DATE: February 1, 2021
TO: All interested responders
FROM: Karen Huiett

SUBJECT: Request for Qualifications for Facilities Professional/Technical Consultant Master Contract (FACPTMC)

ADDENDUM #1

General Information
1. The slide deck presented during the RFQ Informational meeting on Thursday, January 28, 2021 is included as an attachment to this addenda.
2. A set of Frequently Asked Questions is included as an attachment to this addenda.

Questions
3. The following questions and clarifications were provided during the informational webinar:
   a. Question: If our firm was certified in 2018, it’s my understanding that our contract will be valid through May of 2022?
      Response: A contract executed in 2018 would be valid for almost 5 years, or through 2023. Please review your contract or check the database to verify the actual expiration date.

   b. Question: The RFP notes that the process will be updated in 2022. Is the current format/process indicative of what we will see next year?
      Response: We do not have information available at this time.

   c. Question: We were previously contracted but are not currently under contract. Can we get a preliminary review as a ‘new’ consultant?
      Response: No.

   d. Question: If we are under current contract, but would like to add a service (energy modeling), can we submit for preliminary review for that service?
      Response: No.

   e. Question: We are currently on the Master Contract list but have had a company name change. Do we need to resubmit?
Response: If the firm’s legal name changed (not a “doing business as” name change), or changed the firm’s federal tax id number, then your firm will need respond to this RFQ as a new vendor, submit all required documents, and execute a new master contract.

f.  Question: Just to confirm, our expiration is 2022, therefore we do not need to submit this year unless we are adding services?
Response: Correct.

g.  Question: We have a contract that expires in 2022, and I understand we don’t need to resubmit, but do we need to update our rates?
Response: No, rates are not requested as part of this RFQ.

h.  Question: Is this the only year for the RFQ for master contracting or will there be other opportunities in the next few years?
Response: This RFQ is the only time the opportunity will be available this year. The master contracting process may change significantly next year. It is possible that any contract executed this year may only be used for one year. It is also possible that any contract executed this year may be valid for the entire term of up to five years.

i.  Question: My firm has been in business for 6 years. Do we qualify for the master contract?
Response: It depends on the firm’s project experience, the credentials of key personnel, and the other requirements listed in the RFQ.

4.  The following questions were submitted via email:
   a.  Question: Since some of the pre-design, planning and analyst functions do not involve design leading directly to construction, is architectural licensure a requirement for these Specialty Services?
   Response: Refer to the minimum FAC P/T MC Consultant Criteria, Credentials of Key Personnel, for the specialty service for which you wish to apply for licensure requirements.

   b.  Question: What email address should we submit our Preliminary Evidence of Qualifications to?
   Response: FACPTMC@minnstate.edu

Summary of attachments:
1.  Slide deck from informational meeting, revised.
2.  Frequently Asked Questions (FAQ).

END OF ADDENDUM #1
State of Minnesota
Minnesota State Colleges and Universities

Frequently Asked Questions
About the
Request for Qualifications (RFQ)
for
Facilities Professional/Technical Consultants Master Contract

Section 1.0 - GENERAL QUESTIONS

1.01 Q - If our firm is listed on the current Minnesota State Facilities Professional/Technical Consultants Master Contract (“FAC P/T MC”) Database, do we need to respond to this RFQ?

A – It depends.

YES, if your firm would like to ADD a Specialty Services to their master contract. Responding to the RFP will pre-qualify consultants with specific minimum criteria for each Specialty Service therefore we require vendors to submit qualifications for each new Specialty Service.

NO, if your firm does not wish to add Specialty Services. Pre-qualified consultants have met specific minimum criteria for each Service Specialty.

1.02 Q - Where can I view the current Minnesota State’s FAC P/T MC Database?


1.03 Q - Does the company responding to the RFQ need to be located specifically in Minnesota or can they have offices in other States and still be allowed to perform these tasks?

A - A company does not need to be located in Minnesota to be included. Firms that list services which require professional licensure and certification for practice in the state of Minnesota must directly employ those individuals with the appropriate credentials.
1.04 Q – What is the Preference status - Targeted Group/Economically Disadvantaged/Veteran-Owned (TG/ED/VO)?

A – It is a program administered through the Minnesota Department of Administration, Material Management Division (MMD) for small businesses which are either:
   TG - Targeted group
   ED - Economically disadvantaged
   VO – Veteran Owned

Following is a website with a more thorough explanation and lists certified firms: www.mmd.admin.state.mn.us/mn02001.htm

1.05 Q – What is the Veteran preference?

A – This is a preference established in accordance with M.S. 16C.16, eligible verified veteran-owned small businesses with their principal place of business is in Minnesota, may receive a preference when responding to solicitations issued by state agencies. Additional information can be found in Section VIII of the Request for Information.

Eligible veteran-owned small businesses must be currently verified by the United States Department of Veteran Affairs’ Center for Veterans Enterprise prior to the RFQ due date and time to receive the preference on the Facilities Professional/Technical Consultants Master Contract List. Information regarding verification by the United States Department of Veterans Affairs may be found at http://www.va.gov/osdbu/

1.06 Q – What are some examples of the proof of authority needed for the authorized signature?

A – Some examples are by-laws, articles of incorporation, resolutions, or ordinances. A letter on the company letterhead indicating an individual has the authority is sufficient.

1.07 Q – Is there a form for the proof of authority for the person signing the contract?

A - No, we do not provide a form for this documentation because organizational structures vary by consultant.

1.08 Q – What number should be listed for the Addenda?

A - The number indicates that the consultant acknowledges all addenda issued by Minnesota State during the RFQ process. It is the consultant’s responsibility to periodically check the website for updates.

1.09 Q – Should the responses be typed or hand-written?

A - Please type your response in the space provided.

1.10 Q – Do all attachments require original signatures? What about the electronic copy?
A - Yes, all the attachments as well as the other submittal documents require original signatures where indicated. For the electronic copy, first sign, then make a pdf, then rename the file as recommended and include the file in your response.

1.11 Q – Where do we list multiple office locations?

A - The Firm Registration form includes space where the consultant may list other office locations (in the United States).

1.12 Q – We are not currently registered in the SWIFT system. If it is a prerequisite, can we proceed with registering with SWIFT simultaneously?

A – Every individual and organization doing business with the state is considered a vendor. New or prospective vendors must register through SWIFT. Yes, you may proceed by concurrently registering through SWIFT and responding to this RFQ.

1.13 Q – If we are currently qualified for a specialty, do we need to submit again?

A – No, the master contract is valid for up to five years.

1.14 Q – But if we are currently qualified, we should still resubmit COI or other attachments where dates have expired?

A – Yes, this is a condition of the master contract.

1.15 Q – For the service “Architecture – Comprehensive Facility Planning,” the RFP description seems to infer that range of studies and planning apply. In other words, not only a total campus analysis/plan, but potentially a subset of any of the activities that may go into comprehensive plans, as well as targeted planning, such as for a single department or building. Is this interpretation correct?

A – Yes, because of the range of size of our institutions, smaller campuses may only require a fraction of the possible subsets necessary for a comprehensive facilities plan.

Section 2.0 – Evidence of QUALIFICATIONS QUESTIONS:

2.01 Q – How many Key Personnel are required for each Specialty?

A – A minimum of one (1) appropriately credentialed individual is required as a minimum. Additional senior level staff who are typically responsible for leading project teams may be included.

2.02 Q - Are the Specialty Services listed required to be provided from within our firm? Can sub-consultants be out-sourced, such as hiring a Landscape Architect or Mechanical Engineer?

A – Yes, the Specialty Services must be provided directly within your firm. No, out-sourced services may not be included.
2.03 Q – Can we include individual project experience earned with another firm?

A – No.

2.04 Q - Do firms need to be on the FAC P/T MC database in order to be considered for any Minnesota State work?

A – No, a campus may choose a variety of solicitation methods according to the anticipated fee.

2.05 Q – What are some examples of acceptable state and local government owners?

A – Some examples include the Metropolitan Council, the Capitol Area Architectural and Planning Board, the Minnesota Zoo or the University of Minnesota. A more comprehensive list can be found at http://mn.gov/portal/government/state/agencies-boards-commissions/.

2.06 Q – Can we list the same project for more than one Specialty?

A – Yes, if the service provided per the contract corresponds to the Specialty.

2.07 Q – If my firm is on the FAC P/T MC Database, will we be notified of all Minnesota State projects in order to provide project specific proposals?

A – No. Being included in the FAC P/T MC database is not a guarantee of work with Minnesota State. Minnesota State does not have a system that notifies consultants of project opportunities at the campuses, as projects vary in size and source of funding. It is acceptable for firms to connect directly with Minnesota State colleges or universities http://www.finance.mnscu.edu/about/staffdirectory/index.html or other vendor opportunities at http://www.minnstate.edu/vendors/index.html.

2.08 Q – Do K12 school districts count as local government?

A – Yes.

2.09 Q – Do firms pass/fail per specialty?

A – Yes, firms may qualify for some Specialty Services but not others. Consultants will be notified of their status for each specialty submitted.

2.10 Q – If a specialty has only one Key Personnel listed in the minimum criteria, does that mean that they are the only person allowed to work on project in that specialty?

A – No, the Minimum FAC PT Consultant Criteria states the minimum number of credentialed individuals needed to qualify for a Specialty Service.

2.11 Q – What determines if a project is completed?
A – If the consultant has met all of the contractual obligations prior to submitting the response to the RFQ, then the project may be considered complete. The consultant must include the month and the year the project was completed on the Evidence of Qualifications.

2.12 Q – Does the Primary Contact listed on the Firm Registration form need to be licensed in Minnesota?

A – No, the Primary Contact is only required to have the authority to enter the firm into a contract.

2.13 Q – Is it appropriate to apply for specialty service that are being developed at our company by a person with the required amount of experience? Our key personnel has the experience, but the firm does not yet.

A – The number of required years of experience, along with the required professional licensure, are appropriately related to the individual. The number of completed projects is related to the firm. In order for the firm to qualify, the firm must have both – required number of completed projects and the people with the requisite licensure and experience.

Section 3.0 - INSURANCE QUESTIONS

3.01 Q – Our firm is reviewing the contract and noticed that on the insurance part in the Professional Liability section you are requesting a ‘not to exceed’ deductible of $50,000. It does not state that on my firm’s certificate of insurance nor does it state that on the example certificate or insurance. Does it need to say that on the Certificate of Insurance?

A – Yes, please state the deductible amount.

3.02 Q – We assume a Certificate of Insurance is not required now with this contract at this submittal, but will be required at the time a consultant is selected for a specific project work. Is this assumption correct?

A – A Certificate of Insurance is required with the submittal of the Facilities Professional/Technical Consultants Master Contract. It must be in accordance with the contract and the effective dates on the insurance certificate must be valid at the time of the contract.

In addition, a current certificate of insurance must be provided to the requesting Minnesota State Authorized Representative at the time of selection for a specific project.

3.03 Q – The E&O coverage that our firm currently has is $1,000,000/$2,000,000 for annual aggregate. We see that the requirements are $2,000,000 for each. Is it acceptable for our firm to increase our limits to the required $2,000,000 upon our firm signing a project contract with Minnesota State?

A – The contract modifications you requested for liability can’t be accommodated. A Certificate of Insurance is required with the submittal of the Facilities Professional/Technical Consultants Master Contract. It must be in accordance with the contract.

This requirement is in place because we are executing a contract at this time.
3.04 Q – The Request for Qualifications references a sample Certificate of Liability Insurance and the master contract. Firms need to provide General Liability: $2,000,000 each occurrence; Personal & Advertising Injury $2,000,000; and Automobile Liability: Combined Single Limit (each accident) $2,000,000.

In lieu of the above, is it acceptable for us to provide General Liability: $1,000,000 each occurrence; Personal & Advertising Injury $1,000,000; and Automobile Liability Combined Single Limit (each accident) $1,000,000 PLUS an Umbrella Liability policy with limits of $1,000,000 each occurrence and $1,000,000 aggregate for each of the three areas described above to reach the $2,000,000 limit for each?

A - Yes, it is acceptable to supplement existing insurance coverage with an umbrella policy to meet the contractual insurance limits.

3.05 Q – Can umbrella insurance cover a required limit that is not met?

A - Umbrella insurance can cover gaps in General Liability but not Professional Liability or Worker’s Compensation.

3.06 Q - Is a $2,000,000 policy required for a sole proprietor who might not do a lot of annual work for a Minnesota State institution?

A – The insurance limits apply as a 'one-size' fits all for various company sizes. Therefore, a firm would need to meet all the contractual insurance limits.

However as a sole proprietor, workers compensation insurance is not applicable. Therefore, in order for Minnesota State to properly evaluate your Facilities Professional/Technical Consultants Master Contract submission, please indicate on the Firm Registration Form that the CONSULTANT is an individual.

3.07 Q – When submitting the certificate of insurance forms, are the additional insured phrases and endorsement forms required? Or is it acceptable for our firm to provide this information when a specific project arises?

A – Yes. A Certificate of Insurance that is in accordance with the contract is required with the submission of the Facilities Professional/Technical Consultants Master Contract. In addition, for general liability and business automobile liability, the Additional Insured clause and Insurance Services Office (ISO) forms or their equivalent are to be submitted in conjunction with the Certificate of Insurance.

This requirement is in place because we are executing a contract at this time.

3.08 Q - Does my insurance certificate for Workers Compensation or Professional Liability Insurance need to list Minnesota State Colleges & Universities as the Certificate Holder?

A - Yes, the Certificate of Insurance should list Minnesota State Colleges & Universities as the holder. We do not require specific language for this section, however, typically the address is also included. As an example:

Minnesota State Colleges & Universities
Attn. Design and Construction
30th Seventh Street East, Suite 350
St. Paul, MN 55101
3.09.Q – On the Certificate of Insurance, do we identify the Additional Insured as “MnSCU” or “Minnesota State”?

A - The appropriate identification for the Additional Insured is “Board of Trustees of Minnesota State Colleges and Universities and its officers and members” as shown on the Example Certificate of Insurance included in the Appendix of the RFQ.

3.10.Q – Our certificate of insurance is due for renewal during the evaluation period. Can we issue an updated insurance certificate prior to the official date of contract execution?

A - Yes, but please submit a certificate of insurance that is valid on RFQ due date.

3.11.Q – What if our firm would like an exception to the $50,000 deductible maximum?

A - Send a request in writing, specifying the amount of the desired deductible and provide financial documentation by submitting the firm’s most current audited financial statements, so that Minnesota State can ascertain the ability of the CONSULTANT to cover the deductible from the CONSULTANT’s own resources.

Section 4.0 - Contract QUESTIONS

4.01.Q – Are campuses required to rotate consultants or can they choose to work with the same consultant multiple times?

A - Campuses are encouraged to rotate. Requirements for the selection process vary based on the estimated fee.

4.02.Q – Do you have any recommendations for ways we can find out about upcoming projects?

A - Other Vendor Opportunities may be found at http://www.minnstate.edu/vendors/index.html

4.03.Q – If a project requires multiple disciplines, will each Specialty Service be pursued separately, or will a prime consultant be contracted with sub-consultants?

A - The campus will contract with the prime Specialty Service. The prime consultant would then select their sub-consultants as applicable.

4.04.Q – Please explain e-Builder?

A - We will continue to use e-Builder as our enterprise project management system. Professional/Technical consultants and contractors are typically required to process all paperwork in e-Builder. Using e-Builder helps the campus and project participants know the status of the project. Using e-Builder helps facilitate the signing of contracts and the prompt payment to vendors. Training is provided at the Minnesota State system office but may also be offered regionally.

4.05.Q – If my contract is amended, will there be a time extension?

A – No, the term of the master contract is five years from the first date of the fully executed contract.
4.06 Q – If I am the only person in my firm, is my contract different?

A – Yes, there are additional clauses required in the master contract for firms that have only one person. Please be sure to check the appropriate box on the Firm Registration form.

END OF FREQUENTLY ASKED QUESTIONS
Facilities Professional/Technical Consultant
Master Contract (FAC P/T MC)
RFQ Informational Meeting via Zoom
Introductions

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Justine Pliska, CID, LEED BD+C
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Facilities | System Office
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Justine.Pliska@MinnState.edu
Your time is valuable!

- We will answer questions at the end of the presentation.
- Please submit questions via the chat function.
- Slides and answers will be posted in an addenda.
- Please mute phones and computers.
Facilities P/T Consultant Master Contract Agenda

• Purpose of Master Contracting
• What to do if your firm has a current 2017, 2018, 2019, or 2020 master contract
• RFQ Process Overview
  – RFQ Submittal
  – Master Contract Execution
  – Master Contract Maintenance
• Tips for Success
• Q & A
Purpose of Master Contracting

• **Goals**
  • Provide a streamlined selection process for Professional/Technical services for our campuses.
  • Accelerate the contracting process.
  • Identify qualified consultants for each service based on minimum qualifications.
  • Reduce the amount of work for consultants
What to do if your firm has a 2017, 2018, 2019, or 2020 master contract:

1. Changes in Firm Registration
   • Submit an updated Firm Registration at anytime to FACPTMC@MinnState.edu

2. ADD Specialty Services
   • Respond to the RFQ.
   • Submit the following:
     • Transmittal Letter for Current Vendors
     • Evidence of Qualifications (EoQ) for the Specialty Service
     • Current and complete Certificate of Insurance (COI)
     • Current Workforce Certificate
     • Current Equal Pay Certificate of Compliance
2021 Minor Changes and Clarifications

- New Specialty – Energy Modeling
- **OPTIONAL** - Preliminary review of Evidence of Qualifications (EoQ)
  - Submit draft of only the EoQ for **by February 9** to FACPTMC@Minnstate.edu
  - Receive recommendations from us by February 12
  - Firm is responsible to incorporate recommendations and submit the final EoQ by the RFQ due date
Typical reasons firms fail to qualify for a Specialty Service:

1. Required MN License number was omitted on Evidence of Qualifications form
2. Failed to submit minimum required number of projects
3. Minimum number of projects did not qualify
   a) Project submitted was not completed by required date
   b) Project submitted was not relevant to Specialty Service
   c) Description of services was inadequate or incomplete
4. Missing required Laboratory or Testing Agency
5. Hard copy submittal was late
Process Overview

1. RFQ
   • Solicitation
   • Informational Mtg
   • Addenda

Posted at http://www.minnstate.edu/vendors/index.html
Look under FACILITIES CONSULTANT & CONTRACTOR OPPORTUNITIES

2. Submittal
   • Transmittal Form
   • Firm Registration
   • Evidence of Qualifications
   • Attachments 1-4, with original signatures
   • Certificate of Insurance
   • Proof of Authority
Vendor & Supplier Opportunities

http://minnstate.edu/vendors/index.html
Process Overview (continued)

### 3. Evaluation & Notification
- Instructions
- Pass: Receive
  - Attachment A Approved Specialty Services
  - Master Contract or Amendment
- Fail: Encouraged to resubmit next year

### 4. Master Contract
- Execute Master Contract (signed by all parties)
- Maintenance
# Schedule

<table>
<thead>
<tr>
<th>EVENT</th>
<th>DAY</th>
<th>DATE, 2021</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFQ Release Date</td>
<td>Tuesday</td>
<td>January 19</td>
<td></td>
</tr>
<tr>
<td>Voluntary Information Meeting</td>
<td>Thursday</td>
<td>January 28</td>
<td>10:00 am (CT)</td>
</tr>
<tr>
<td>Optional Preliminary Docs Due</td>
<td>Tuesday</td>
<td>February 9</td>
<td>2:00 pm (CT)</td>
</tr>
<tr>
<td>Receive Preliminary Comments</td>
<td>Friday</td>
<td>February 12</td>
<td></td>
</tr>
<tr>
<td>Final RFQ Questions Due</td>
<td>Friday</td>
<td>February 12</td>
<td>2:00 pm (CT)</td>
</tr>
<tr>
<td>Post Reponses to Questions</td>
<td>Tuesday</td>
<td>February 16</td>
<td></td>
</tr>
<tr>
<td><strong>RFQ Submittal Due</strong></td>
<td><strong>Tuesday</strong></td>
<td><strong>February 23</strong></td>
<td><strong>2:00 pm (CT)</strong></td>
</tr>
<tr>
<td>Evaluation of Submittals</td>
<td></td>
<td>March 9 – 18</td>
<td></td>
</tr>
<tr>
<td>Contract status notification by</td>
<td></td>
<td>March 19</td>
<td></td>
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<tr>
<td>Contract Originals Due</td>
<td></td>
<td>April 16</td>
<td>2:00 pm (CT)</td>
</tr>
<tr>
<td>Effective Date of Contract</td>
<td></td>
<td>May 1</td>
<td></td>
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</tbody>
</table>
How Campuses use Master Contracts

1. Determine minimum number of RFPs needed
   - Fees* 0-$50K Issue RFP to minimum of 1 firm
   - Fees* $50K-100K Issue RFP to minimum of 2 firms
   - Fees Over $100K FACPTMC can not be used
   *Fee includes reimbursable for travel and subsistence expenses

2. Choose consultants to be issued RFP by considering
   - Geographic area
   - Consultant specialty
   - TG/ED/VO preference
   - Firms that have not worked on the campus

3. Evaluate proposal against criteria and select consultant

4. Issue PO against Master Contract
   - Include attachments
   - Specific scope of work
Benefits to Master Contracting

• Increases the visibility of the consultant’s specialty services to the campuses
• Identifies consultants that meet minimum qualifications
• Improves communication with our consultants
• Improves master contract maintenance
• Reduces consultant work effort/time/expense
List of Specialty Services

- Architecture – Architectural Design
- Architecture - Comprehensive Facility Planning
- Architecture - Predesign
- Architecture – Wayfinding
- **Building Envelope – Energy Modeling**
  - Building Envelope - Exterior Wall
  - Building Envelope - Roofing
  - Building Envelope - Waterproofing
  - Building Envelope - Windows and Curtain Walls
- Commissioning - Mechanical
- Engineering - Civil
- Engineering - Electrical
- Engineering - Environmental
- Engineering - Fire Protection
- Engineering - Geotechnical
- Engineering - Mechanical
- Engineering - Structural
- Planning – Utility Master Planning
- Planning – Higher Education Analyst
- Industrial Hygiene - Asbestos Abatement Design
- Industrial Hygiene - Air Monitoring
- Industrial Hygiene - Indoor Air Quality
- Industrial Hygiene - Industrial Hygienist
- Industrial Hygiene - Lead Testing
- Inspections & Testing - Inspectors and Laboratories
- Interior Design
- Land Surveyor
- Landscape Architectural Design
- Owner's Representative
- Real Estate - Appraisals
- Real Estate Broker
- Technology - Audio and Visual
- Technology - Information and Data Networks
- Technology - Telecommunications and Voice
RFQ Submittal

**Required Forms**
- Transmittal
- Attachment 1
- Attachment 2
- Attachment 3
- Attachment 4

**Firm Information**
- Firm Registration
- Evidence of Qualifications
- Certificate of Insurance
- Proof of Authority
- Preferred Vendor
RFQ Submittal – Transmittal Form for New Consultants

- Verify all required items are included
- Edit red text and complete form
- Check all the Specialty Services included in Response, note total #
- Acknowledge all issued addenda
- Sign
- FIRMNAME_Transmittal.pdf
RFQ Submittal – Transmittal Form for Current Vendors

- Verify all required items are included
- Edit red text and complete form
- Check all the Specialty Services included in Response, note total #
- Acknowledge all issued addenda
- Sign
- FIRMNAME_Transmittal.pdf
RFQ Submittal – Electronic File naming convention

- FIRMNAME_Transmittal.pdf
- FIRMNAME_Registration.doc – WORD DOC
- FIRMNAME_EoQ_Specialty.pdf

Basic Contractual Requirements

- FIRMNAME_COI.pdf
- FIRMNAME_Attachment1.pdf
- FIRMNAME_Attachment2.pdf
- FIRMNAME_Attachment3.pdf
- FIRMNAME_Attachment4.pdf
- FIRMNAME_Authority.pdf
- FIRMNAME_PreferredVendor.pdf
RFQ Submittal – Firm Registration

- 1 per consultant regardless of number of Specialty Services
- Acknowledge Federal Tax Id number
- Refer to Frequently Asked Questions (FAQ) in addendum #1 for more information regarding Preferred Vendor Status
- Type all information
- FIRMNAME_Registration.doc

Instructions: Provide all the information requested below.

<table>
<thead>
<tr>
<th>Firm Information:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Firm Legal Name:</td>
</tr>
<tr>
<td>Firm DBA Name (doing business as):</td>
</tr>
<tr>
<td>Street Address:</td>
</tr>
<tr>
<td>Billing Address:</td>
</tr>
<tr>
<td>Website Address:</td>
</tr>
<tr>
<td>Main Business Phone:</td>
</tr>
<tr>
<td>Other office locations:</td>
</tr>
</tbody>
</table>

☐ CONSULTANT has a Federal tax identification number (check box to confirm)

☐ CONSULTANT is an individual (check if applicable)

Preferred Vendor Status: Place check below and attach evidence of firm status, if applicable.

☐ Targeted Group: ☐ Veteran Owned ☐ Economically Disadvantaged

Primary Contact: (Person managing master contract, signing for the firm, contact for system office)

<table>
<thead>
<tr>
<th>Full name:</th>
<th>Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email:</td>
<td>Phone:</td>
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</tbody>
</table>

Secondary Contact: (Alternate contact person, contact for campuses)

<table>
<thead>
<tr>
<th>Full name:</th>
<th>Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email:</td>
<td>Phone:</td>
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</tbody>
</table>
RFQ Submittal – Evidence of Qualifications

- 33 Specialties
- General Description of Responsibilities for each Specialty in RFQ

Minimum FAC P/T Consultant Criteria

- Refer to Appendix in RFQ for requirements for each Specialty Service

Evidence of Qualifications

- Must satisfy all minimum criteria
RFQ Submittal – Minimum FAC P/T MC Consultant Criteria

<table>
<thead>
<tr>
<th>Specialty Services</th>
<th>Credentials of Key Personnel</th>
<th>Years of Experience</th>
<th>Laboratory or Testing Service</th>
<th>Firm Project Experience – Projects must be completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architecture - architectural design</td>
<td>MN Licensed Architect</td>
<td>10 (ten) years</td>
<td>None.</td>
<td>3 (three) projects with a state or local government or higher education institution.</td>
</tr>
<tr>
<td>Architecture - comprehensive facility planning</td>
<td>MN Licensed Architect</td>
<td>10 (ten) years</td>
<td>None.</td>
<td>3 (three) comprehensive facilities plans (master plans) with a state or local government or higher education institution <strong>completed since January 1, 2011.</strong></td>
</tr>
<tr>
<td>Architecture - predesign</td>
<td>MN Licensed Architect</td>
<td>10 (ten) years</td>
<td>None.</td>
<td>3 (three) projects with a state or local government or higher education institution. Municipal, corporate, or other relevant design experience may be considered.</td>
</tr>
</tbody>
</table>

- Lists the minimum requirements for the Specialty Service
- A minimum of one (1) appropriately credential individual is required per Specialty Service
- **MN License #’s and discipline must be included**
- Note the required minimum number and type of project
RFQ Submittal – Evidence of Qualifications

- Include individuals who will be responsible for leading projects or managing contracts
- A minimum of one (1) appropriately credential individual is required per Specialty Service
- MN License #'s must be included
- Laboratory service may be either in-house or sub-contracted
- FIRMNAME_EoQ_Specialty.pdf
- No opportunity to clarify or resubmit after RFQ due date
RFQ Submittal – Evidence of Qualifications – Changes in Key Personnel

<table>
<thead>
<tr>
<th>Key Personnel:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>------</td>
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<td></td>
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</tbody>
</table>

- Minimum of 1, may list up to 5
- **Must** include MN professional license number and discipline.
- If the firm loses the one and **only** Key Personnel for that Specialty Service, then notify Minnesota State at [FACPTMC@minnstate.edu](mailto:FACPTMC@minnstate.edu)
RFQ Submittal – Evidence of Qualifications

Evidence of Qualifications
Facilities Professional / Technical Consultant Master Contract

**Specialty:**

**Firm Name:**

**Instructions:** See RFQ attachment Minimum FAC P/T MC Consultant Criteria for requirements. List Minnesota State Colleges and Universities experience first, then state or local government, then other relevant experience. Do not attach additional sheets or insert pictures. Use 10pt font minimum. List only those projects which are completed. A “project” is defined as a separate contract or purchase order for a specific scope of work. All fields must be completed.

*Vendors are encouraged to submit up to five projects even if only three are required to meet the minimum qualifications.*

Provide a general description of the firm’s project responsibilities and list tasks accomplished for the scope of work. Brief examples can be found in the RFQ, Section IV, Specialty Services and Responsibilities and also under part A. General Scope of Work by Project Phase (pages 8 through 14).

<table>
<thead>
<tr>
<th>Firm Project Experience:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Number</strong></td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
</tbody>
</table>

- Projects must be **completed, list month and year**
- Consultant must have the contract with the owner – not a sub-consultant
- No dollar or size (sqft) threshold
- Only include firm project experience
- EoQ’s may not be resubmitted after RFQ due date.
RFQ Submittal – Evidence of Qualifications

Vendors are encouraged to submit up to five projects even if only three are required to meet the minimum qualifications.

Provide a general description of the firm’s project responsibilities and list tasks accomplished for the scope of work. Brief examples can be found in the RFQ, Section IV. Specialty Services and Responsibilities and also under part A. General Scope of Work by Project Phase (pages 8 through 14).

Firm Project Experience:

<table>
<thead>
<tr>
<th>Project Number</th>
<th>Project Name</th>
<th>Project Location</th>
<th>Project completion date: Month, Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Owner</td>
<td>Owner Contact name</td>
<td>Owner Contact phone or email</td>
</tr>
</tbody>
</table>

- Include as many of the responsibilities from the general description of the Specialty Service as applicable
- Include as many of the specific tasks from the general scope of work as applicable – Refer to the example in the RFQ.
- If unsure if a project qualifies, list up to five
General description of responsibilities and tasks:

We designed a new geothermal heat pump loop system for the project. Our scope of work included providing site civil work and preparation for the geothermal borings as well as an entirely new heating and cooling system as the facilities existing infrastructure had reached end of useful life. Mechanically, the HVAC units were replaced, a new high efficiency boiler was installed, and a water to water geothermal heat pump skid was installed, in addition to demolition of the existing equipment. The new design was based on updating the pre-design to meet the requirements of the project and updating the cost estimate accordingly. The majority of the controls were specified to be integral to the new equipment, with a small amount of control interface with the existing controls system. The design followed the Minnesota State Design Standards throughout all phases of design, including drawings, calculations, and specifications. The electrical design required some distribution upgrades and main breaker replacements at the switchboards. We uploaded relevant documents and used appropriate e-Builder workflows.

- Fully describes design scope
- Summarizes deliverables
- Meets Owner standards and requirements
RFQ Submittal – OPTIONAL EoQ Preliminary Review

If new consultants are unsure about completing the Evidence of Qualifications, here’s how we can help:

• Email us a DRAFT of your EoQ(s) by February 9
  FACPTMC@Minnstate.edu

• We will review and offer suggestions for improvement by February 12
RFQ Submittal – Attachments 1-4

Please complete and send with original signatures in blue ink:

- Attachment 1 – Certification Regarding Lobbying
- Attachment 2 – Workforce Certification
- Attachment 3 – Affidavit of Non-Collusion
- Attachment 4 – Equal Pay Certificate

Forms are provided in the Appendix for your use
RFQ Submittal – Proof of Authority

Typical examples are:

• Letter on company letterhead
• Articles of incorporation excerpt
• Firm by-laws excerpt
• Firm resolutions

A standard form is not provided.
After the Evaluations

• Status notification will be emailed by March 19, 2021 indicating:
  • If Passed, receive:
    – Instructions for final processing with request for additional information if applicable
  • If Failed all Specialties, receive:
    – Rejection Letter
    – Encouraged to resubmit next year
Master Contract Execution via Docusign

Consultant next steps:
• Submit any additional requested information by the Contract Original Due date
• Verify name, email address and title of individual signing contract
Master Contract - Maintenance

• Notify Minnesota State at FACPTMC@minnstate.edu any time the following changes:
  – Updates to Firm Registration
    • Primary and Secondary contact information must be current
  – Updates to Certificates
    • Equal Pay
    • Workforce Certification
  – The “One and Only” Key Personnel for Specialty Service is no longer with the firm.
Master Contract - Maintenance

• Changes that require a contract amendment:
  – Adding a new Specialty Service
    • Reviewed when RFQ is re-opened on an annual basis
    • Must meet the requirements of the current RFQ
Future Program Changes

• The majority of contracts will expire on May 31, 2022
• We anticipate significantly changing the master contracting program
• It is possible that master contracts executed this year may only be used one year.
**Tips for Success**

- Use the Transmittal Form as a checklist
- Submit all items on time
- Rename electronic files as recommended in response
- Meet the minimum criteria for each Specialty Service
  - Provide relevant information for evaluation
  - Submit up to five projects (*even if only 3 are required*)
- Carefully review your Certificate of Insurance
  - Meet the minimum requirements
  - Ensure policies do not expire before February 23, 2021
  - If insurance expires before May 1, 2021, then resubmittal of COI is required with contract.
Other P/T Consultant Opportunities

• Invited Request
  – Used for simple services less than $50,000
  – RFP is issued to minimum of 2 consultants

• State Designer Selection Board (SDSB)
  – Used for selection of Architect/Engineer for GO funded capital projects over $2 million or fees over $200,000
  – Public RFP is posted in State Register

• Public solicitation
  – Used for any solicitation
  – Public RFP/RFQ is posted on Minnesota State website

See “Opportunities to Work with Minnesota State” white paper at http://www.minnstate.edu/system/finance/facilities/design-construction/index.html
QUESTIONS?

Please use the chat function to submit a question to the presenter.

Continue to keep your computer and phone on mute.
Thank you for your interest in working with Minnesota State!

- This presentation will be included as an attachment to Addenda #1 posted at RFQ webpage site http://www.minnstate.edu/vendors/index.html

- Questions must be emailed to FACPTMC@minnstate.edu.
  - Questions must be received no later than 2:00 pm on Friday, February 12, 2021
  - Responses will be posted in addenda by Tuesday, February 16, 2021.