREST, DIRECT OR INDIRECT, IN THE OPERATION OF THE BEAVERTON SCHOOL DISTRICT OR WITH ANY PARTY CONNECTED WITH THE OREGON SCHOOL AND DISTRICT IMPROVEMENT NETWORK, DIRECTLY OR INDIRECTLY."**

 Signature: \_\_\_\_\_

Name: \_\_\_\_\_  
(Please type or print)

Title: \_\_\_\_\_

Firm/Company Name: \_\_\_\_\_  
(Please type or print)

Date: \_\_\_\_\_

**PROPOSER RESPONSIBILITY FORM  
(CONTRACTOR’S QUALIFICATIONS AND FINANCIAL INFORMATION)**

**DECLARATION AND SIGNATURES**

The undersigned hereby declares that the he or she is duly authorized to complete and submit this Proposer Responsibility Form and that the statements contained herein are true and correct as of the date set forth below. Incomplete, incorrect or misleading information will be reason for a determination by the District of Proposer non-responsibility.

Date: \_\_\_\_\_

 Signature: \_\_\_\_\_

Name: \_\_\_\_\_  
(Please type or print)

Title: \_\_\_\_\_  
(Please type or print)

Firm/Company: \_\_\_\_\_  
(Please type or print)

**Instructions**

- 1. The information provided in this form is part of the District inquiry concerning proposer responsibility. Please print clearly or type.**
- 2. If you need more space, use plain paper. Submit completed form with proposal response.**
- 3. Answer all questions. Submission of a form with unanswered questions, incomplete or illegible answers may result in a finding that the Proposer is not a responsible Proposer.**

**SECTION I –RELIABILITY**

Has your company ever been declared in breach of any contract for unperformed or defective work?

Yes: \_\_\_ No: \_\_\_

If “yes”, explain:

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Has any employee or agent of your company ever been convicted of a criminal offense arising out of obtaining, attempting to obtain, or performing a public or private contract or subcontract?

Yes: \_\_\_ No: \_\_\_

If “yes”, explain:

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Has any employee or agent of your company been convicted under state or federal law of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property or any other offense indicating a lack of business integrity or business honesty?

Yes: \_\_\_ No: \_\_\_

If “yes”, explain:

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Has your company or any employee or agent of your company been convicted under state or federal antitrust laws?

Yes: \_\_\_ No: \_\_\_

If “yes”, explain:

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Has any Officer or Partner of your organization ever been an Officer or Partner of another organization that failed to complete a contract?

Yes: \_\_\_ No: \_\_\_

If “yes”, explain:

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**SECTION II – FINANCIAL  
RESOURCES**

Has your firm ever been at any time in the last ten years the debtor in a bankruptcy case? Yes:  No:

If “yes”, explain:

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Does your firm have any outstanding judgments pending against it? Yes:  No:

If “yes”, explain:

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In the past ten years, has your firm been a party to litigation, arbitration or mediation where the amount in dispute exceeded \$10,000? Yes:  No:

If “yes”, explain:

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In the past ten years, has your firm been a party to litigation, arbitration or mediation on a matter related to work performance on a contract? Check “yes” even if the matter proceeded to arbitration or mediation without court litigation. Yes:  No:

If “yes”, explain (include court, case number, and party names):

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Have you or any of your affiliates discontinued business operation with outstanding debts? Yes:  No:

If “yes”, explain:

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SECTION V – ATTACHMENTS  
ATTACHMENT D  
Solicitation No: RFP 21-0007

**SECTION III – KEY PERSONNEL**

List the principal individuals of your company, their current job title, the total years of experience they have in the industry and their current primary responsibility for your company. Corporations list current officers and those who own 5% or more of the corporation’s stock. Limited liability companies list members who own 5% or more of the company. Partnerships list all partners. Joint ventures list each firm that is a member of the joint venture and the percentage of ownership the firm has in the joint venture.

ITEM	Principal Individual
A. Name	
B. Position	
C. Years in Position	
D. Current Primary Responsibility	
ITEM	Principal Individual
A. Name	
B. Position	
C. Years in Position	
D. Current Primary Responsibility	
ITEM	Principal Individual
A. Name	
B. Position	
C. Years in Position	
D. Current Primary Responsibility	
ITEM	Principal Individual
A. Name	
B. Position	
C. Years in Position	
D. Current Primary Responsibility	

Person who will be in direct charge of work if your company is awarded this Contract:

ITEM	PERSON IN DIRECT CHARGE
A. Name	
B. Position	
C. Years in Position	
D. Largest Project Supervised - \$	
E. Largest number of employees ever supervised	

## PROPOSER REFERENCE FORM

PROPOSER REFERENCE FORM FOR \_\_\_\_\_  
(Insert Name of Proposer)

***Proposer shall provide three (3) references and shall use a separate copy of this form for each reference.***

Date(s) Work Performed: \_\_\_\_\_

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

Name(s) of Project(s): \_\_\_\_\_

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

Value of Project(s): \$ \_\_\_\_\_

Name of Company: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Contact Name: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Method: Subjective Evaluation

Each reference may be checked for, but not limited to, adherence to contract terms and conditions, timelines, quality standards, overall customer service, project being of similar size, scope and complexity.