

**THE SCHOOL DISTRICT OF PHILADELPHIA
OFFICE OF CAPITAL PROGRAMS
440 NORTH BROAD STREET, 3RD FLOOR
PHILADELPHIA, PENNSYLVANIA 19130-4015
TELEPHONE (215) 400-4730 / FAX (215) 400-4731**



**Request for Proposal
To Provide Professional Design Services
For
Major Renovation at
Albert Greenfield Elementary School**

1.0 Subject

The School District of Philadelphia's Office of Capital Programs is requesting proposals from qualified firms to provide professional design services for the Major Renovation at the Albert Greenfield Elementary School. The Albert Greenfield Elementary School is located in Center City and has an enrollment of approximately 580 students servicing students in grades K through 8. The project consists of a complete replacement of the existing central heating plant and terminal equipment as well as elevator and fire alarm replacement. Additionally a new gas service will be installed. The recently installed air cooled chiller will remain.

The School District of Philadelphia (SDP) was designated a distressed school district on December 21, 2001 pursuant to the Pennsylvania Public School Code ("PSC"), 24 P.S. §6-691(c). The School Reform Commission ("SRC") has been established pursuant to PSC, 24 P.S. §6-696, and is responsible for the operation and management and educational program of the SDP pursuant to PSC, 24 P.S. §6-696(e)(1).

2.0 Place and Date of Submission

One (1) original and four (4) copies each of the Technical Proposal and Fee Proposal shall be submitted in separate sealed envelopes clearly marked: "Professional Design Services For The Major Renovation at Albert Greenfield Elementary School RFP-TECHNICAL PROPOSAL" and "Professional Design Services For The Major Renovation at Albert Greenfield Elementary School RFP-FEE PROPOSAL" with the name of the proposing firm and their address.

Faxed and Electronically Transmitted Proposals will not be accepted.

Responses must be received by no later than 2:00 pm, Friday, July 1, 2016.

**The Proposal shall be addressed to:
School District of Philadelphia
Office of Capital Programs
440 North Broad Street, Suite 371, Office #3165
Philadelphia, PA 19130
Attn: Jerry Thompson**

3.0 Walk-Through

A mandatory project “walk-through” is scheduled on Wednesday June 15, 2016 at 10:00AM at the following location:

Albert Greenfield Elementary School
2200 Chestnut Street
Philadelphia, PA 19103

All Proposers shall assemble at the Entrance Lobby. Each firm is limited to a maximum of two (2) representatives.

4.0 Questions and Communications

All questions must be submitted in writing via e-mail to Jerry Thompson, Contracts Manager, gcthompson@philasd.org The e-mail must include the name of the Project, “Professional Design Services for the Major Renovation at Albert Greenfield Elementary School.” **The deadline for all questions is 2:00 pm, Friday June 24, 2016.** All responses for every inquiry, including amendments to this RFP, will be provided and posted on the Office of Capital Programs website which can be accessed by clicking on the following link: <http://webgui.phila.k12.pa.us/offices/c/capital-program-bids/rfps/current-rfps>

The SDP will not be bound by any oral communications. From the date of the release of the RFP to the date of authorization of a contract, there shall be no communication concerning the RFP between prospective respondents and/or their agents or staff with any SDP staff, except as provided in the RFP. Communication with other SDP staff is expressly prohibited. Any communication in violation of this provision will not be binding on the SDP and shall be grounds for immediate disqualification.

5.0 Schedule

	Task	Start Date	Duration
1	RFP Issuance	Wednesday, June 3, 2016	28
2	Proposal due	Friday, July 1, 2016	76
3	Design period start	Monday, October 17, 2016	243
4	Procurement Period start	Friday, June 2, 2017	70
5	Board Meeting	Thursday, September 14, 2017	51
6	Construction period start	Friday, October 6, 2017	692
7	Project closeout	Wednesday, August 14, 2019	7
		Total Days	1167

6.0 Budget

The estimated construction budget is \$4,270,067.

7.0 Project Scope

The School District of Philadelphia intends to enter into a contract with a professional design firm to create design documentation, provide estimates, and contract administration for the Electrical, Mechanical and General Construction as listed below and as illustrated on the attached drawings. Abatement design documentation, estimates, and contract administration will be provided under a separate contract but will be bid as part of the mechanical contractors’ scope of work.

A. Drawing List

- | | | |
|-----|-------------------------|--|
| d. | Speed | 100 fpm |
| e. | Travel | To be determined. |
| f. | Stop/Openings | Four stops. Basement Floor, Ground Floor, Second Floor and Third floor |
| g. | Power | 208, 3 phase, 3W, 60HZ |
| h. | Hydraulic Pumping Unit | New |
| i. | Elevator Car Complete | New |
| j. | Car Protection Pads | New |
| k. | Hydraulic Cylinder | New |
| l. | Safety | New |
| m. | Guide Rails | New |
| n. | Guide shoes | New |
| o. | Buffers | New |
| p. | Door Operator | New |
| q. | Door Detector | New |
| r. | Hoistway Doors | New |
| s. | Hoistway Door Openings | Existing to remain or to be modified if necessary. |
| t. | Hoistway Entrance Frame | Existing to remain and to be repainted or to be replaced with new if door opening to be modified. |
| u. | Signal Fixtures | New |
| v. | Telephone | New |
| w. | Alarm | New |
| x. | Pit Ladder | New |
| y. | Pit lights | New |
| z. | Pit GFCI receptacle | New |
| aa. | Machine Room Lights | New |
| bb. | Pictograph Signs | New |
| cc. | Fire Man Recall System | New |
| dd. | Telephone Cables | New. Provide 2 Cat 6 cables to IT racks for each elevator. |
| ee. | Elevator Operation | Key switch operation. Key switches to be provided in corridors and in cars for selection of manual or automatic operation. |
| ff. | Warranties/Maintenance | 3 years warranty and 3 years maintenance service |
| gg. | Spare Keys | Provide 30 spare elevator Keys |
- iii. Replace existing 100A, 3-phase, power supply feeder (4-#2 THW in 1-1/4" conduit) to the elevator controller (or to the hydraulic pumping unit) including disconnect switch in the machine room.
- iv. Replace existing power supply circuit for elevator cab lights and fan including disconnect switch in the machine room.
- v. Elevator shafts shall be inspected for any structural damage and if any damage found it shall be fixed.
- vi. Provide sump pump in the elevator pit including piping, power and control.
- vii. Provide ventilation in the shaft including power and control.
- viii. Provide (2) Cat. 6 telephone cables from elevator controller to the Verizon demark station.
- ix. Provide ADA signage at accessible entrances and exits.

E. Fire Alarm System Replacement

- i. Remove existing coded fire alarm system completely including fire alarm control panel, coded pull stations, bells, code transmitter for sprinkler system control panel, duct detectors for 4 AHUs, fire alarm wiring including wiring to sprinkler system control panel and power supply wiring to fire alarm control panels.
- ii. Provide new addressable fire alarm system including control panel, remote power booster panels, pull stations, horn/strobes units, smoke detectors, duct detectors, beam detectors if necessary, heat detectors, elevator recall system, fire alarm wiring, power wiring, 3 remote annunciator panels, etc. The new system shall be warranted for 3 years including maintenance service.

- iii. Provide beam detectors in high ceiling areas which may include auditorium and gymnasium.
- iv. Provide 8 new duct detectors in AHU's with fan shut down relays and wiring.
- v. Replace existing smoke detection panel for AHUs.
- vi. Provide 3 remote annunciators, one at main entrance; one in main office and one in building engineer office.
- vii. Provide elevator recall system for the new hydraulic elevator.
- viii. Reconnect existing sprinkler control panel to the new fire alarm system.
- ix. Building area is 99,555 square feet.

F. Mechanical Construction

i. Ductwork

- a. Existing ductwork is to remain except where removal is required to accommodate equipment replacement.
- b. Additionally modification to the outside air intake in the mechanical room is required to allow for installation of the stack.
- c. Complete cleaning of the ductwork is to be provided.

ii. Equipment

a. Air Handlers

- 1.) Full replacement refer to schedule for capacities on **HD-06**
- 2.) Coils shall be piped as indicated on details **7&8-HD07**
- 3.) Existing return fans shall remain
- 4.) Duct mounted OA dampers and operator to be replaced.
- 5.) Ductwork – reconnect to existing NO vibration isolation required
- 6.) Control shall be local/standalone and furnished by unit manufacturer
- 7.) Accessories – provide Agion anti microbial coating, refer to schedule for additional accessories
- 8.) Miscellaneous – provide duct detector with interface to fire alarm panel
- 9.) Electrical – reuse existing

b. Boilers

- 1.) Provide (2) hot water boilers as indicated on schedule on **HD-06**
- 2.) Refer to detail sheet for piping information on **3-HD-07**
- 3.) Electrical – provide new service

c. Cabinet unit heaters

- 1.) Full replacement refer to schedule for capacities on **HD-06**
- 2.) Repipe as indicated on detail **2-HD06**
- 3.) Control shall be local/standalone
- 4.) Electrical – reuse existing

d. Classroom unit ventilators

- 1.) Full replacement refer to schedule for capacities on **HD-06**
- 2.) Units shall be furnished with face and bypass damper control, 14 gauge cabinets, single coil, adapter back and end piping compartment.
- 3.) Second floor units shall be provided with vertical piping compartment refer to CUV elevation detail **5-H2.B**
- 4.) Ductwork – reconnect to existing NO vibration isolation
- 5.) Control shall be local/standalone by Manufacturer mounted internally
- 6.) Electrical – reuse existing
- 7.) Special instruction - replace two 72x12 outside air louvers on first floor serving CUV in room 117A and 102B

e. Convector

- 1.) Refer to schedules for capacities on **HD-06**
- 2.) Refer to details for piping arrangements **2-HD-06**

f. Dampers

- 1.) Refer to schedules for dimensions on **HD-06**
- 2.) Refer to details for arrangement **17-HD-07**

g. Fan (exhauster)

- 1.) Refer to schedules for capacities on **HD-06**
- 2.) Electrical – reuse existing

h. Heat Exchanger

- 1.) Refer to schedules for capacities on **HD-06**
- 2.) Refer to details for piping arrangements **13-HD-07**

i. Pumps (Hydronic)

- 1.) Full replacement refer to schedules for capacities on **HD-06**
- 2.) Refer to details for piping arrangements **1-HD-06**
- 3.) Electrical - all pumps P-1 thru 6 shall reuse existing
- 4.) Electrical - provide new service to P-7&8

j. Pumps (Fuel Oil)

- 1.) Refer to schedules for capacities on **HD-06**
- 2.) Refer to details for piping arrangements **12-HD-07**
- 3.) Electrical – provide new service

k. Reheat Coils

- 1.) Full replacement refer to schedules for capacities on **HD-06**
- 2.) Refer to details for piping arrangements **5-HD-06**

l. Underground Fuel Oil Tank

- 1.) Refer to schedules for capacities on **HD-06**
- 2.) Refer to details for piping arrangements **10&11-HD-06**

m. Unit Heater (gas fired)

- 1.) Refer to schedules for capacities on **HD-06**
- 2.) Refer to details for piping arrangements **4-HD-06**
- 3.) Electrical – provide new service

n. Unit Heater (hydronic)

- 1.) Existing to remain
- 2.) Repipe refer to details for piping arrangements **9-HD-07**
- 3.) Electrical – reuse existing

iii. Demolition - Additional demolition not indicated on drawings includes removal of two 36,000 BTUH condensing units located on the roof and patching where refrigerant piping penetrated.

- iv. **Gas Service** - Removal and reinstallation of new gas service and meter sets will be borne by the Utility. Provide electrical outlet and telephone drop for meter set.
- v. **Insulation** – All new and existing piping shall be reinsulated except recently installed chilled water piping in the mechanical room and chilled water risers to the rooftop chiller from the mechanical room.

G. Abatement Design Scope to be Performed Under a Separate Design Contract

8.0 Proposal Requirements

- A. Cover letter explaining the Proposer’s understanding of the project
- B. Team resumes, listing relevant projects and year completed
- C. Organizational structure of the team being proposed and organizational chart
- D. Qualifications. Provide examples of relevant projects, year completed and construction budget (5 maximum)
- E. Project approach to this engagement in narrative form for all work items
- F. Fee Proposal Attachment F
- G. Proposer’s ability to meet or reduce the schedule defined in the Scope of Work. This must include a narrative and bar chart. Any techniques that may be used to meet or reduce the proposed schedule should be explained in detail.
- H. Minimum of three references with recent experience with the firm and key personnel.
- I. All Attachments:

Attachment A - Professional Service Qualification Forms

All Prime Proposers must complete the Professional Qualification Forms in Attachment “A”. Fillable forms for Attachment A are available at the website (be patient it takes a couple minutes to open): <http://webgui.phila.k12.pa.us/offices/c/capital-program-bids/rfps/current-rfps>

Attachment B - Agreement to Contract Terms and Conditions

All Prime Proposers must Acknowledge that they are in agreement with the District’s Professional Services Contract and no changes will be made to the Contract. Only the Prime Consultant needs to complete the Acknowledgement.

Attachment C – Tax Compliance with the City of Philadelphia

Provide a copy of your firm’s “Certificate of Tax Clearance” with the City of Philadelphia.

Attachment D – Anti Discrimination Policy & Equal Opportunity Non-Discrimination Notice

All Prime Proposers must acknowledge and agree to adhere to the District’s Anti-Discrimination Policy.

Attachment E - M/WBE Participation

All Prime Proposers firms must complete the attached M/WBE Participation Plans. **Respondents to this RFP shall include 15%-20% sub-consultant participation with either a minority-owned business enterprise(s) and/or with a woman-owned business enterprise(s).**

- J. Proof of Insurance Coverage

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

Firm for the following:

- i. Workers' Compensation and Employers' Liability Insurance
- ii. Commercial General Liability Insurance
- iii. Automobile Liability Insurance
- iv. Professional Liability Insurance
- v. Excess Umbrella Insurance

Successful Proposer(s) must provide evidence of current insurance coverage prior to the execution of the Contract for Professional Design Services. The amounts and types of such insurance coverage are indicated in the Professional Design Services Contract (See Sample Contract published on website.)

9.0 Fee Proposal Attachment F

Firms responding to the RFP shall complete and return a separate Fee Proposal in a separate sealed envelope at the same time as their Technical Proposals; the fee shall be based on a percentage fee of the construction total budget of \$4,270,067. The proposer's Fee Proposal will not be opened unless and until that firm has been selected for fee negotiation.

The Final Fee shall be adjusted based on the actual low construction bid amount. Hourly rates will be utilized for additional services

10.0 Evaluation Criteria

A selection committee will review all RFP submittals and assign a technical score based on the following criteria:

- A. Qualifications of the personnel and education of the key team members to provide the services being proposed.
- B. Proposer's satisfactory performance and experience of design services for projects of similar scope, building type, size, and complexity.
- C. History of Proposer(s) in meeting budget and scheduled deadlines.
- D. Meeting of MBE and WBE goals.

If a firm does not meet the minimum technical score threshold it shall be omitted from further evaluation.

11.0 Selection Procedure

The SDP is following a Qualifications-Based-Selection (QBS) process for this solicitation.

Step 1: Technical Proposals of pre-qualified firms will be evaluated by the Selection Committee and ranked on the basis of their technical qualifications and suitability for this assignment.

Step 2: A limited number of the firms (to be determined by the SDP) with the highest rated Technical Proposals will be invited to interviews and oral presentations with the Selection Committee.

Step 3: The fee proposal of the highest rated firm will be opened and The SDP will enter into fee negotiations. (Fee Proposals for the other firms will not be opened until such time as the firm in question has been selected for fee negotiation.)

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

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

The SDP has no obligation to make an award and reserves the right to waive any non-material defects, reject all Proposals for any reason, and terminate the selection process at any time.

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

Attachment A

The School District of Philadelphia
Office of Capital Programs

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

<p>1.</p> <p>FIRM NAME & ADDRESS</p> <p><input type="text"/> <input type="text"/> <input type="text"/></p> <p>"ARE SATELLITE OFFICE(S) LOCATED IN PHILADELPHIA": If yes, please provide address(s):</p> <p><input type="text"/> <input type="text"/></p>	<p>2.</p> <p>PROJECT NAME:</p> <p><input type="text" value="RFP - Professional Design Services for HVAC Major Renovations at John Moffet ES"/></p> <p>DUE DATE:</p> <p><input type="text" value="2:00 pm - June 5, 2015"/></p>	<p>3.</p> <p>IF FIRM IS A MBE/WBE OR M/WBE PLEASE CHECK APPROPRIATE BOX BELOW AND PROVIDE CERTIFICATION</p> <p><input type="checkbox"/> MBE</p> <p><input type="checkbox"/> WBE</p> <p><input type="checkbox"/> M/WBE</p>
<p>4.</p> <p>CONTACT PERSON: <input type="text"/></p> <p>TITLE: <input type="text"/></p> <p>PHONE NUMBER: <input type="text"/></p> <p>FAX: <input type="text"/></p> <p>E-MAIL: <input type="text"/></p>	<p>5.</p> <p>IF JOINT VENTURE; NAME OF ADDITIONAL FIRM(S)</p> <p>FIRM NAME: <input type="text"/></p> <p>FIRM NAME: <input type="text"/></p>	

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

<p>6.</p> <p>TYPE OF OWNERSHIP</p> <p><input type="checkbox"/> INDIVIDUAL</p> <p><input type="checkbox"/> PARTNERSHIP</p> <p><input type="checkbox"/> CORPORATION</p> <p><input type="checkbox"/> L.L.C.</p> <p><input type="checkbox"/> OTHER: SPECIFY: _____</p>	<p>7.</p> <p>YEAR FIRMS ESTABLISHED: <input style="width: 150px; height: 20px;" type="text"/></p> <p>FEDERAL TAX ID: <input style="width: 150px; height: 20px;" type="text"/></p> <p>PHILADELPHIA</p> <p>BUSINESS PRIVILEGE LICENSE: <input style="width: 150px; height: 20px;" type="text"/></p>
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8. Stock Holder Disclosure

List below the names, home addresses, dates of birth, offices held and ownership interest all individuals, partnerships, corporations or any other owner with 5% or more interest in the firm named in Box 1 of this Form. If additional space is necessary, list on attached sheet. For entities or business concerns, disregard birth date and provide federal tax identification number instead of social security number.

Name (Last, First, Middle)	Address	Birth Date (MM/DD/YYYY)	Social Security Number*	Position Ownership %
<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>
<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>
<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>
<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>	<input style="width: 90%; height: 25px;" type="text"/>

*Disclosure of Social Security Number is voluntary.

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

9. Questionnaire

AT ANY TIME DURING THE PAST TEN (10) YEARS, HAS THE APPLICANT BUSINESS CONCERN: <i>(If yes, attach an explanation for each instance)</i>	YES	NO	COMMENTS
1) Is the applicant firm identified in Box 1 of this application owned by any other company and/or corporation?	<input type="checkbox"/>	<input type="checkbox"/>	
2) Has the applicant firm been owned by another company or firm?	<input type="checkbox"/>	<input type="checkbox"/>	
3) Has the person or entity listed in this application ever been suspended, debarred or otherwise declared ineligible, by any agency of government, from contracting to provide services, labor, material or supplies?	<input type="checkbox"/>	<input type="checkbox"/>	
4) Have any principals listed in this application ever been arrested, charged, indicted or convicted of a crime?	<input type="checkbox"/>	<input type="checkbox"/>	
5) Has the person or entity listed in this application ever been suspended, debarred or otherwise declared eligible, by any agency of government, from contracting to provide services, labor, material or supplies?	<input type="checkbox"/>	<input type="checkbox"/>	
6) Has any federal, state or local government license, permit or other similar authorization necessary to perform the work applied for herein, and held or applied for by any person or entity listed in this form been suspended or revoked, or is the subject of any pending proceedings specifically seeking or litigating the issue of suspension or revocation?	<input type="checkbox"/>	<input type="checkbox"/>	
7) Has the applicant firm been denied qualification in the past under this name or another?	<input type="checkbox"/>	<input type="checkbox"/>	
8) Have any of the principals or key personnel of the applicant firm served as principal or key personnel or owned 5% or more of any other firm (including those firms that are inactive or dissolved)? <i>(If yes, give name, name of firm, position held, % owned, remainder owned by, and dates owned.)</i>	<input type="checkbox"/>	<input type="checkbox"/>	
9) Has the applicant firm, its affiliate or any of the principals or key personnel been a party to a Bankruptcy or re-organization proceeding?	<input type="checkbox"/>	<input type="checkbox"/>	
10) Had a contract terminated for cause?	<input type="checkbox"/>	<input type="checkbox"/>	
11) Been given a final unsatisfactory performance rating on a specific project?	<input type="checkbox"/>	<input type="checkbox"/>	
12) Had liquidated damages assessed against it in connection with a contract?	<input type="checkbox"/>	<input type="checkbox"/>	
13) Engaged in any litigation with regard to any contract? <i>(If yes to any of the above, explain.)</i>	<input type="checkbox"/>	<input type="checkbox"/>	
14) Do any of the principals of the applicant firm have an ownership interest in any other entity, which is in the same line of business for which the firm is now seeking qualification? <i>(If yes, identify the name, address and federal tax ID number for such entity and the nature of the ownership interest.)</i>	<input type="checkbox"/>	<input type="checkbox"/>	
15) Is your firm or any of its principals affiliated with a manufacturer or material supplier of construction materials or equipment, financially or otherwise?	<input type="checkbox"/>	<input type="checkbox"/>	

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

10. Gross Fees from Contracts Entered into in the Past 5 Years:

YEAR	From All Entities <i>(Incl. Private Sector)</i>	From State Govt. <i>Entities</i>	From Local Govt. <i>Entities</i>	From Federal Govt. <i>Entities Comments</i>	Comments
2013	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
2012	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
2011	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
2010	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
2009	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

12. Technical Data

INSTRUCTIONS:								
1. Request all Disciplines which your firm qualifies for per the following Form 12A. At minimum firms responding to this RFP, "Professional Design Services For HVAC Major Renovation at John Moffet Elementary School" must qualify for Code 03 – HVAC Engineers.								
2. Review Professional/Technical Staff (Column D) and indicate the number of staff members in the appropriate boxes in columns E&F working full time for your firm in each specialty/discipline. There is no limit to the number of specialty/discipline on which a staff member may be entered.								
3. Indicate the total Professional/Technical Staff for each Specialty/Discipline in Column "G"								
4. Please see Form 12A for the minimum requirements to be qualified for specific Disciplines.								
A	B	C	D	E In the Office to be Qualified		F Offices in Proximity (Within 100 Miles of Primary Office)		G
Requested	Code	Discipline	Titles of Professional/Technical Staff	# of Staff with a PA License	# of Additional Technical Staff (note if licensed outside PA)	# of Staff with a PA License	# of Additional Technical Staff (note if licensed outside PA)	(E+F) Total Staff
<input checked="" type="checkbox"/>	01	Architecture	Architects	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	02	Electrical Engineering	Electrical Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	03	HVAC Engineering	HVAC Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	04	Plumbing Engineering	Plumbing Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	05	Civil Engineering	Civil Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	06	Sanitary Engineering	Sanitary Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	07	Structural Engineering	Structural Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	08	Mech. Eng. (Elevators, Conveyors)	Mechanical Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	09	Soils Engineering	Soils Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	10	Fire Protection Engineering	Fire Protection Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	11	Environmental Engineering	Environmental Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _
<input type="checkbox"/>	12	Marine Engineering	Civil Engineers	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _	_ _ _ _

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

12. Technical Data

A	B	C	D	E In the Office to be Qualified		F Offices in Proximity (Within 100 Miles of Primary Office)		G
				# of Staff with a PA License	# of Additional Technical Staff (note if licensed outside PA)	# of Staff with a PA License	# of Additional Technical Staff (note if licensed outside PA)	
<input type="checkbox"/>	13	Landscape Design	Landscape Architects	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	14	Planning (Master)	Planners (PA Licensed A.I.C.P.)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	15	Land Surveying	Surveyors	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	16	Aerial Surveying	Surveyors	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	17	Hydrographic Surveying	Surveyors	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	18	Fire & Life Safety Renovations	Architects/Engineers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	24	Barrier Free/ADA Design	Architects/Engineers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	25	Estimating/Cost Analysis	qualification not required	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	27	Interior Design/Space Planning	Interior Design	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	28	Roofing Inspection	Roofing Inspectors	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	29	CPM	Schedulers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	30	Archaeology	Archeologists	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	31	Geology	Geologists	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	32	Value Engineering	Architects/Engineers/Estimators	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	33	Historical Preservation/Restoration	Architects	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

12. Technical Data

A	B	C	D	E In the Office to be Qualified		F Offices in Proximity (Within 100 Miles of Primary Office)		G
				# of Staff with a PA License	# of Additional Technical Staff (note if licensed outside PA)	# of Staff with a PA License	Requested	
Requested	Code	Discipline	Title of Professional/Technical Staff					Code
<input type="checkbox"/>	34	Roofing Consultant	Architects/Engineers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	36	Acoustics	Acousticians	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	38	Asbestos Safety Control Monitoring	AHERA Project Designers (Firm Certified By DLI)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>			Asbestos Safety Technicians (Certified By DLI & City of Philadelphia L&I)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	37	Claims Analysis	Claims Analysts/Estimators	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	38	Telecommunications	Telecommunications Specialists	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	39	Exhibit/Interpretive Design	Designers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	40	Feasibility Planning	Planners/Architects/Engineers/ Demographers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	41	Fire Detection Systems	Fire Detection Specialists	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	42	Fire Protection Systems	Fire Protection Specialists	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	43	Food Service	Food Service Consultants	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	44	Hydraulics/Pneumatics	Hydraulic Engineers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	45	Hydrology	Hydro geologists	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	46	Security Systems	Security System Consultants	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	47	Site Planning	Planners/Architects/Engineers/ Landscape Architects	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

12. Technical Data

A	B	C	D	E In the Office to be Qualified		F Office in Proximity (Within 100 Miles of Primary Office)		G
Requested	Code	Discipline	Title of Professional/Technical Staff	# of Staff with a PA License	# of Additional Technical Staff (note if licensed outside PA)	# of Staff with a PA License	Requested	Code
<input type="checkbox"/>	48	Testing & Balancing (HVAC) (Firm Must Have Testing Equipment)	HVAC Engineers (Cert. by National Envir. Balancing Bureau)					
<input type="checkbox"/>	49	Traffic	Traffic Analysts					
<input type="checkbox"/>	50	Transportation	Civil Engineers					
<input type="checkbox"/>	51	Waste/Water Treatment	Civil/Sanitary Engineers					
<input type="checkbox"/>	52	Energy Management Control Systems	HVAC/Electrical Engineers					
<input type="checkbox"/>	53	Radon Management Consultant	DEP Certified Consultants					
<input type="checkbox"/>	54	Construction Field Inspection	Architect/Engineer					
<input type="checkbox"/>	55	Elevator Plan Review, Testing/ Inspection	DLI Certified Specialists					
<input type="checkbox"/>	56	Environmental Consultant	Environmental Specialists					
<input type="checkbox"/>	57	Underground Storage Tank Removal	DEP Certified Specialists (SSE) and DEP Certified Firm					
<input type="checkbox"/>	58	Underground Storage Tank Installation	Engineer (DEP Firm Certified)					
<input type="checkbox"/>	59	Boilers/Steam Lines	Engineers					
<input type="checkbox"/>	60	Indoor Air Quality	Industrial Hygienists					
<input type="checkbox"/>	61	Landfill Closure	Environmental Engineers					
<input type="checkbox"/>	62	Lead Paint Evaluation/Inspection	DOH Certified Tech (DLI Firm Certified)					
<input type="checkbox"/>	63	Lighting Design	Electrical PE or Registered Architect					
<input type="checkbox"/>	64	Technology	Electrical PE or Computer Science Degree					

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

12A. Professional Technical Data

At minimum firms responding to this RFP, "Professional Design Services for the Mechanical Master Plan at Martin Luther King High School" must qualify for Code 03 – HVAC Engineering.

The following are the minimum requirements required for a firm to be qualified for each specific Discipline:

Code	Discipline	Minimum Requirements
0	Engineering	Principal PA Professional Engineer -or- meet requirement for Architecture (code 1) plus one staff Professional Engineer in any state -or- Principal Professional Engineer in any state plus one staff Professional Engineer in PA
1	Architecture	Principal PA Registered Architect -or- Principal Registered Architect in any state plus one staff Registered Architect in PA -or- Principal Professional Engineer in any state with 3 staff Registered Architects in PA
2	Electrical Engineering	Meet requirement for Engineering (code 0) plus have Electrical Engineering staff
3	HVAC Engineering	Meet requirement for Engineering (code 0) plus have HVAC Engineering staff
4	Plumbing Engineering	Meet requirement for Engineering (code 0) plus have Plumbing Engineering staff
5	Civil Engineering	Meet requirement for Engineering (code 0) plus have Civil Engineering staff
6	Sanitary Engineering	Meet requirement for Engineering (code 0) plus have Sanitary Engineering staff
7	Structural Engineering	Meet requirement for Engineering (code 0) plus have Structural Engineering staff
8	Mech. Eng. (Elevators/Conveyors)	Meet requirement for Engineering (code 0) plus have Mechanical Engineering staff
9	Soils Engineering	Meet requirement for Engineering (code 0) plus have Soils Engineering staff
10	Fire Protection Engineering	Meet requirement for Engineering (code 0) plus have Fire Protection Engineering staff
11	Environmental Engineering	Meet requirement for Engineering (code 0) plus have Environmental Engineering staff
12	Marine Engineering	Meet requirement for Engineering (code 0) plus have Marine Engineering staff
13	Landscape Design	Principal PA Registered Landscape Architect -or- Principal Registered Landscape Architect in any state plus one staff Registered Landscape Architect in PA -or- Principal Professional Engineer in any state with 3 staff Registered Landscape Architects in PA -or- meet requirement for Architecture (code 1) with staff Registered Landscape Architect in PA
14	Planning Master	Registered PA Planner (A.I.C.P.)
15	Land Surveying	Principal PA Professional Surveyor, Principal Professional Surveyor in any state with staff PA Professional Surveyor -or- meet requirement for Engineering (code 0) with staff PA Professional Surveyor -or-meet requirement for Architecture (code 1) with staff PA Professional Surveyor
16	Aerial Surveying	Meet requirements for Land Surveying (code 15)
17	Hydrographic Surveying	Meet requirements for Land Surveying (code 15)
18	Fire & Life Safety Renovations	Meet requirements for Engineering (code 0) -or- meet requirements for Architecture (code 1)
24	Barrier Free/ADA Design	Meet requirements for Engineering (code 0) -or- meet requirements for Architecture (code 1)
25	Estimating/Cost Analysis	Must have a Registered Architect or Professional Engineer from any state on staff
27		Principal Interior Designer -or- meet requirements for Architecture (code 1)
28	Roofing Inspection	Meet requirements for Engineering (code 0) -or-meet requirements for Architecture (code 1)
29	CPM	Must have a Registered Architect or Professional Engineer from any state on staff
30	Archeology	Must have Archeologist on staff
31	Geology	Must have Geologist on staff
32	Value Engineering	Must have a Registered Architect or Professional Engineer from any state on staff
33	Historic Preservation / Renovation	Meet requirements for Architecture (code 1)

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

12A. Professional Technical Data		
The following are the minimum requirements required for a firm to be qualified for a specific Specialty/Discipline:		
Code	Code Specialty/Discipline	Minimum Requirements
34	Roofing Consultant	Meet requirements for Engineering (code 0) -or- meet requirements for Architecture (code 1)
35	Acoustics	Meet requirements for Engineering (code 0) -or- meet requirements for Architecture (code 1) -or- extensive acoustic design experience of Principal
36	Asbestos Safety Control Monitoring	DLI Certification
37	Claims Analysis	Meet requirements for Engineering (code 0) -or- meet requirements for Architecture (code 1)
38	Telecommunications	Meet requirements for Engineering (code 0) with telecommunications staff
39	Exhibit / Interpretative Design	Relevant staff
40	Feasibility Planning	Meet requirements for Engineering (code 0) -or- meet requirements for Architecture (code 1)
41	Fire Detection Systems	Meet requirements for Engineering (code 0) -or- meet requirements for Architecture (code 1)
42	Fire Protection Systems	Meet requirements for Engineering (code 0) -or- meet requirements for Architecture (code 1)
43	Food Service	Food Service Specialist on staff
44	Hydraulics / Pneumatics	Meet requirements for Engineering (code 0) with hydraulics staff
45	Hydrology	Hydrologist on staff
46	Security Systems	Meet requirements for Engineering (code 0) with security design staff
47	Site Planning	Meet requirements for Engineering (code 0) - or- meet requirements for Architecture (code 1) -or- meet requirements for Planning Master (code 14)
48	Testing & Balancing (HVAC)	Meet requirements for Engineering (code 0) with proper certifications for testing and balancing
49	Traffic	Meet requirement for Engineering (code 0) plus have Traffic Engineering staff
50	Transportation	Meet requirement for Engineering (code 0) plus have Transportation Engineering staff
51	Waste Water Treatment	Meet requirement for Engineering (code 0) plus have Waste Water Treatment Engineering staff
52	Energy Management Control Systems	Meet requirement for Engineering (code 0) plus have Energy Management Engineering staff
53	Radon Management Consultant	DEP Certification
54	Construction Field Inspection	Meet requirements for Engineering (code 0) -or- meet requirements for Architecture (code 1)
55	Elevator Plan Review, Testing/Inspection	DLI Certified Specialist on staff
56	Environmental Consultant	Meet requirements for Environmental Engineering (code 11) or a principal of the firm is a Certified Industrial Hygienist (CIH) or 3 employees of the firm are Certified Industrial Hygienists (CIH)
57	Underground Storage Tank Removal	DEP Certified Firm with DEP Certified Specialist (SSE) staff
58	Underground Storage Tank Installation	DEP Certified Firm
59	Boilers / Steam Lines	Meet requirements for HVAC Engineering (code 3)
60	Indoor Air Quality	Meet requirements for Environmental Engineering (code 11)
61	Landfill Closure	Meet requirements for Environmental Engineering (code 11)
62	Lead Paint Evaluation / Inspection	Meet requirements for Environmental Engineering (code 11)
63	Lighting Design	Meet requirement for Engineering (code 0) plus have Lighting Design staff
64	Technology Infrastructure	Meet requirement for Electrical Engineering (code 2) -or- have staff with Bachelor of Science Degree in Computer Science

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

13. Previous Project Experience

DISCIPLINE Use codes from Box 12, Column B	PROJECT NAME, LOCATION, AND BRIEF DESCRIPTION	PROJECT OWNER, CONTACT PERSON & PHONE NUMBER	CONSTRUCTION COST ESTIMATE	TOTAL VALUE OF CHANGE ORDERS	YEAR WORK COMPLETED

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

14. Describe claims for errors and/or omissions made against your firm over the past two years. If none, state so here.

Date Claim Filed	Construction Contract Value	Project Design Fee	Brief Description of Claim	Amount of Settlement, if ongoing, so state
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PROFESSIONAL SERVICES REQUEST FOR QUALIFICATIONS

15. Provide Financial Statements

Preferred:

- * Audited Financial Statements for the last two years including:
 - Auditor's reports
 - Balance Sheets
 - Statements of income & retained earnings
 - All footnotes of these statements
- * Corporate Annual Report (if applicable)
- * Current Balance Sheets reflecting last six months.

If not available, then:

- * Reviewed Financial Statements for last two years, including:
 - Balance sheets
 - Statements of income and retained earnings
 - All footnotes to these statements

16. Certification by Preparer:

I, _____ (*print name*), being duly sworn upon my oath, hereby represent and state that the foregoing information and any attachments thereto to the best of my knowledge are accurate, true and complete. I acknowledge that the School District of Philadelphia (SDP) is relying on the information contained herein and thereby acknowledge that I am under a continuing obligation from the date of this certification through the completion of any contracts with SDP to notify it and its Agent(s) in writing of any changes to the answers or information contained herein. A material false statement or omission made in connection with this application will subject the applicant firm and me to civil and criminal penalties available by law. I authorize SDP and their Agent(s) to verify any answer(s) contained herein, to investigate the background and creditworthiness of the firm stated herein and to enlist the aid of third parties in its investigation process.

I, being duly authorized, certify that the information supplied above, including all attached pages, is complete and correct to the best of my knowledge.

PRINT NAME: _____
SIGNATURE: _____
TITLE: _____
DATE: _____

ATTACHMENT B

SAMPLE PROFESSIONAL DESIGN SERVICES CONTRACT

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

I have read the “Professional Design Services Contract” and agree to enter into a Contract for this Project under the Terms and Conditions of the Contract and will not take any exceptions to the Terms and Conditions.

Firm Name: _____ Corporate Seal: Affix Here

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

ATTACHMENT C

City of Philadelphia Tax Compliance

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

You can search your firm's tax compliance by clicking on the following web link:

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

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

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

**ATTACHMENT D
ANTI-DISCRIMINATION POLICY & EQUAL OPPORTUNITY NON-DISCRIMINATION
NOTICE**

**of the
SCHOOL DISTRICT OF PHILADELPHIA**

ADOPTED NOVEMBER 14, 2007

SECTION 1. THE POLICY

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

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

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

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

SECTION 2. PROCEDURES FOR IMPLEMENTATION

1. Articulation of the Policy. Staffing and Reporting

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

2. Promotion of M/W/BEs

The District recognizes the importance of having meaningful and substantial M/W/BE participation in all Contracts. To that end, the District will take steps to ensure that M/W/BEs are afforded a fair and equal opportunity to participate. Those steps may include but are not limited to: (i) making public contracting opportunities; (ii) advertising in newspapers and periodicals published by community-based organizations and M/W/BEs; and (iii) designing bid packages in such a way as to promote rather than discourage M/W/BE participation.

3. Contracting Requirements

a. Bids, Request for Proposals and Public Solicitations

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

b. Contracts for Professional Services

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

4. Sanctions

The Participation Plan shall be a part of each Contract between the District and a Contractor and shall be enforceable as any other contractual term or condition. Sanctions for breach of a

Participation Plan may include suspension, cancellation of the Contract and/or disbarment from future contracting opportunities with the District.

EQUAL OPPORTUNITY

A. EQUAL OPPORTUNITY

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

B. NON-DISCRIMINATION

1. Non-Discrimination in Hiring

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

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

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

2. NON-DISCRIMINATION IN CONTRACTING

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

- (a) The Respondent will consider all proposals from potential M/WBE firms and document on the forms supplied by the School District, the reasons for not entering into a joint venture or subcontract with a M/WBE.
- (b) Respondent to this RFP will include 15%-20% sub-consultant participation with either a minority-owned business enterprise(s) and/or with a woman-owned business enterprise(s).**
- (c) Where the Respondent proposes to perform the total contract with its own work force without any joint venture or subcontracting, before the contract is awarded, the Respondent will submit to the School District, information sufficient for the School District to determine that the Respondent has made a good faith effort to attain meaningful and substantial participation of M/WBEs.
- (d) The Respondent's agreement to meet the requirements of the Section is a material representation of fact upon which reliance will be placed if a contract is awarded. If it is later determined that the Respondent has not made a good faith effort to comply, within the School District's sole judgment, the School District may pursue available remedies,

including suspension or debarment of the Respondent from future School District work as non-responsible.

C. LIABILITY OF SUBCONTRACTORS

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

D. PENALTIES FOR FAILURE TO COMPLY

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

_____ (seal)

(Trade Name of Firm)

_____ (seal)

(Signature of Owner or Partner)

ATTACHEMENT E
SCHOOL DISTRICT OF PHILADELPHIA
OFFICE OF PROCUREMENT SERVICES

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

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

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

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

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

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

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

ATTACHMENT F

Fee Proposal – Page 1 of 2

PROPOSING FIRM: _____

Fee for this project will be based on Percentage of Construction Cost Method, see section 6.2.1 of the “Professional Services Sample Contract”.

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Project Construction Value

Proposed Fee

Over \$1,000,000

_____ %

The Designer’s percentage of construction cost on this project shall be all-inclusive. The Designer shall be entitled to payment for the authorized reimbursable expenses provided in 6.8 of the “Professional Services Sample Contract”.

ATTACHMENT F
Fee Proposal Sheet - Page 2 of

Project: Professional Design Services For Major HVAC Renovation at Albert Greenfield Elementary School

PROPOSING FIRM NAME: _____

Hourly rates will be utilized for any authorized and approved additional services, see section 6.7,

of the “Professional Services Sample Contract”.

Company	Person	Position	Hourly Rate
Key Personnel for Structural			
		Structural Principal In Charge	
		Licensed Structural Engineer	
		Drafter/CADD Operator	
		Clerical	
Key Personnel for Architectural			
		Architectural Designer, Principal In	
		Project Manager	
		Licensed Architect	
		Construction Administrator	
		Drafter/CADD Operator	
		Clerical	
Key Personnel of MEP Engineering			
		MEP Principal In Charge	
		Licensed HVAC Engineer	
		Licensed Electrical Engineer	
		Licensed Plumbing Engineer	
		Drafter/CADD Operator	
		Clerical	
Key Personnel for Civil Engineering			
		Civil Principal In Charge	
		Licensed Civil Engineer	
		Drafter/CADD Operator	
		Clerical	
Key Personnel for Cost			

		Estimator	
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