



Request for Qualifications
 Solicitation No.
ADSP018-00007887
 Description:
2018 Professional Services List

Arizona Department of
 Administration
State Procurement Office
 100 N 15th Ave., Suite 201
 Phoenix, AZ 85007

Offer Forms
(Attachments)
 Date: [January 8, 2018](#)

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Attachment 1
Offer and Acceptance Form

SUBMISSION OF OFFER: Undersigned hereby offers and agrees to provide qualifications for 2018 Annual Professional Services List in compliance with the Solicitation indicated above and our Offer indicated by the latest dated version below:

Initial Offer:	1.	01/23/2018	
	date		initial

Abacus Project Management, Inc.

Offeror company name

3030 N. Central Ave., Ste. 803

Address

Phoenix, AZ 85012

City | State | ZIP

86-0671247

Federal tax identifier (EIN or SSN)

Adam Brill

Signature of person authorized to sign Offer

AFB

Initials

Adam Brill, Director / Manager of Arizona Operations

Printed name and title

Adam Brill, Director / Manager of Arizona Operations

Contact name and title

Adam.Brill@AbacusPM.com 602-282-8860

Contact Email Address

Contact phone number

CERTIFICATION: By signature in the above, Offeror certifies that it:

- will not discriminate against any employee or applicant for employment in violation of Federal Executive Order 11246, [Arizona] State Executive Order 2009-9 or A.R.S. §§ 41-1461 through 1465;
- has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted offer. Failure to provide a valid signature affirming the stipulations required by this clause will result in rejection of the Offer. Signing the Offer with a false statement will void the Offer, any resulting contract, and may be subject to legal penalties under law;
- complies with A.R.S. § 41-3532 when offering electronics or information technology products, services, or maintenance; and
- is not debarred from, or otherwise prohibited from participating in any contract awarded by federal, state, or local government.

ACCEPTANCE OF OFFER: State hereby accepts the initial Offer, Revised Offer, or Best and Final Offer identified by number ADSP018-00007887 at the top of this form, and which was dated 1/23/18 (the Accepted Offer). Offeror is now bound (as Contractor) to carry out the Work under the attached Contract, of which the Accepted Offer forms a part. Contractor is cautioned not to commence any billable work or to provide any material or perform any service under the Contract until Contractor receives the applicable Order or written notice to proceed from Procurement Officer.

State's Contract No. is: **ADSP018-00007887** The effective date of the Contract: 1/30/18-1/30/19 Contract awarded: 1/30/18

Sean Wulfekuhle
Procurement Officer signature

Sean Wulfekuhle
Procurement Officer printed name

Contract qualification award can be viewed at <https://spo.az.gov/procurement-services/professional-services>



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Attachment 2-A
Experience and Capacity

STATE MAY DETERMINE YOUR SUBMITTAL IS NON-RESPONSIVE IF YOU DO NOT ANSWER ALL QUESTIONS FULLY.

1.0 Five (5) Example Projects

List no more than five (5) example projects which best illustrate firm's qualification for this contract in the chart provided below. Select projects where multiple team members worked together, if possible, that demonstrate the team's capability to perform work similar to that required for this qualifications list contract. (NOTE: The integrity of the chart table columns shall remain unchanged, however the rows for each project may be expanded by the Offeror to accommodate the information).

- a. Title and Locations of project or contract. For an indefinite delivery contract, the location is the geographic scope of the contract.
- b. Enter the year completed of the professional services (such as planning, engineering study, or design), and/or the year completed if construction. If any of the professional services or the construction projects are not complete, leave Year Completed blank and indicate the status in Brief Description of Project and Relevance to This Contract (block f).
- c. Project Owner or user, such as a government agency or installation, an institution, a corporation or private individual.
- d. Provide the original budget or not to exceed dollar amount for the project.
- e. Provide the Total Cost of the Project. If any of the professional services or construction projects is not complete, indicate the percentage complete and whether this project will be on budget, over or under budget.
- f. Brief Description: Indicate scope, size, and length of project, principle elements and special features of the project. Discuss the relevance of the example project to this contract.

Title and Location of Project	Design Completion Year	Construction Completion Year	Project Owner	Project Original Budget (or not to exceed amount)	Total Cost of the Project	Brief Description of Project
Arizona Department of Administration Facility Condition Assessments – Phoenix and Tucson, Arizona	2016		Arizona Department of Administration	\$388,600 (Abacus fee)	\$388,600 (Abacus fee)	Provided facility condition assessments for State owned buildings. In total the team assessed over 3.5M square feet of building space and helped to identify deficient building conditions in terms of deferred maintenance, capital repair, building life and safety non-compliance and functional adequacy to meet institutional objectives.



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Town of Marana New Police Building – Marana, Arizona	2017		Town of Marana	\$18,000,000 (Total project budget)	Construction underway, anticipated completion August 2018	New two-story police facility totaling approximately 45,000 square feet. The Town hired Abacus to serve as their Project / Construction Manager. In this capacity, Abacus is serving as an extension of the Town's staff to help insure the project is delivered within the approved parameters of scope, schedule and budget.
Salt River Project PERA Campus Improvements – Tempe, Arizona			Salt River Project	\$14,750,000 (Total project budget)	Currently in Schematic Design	Abacus is providing full scope Project Management / Construction Management services to construct two new facilities for Salt River Project (SRP). The new facilities will include a PERA Training and Innovation Center (PTIC) as well as a Skills Training Facility. The PTIC will be approximately 35,000 square feet and will be the primary location for SRP's employee training. In addition to training space, the PTIC will also include a fitness center and a banquet hall for SRP and SRP employee usage. The Skills Training Facility will include an outdoor site training area, indoor training rooms, classrooms and administrative spaces. Abacus is providing assistance



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						with a full evaluation of existing facilities and usages as well as with site analysis and planning for the new facilities. The full scope of the program to best fit SRP's needs will be defined once this process is complete.
Town of Gilbert Heritage Trail Middle Segment – Gilbert, Arizona		2017	Town of Gilbert	\$1,053,000 (Construction value)	\$1,053,000 (construction value)	This project consisted of multi-model canal trail improvements within the Town of Gilbert from the Western Canal south to Warner Road. Improvements include landscape, concrete pathway for walkers and cyclists with decomposed granite shoulders (for horses and runners), rest areas, traffic signals and signage. The project was delivered via design / bid / build. On behalf of the Town, Abacus provided on-site construction management services, construction observations, conducted weekly coordination meetings with Contractor, Architect and Town, managed the construction budget and schedule, coordinated required testing and inspection, assisted with close out, and various other construction phase



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						activities.
Arizona Department of Juvenile Corrections – Phoenix, Arizona	2017		Arizona Department of Juvenile Corrections	\$56,228 (Abacus fee)	\$56,228 (Abacus fee)	This project consisted of detailed and targeted condition assessments of several Arizona Department of Juvenile Correction facilities totaling more than 225,000 square feet. The data provided by these comprehensive assessments helped to identify deficient conditions in terms of deferred major maintenance, capital repair, building life and safety code non-compliance, and functional adequacy to meet institutional objectives.

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Attachment 2-A
Experience and Capacity

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2.0 EMPLOYEES BY DISCIPLINE

a. Discipline Title	b. Function: Primary (P) or Secondary (S)	c. No. of Employees Firm	d. No. of Employees Branch
Construction Manager	P	4	1 – Phoenix 3 – Newport Beach
Construction Manager	S	11	4 – Phoenix 7 – Newport Beach
Cost Engineer / Estimator	P	2	2 – Phoenix
Cost Engineer / Estimator	S	2	2 – Phoenix
Project Manager	P	11	4 – Phoenix 7 – Newport Beach
Project Manager	S	2	1 – Phoenix 1 – Newport Beach
Total		32	

3.0 FIRMS EXPERIENCE AND REVENUE

- a. Firm shall complete the document titled “Project Experience Number of Projects and Revenue”, using same document title and upload in .pdf format only as an “Attachment” with firm’s offer in ProcureAZ.

4.0 FIRMS SERVICES

- a. Firm shall complete the Excel spreadsheet titled “**2018 Professional Services List of Firms Services**” using same document title and uploaded in Excel format only as an “Attachment” with firm’s offer in ProcureAZ.



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5.0 EXPERIENCE REFERENCES:

THE PRIME FIRM SHALL LIST A TOTAL OF THREE (3) CLIENT REFERENCES FOR ANY PROJECTS COMPLETED IN THE LAST YEAR BY THE FIRM (OR A BRANCH LOCATION). REFERENCES MAY BE CONTACTED BY ANY ELIGIBLE AGENCY.

1	Client Company/Address	Contact	Begin Date	End Date
	Arizona Department of Administration	Ruben Duran	2016	2016
	Phone Number	Email Address		
	602-364-4821	Ruben.duran@azdoa.gov		
<p>List project name, project location, original design fee, final design fee, construction costs (if applicable), and program facilities (What were the uses, facilities, or activities that were built. For example; lift station, parking lot, bridge, playground, sewerage treatment plant, storm drainage, etc.).</p> <p>Facility Condition Assessment projects – Phoenix and Tucson, AZ: original / final fee for assessment services - \$388,600. Construction costs – N/A.</p> <p>Services performed similar to those described in Solicitation</p> <p>Assessment of 3.5M SF of building space including 49 buildings in the Phoenix area and 5 in Tucson.</p>				
2	Client Company/Address	Contact	Begin Date	End Date
	Town of Marana	Jennifer Christelman	2016	Ongoing
	Phone Number	Email Address		
	x	x		
<p>List project name, project location, original design fee, final design fee, construction costs (if applicable), and program facilities (What were the uses, facilities, or activities that were built. For example; lift station, parking lot, bridge, playground, sewerage treatment plant, storm drainage, etc.).</p> <p>Town of Marana New Police Facility – Marana, AZ: Original fee for PM/CM services - \$683,111. Final fee for PM/CM services – to be determined. Original Construction Costs - \$17,407,842. Final Construction Costs – to be determined.</p> <p>Services performed similar to those described in Solicitation</p> <p>Project / Construction Management services, serving as an extension of the Town’s staff to help insure the project is delivered within the approved parameters of scope, schedule and budget.</p>				
3	Client Company/Address	Contact	Begin Date	End Date
	Architekton	Joe Salvatore	2001	Ongoing
	Phone Number	Email Address		
	480-894-4637	joesalvatore@architekton.com		



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List project name, project location, original design fee, final design fee, construction costs (if applicable), and program facilities (What were the uses, facilities, or activities that were built. For example; lift station, parking lot, bridge, playground, sewerage treatment plant, storm drainage, etc.).

Numerous projects within the Phoenix area and throughout Arizona. Projects have included recreational facilities, police facilities, public safety facilities, libraries, court facilities, educational facilities and mixed use facilities.

Services performed similar to those described in Solicitation

Detailed cost estimating services; contractor bid / GMP review, validation and negotiations; value engineering.

End of Attachment 2-A



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Attachment 2-B
Organization Profile

STATE MAY DETERMINE YOUR PROPOSAL IS NON-RESPONSIVE IF YOU DO NOT ANSWER ALL QUESTIONS FULLY.

ORGANIZATION PROFILE

The firm shall complete a separate Organizational Profile document for each branch office.

Firm Name	Abacus Project Management, Inc.		Year established	1990
Principal address (street, city, state)	3030 N. Central Ave., Ste. 803, Phoenix, AZ 85012			
Entity type:	Corporation	Structure:	S Corporation	
Branch or Division:	Phoenix Office	Parent Company:	N/A	
Years the organization has conducted business in Arizona.				<input checked="" type="checkbox"/>
Contract Representatives to Contact				
	Name	Title	Telephone Number	E-Mail Address
1	Adam Brill	Director / Manager of Arizona Operations	602-282-8860	Adam.Brill@AbacusPM.com
2	Russell Thompson	Managing Principal	949-864-2909	Russell.Thompson@AbacusPM.com
3	Jose Gonzalez	Accounting & Finance Director	602-282-8862	Jose.Gonzalez@AbacusPM.com
Firm Professional Registration and Certifications (INCLUDE COPY OF DOCUMENT IN OFFER)				
	Description	Issuer	Number	Expiration
1	Arizona Board of Technical Registration – Richard Carr	State of Arizona	28977	03/31/2019
2	Arizona transaction privilege tax license or (if applicable) Arizona Corporate Commission Certificate of Good Standing	State of Arizona	07-418536-B	n/a
3	B-01 General Commercial	Arizona Registrar of Contractors	991022	08/31/2018

PART 4 of the Solicitation Documents:
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4	A – General Engineering	Arizona Registrar of Contractors	270379	01/31/2019
5	Transaction Privilege Tax	Arizona Department of Revenue	07-418536-B	n/a

ATTACHMENT 2-B SUPPLEMENTS:

(For submission of additional Organizational Profile qualifications beyond the number of forms provided in the Offer Documents: Offeror shall copy the Organizational Profile form in its entirety and complete in a separate Document for submission with the offer or type “None” on first line if not applicable. Offeror shall title Supplement(s) with the same beginning title as named herein, number sequentially in accordance with the number of Organizational Profile forms submitting and upload with offer.)

	Title	Document Date	No. of pages	Purpose in Offer
6.	None	x	x	

(NOTE: The Offeror may insert additional rows as required).

End of Attachment 2-B



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Attachment 3-A
Method Proposal
(Method of Approach)

RESERVED FOR AWARDED DESIGN PROFESSIONAL UPON SERVICE REQUEST

End of Attachment 3-A

PART 4 of the Solicitation Documents:
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Attachment 3-B
Key Personnel Proposal

1	Name:	Adam Brill	How long with company?	19 years
	Current position in company:	Director / Manager of AZ Operations	How long in position?	8 years
	Position for the Services:	Director	How much of time will be dedicated to the Services?	30 %
	What primary functions will be assigned?	As Director, Adam will be the main point of contact for Agencies desiring to utilize our services through the Professional Services List. He will assign staff based on the specific projects and our staff's qualifications, expertise and availability. Additionally, he will be responsible for oversight of all Abacus team members in the performance of our services.		
	Describe person's experience in performing services like those that are to be assigned:	<p>As Director, Adam has provided functions similar to those noted in the above section for 8+ years. He's been involved with contract coordination; assigning and overseeing Abacus' project management and cost estimating teams and; assuring client satisfaction on numerous projects including, but not limited to the following:</p> <ul style="list-style-type: none"> • Arizona Department of Administration - Facility Condition Assessments • Arizona Department of Juvenile Corrections - Facility Condition Assessments • Salt River Project PERA Campus Improvements (PM/CM) • Town of Marana – New Police Facility (PM/CM) • Town of Gilbert – Saint Xavier University (PM/CM) • Town of Gilbert – Heritage Trail (PM/CM) • City of El Paso – Three New Community Center Projects (PM/CM) • Phoenix Sky Harbor Int'l Airport – Command Center (Cost Estimating) • Phoenix Sky Harbor Int'l Airport – Terminal 4 Terrazzo Floor Replacement (Cost Estimating) • City of Goodyear – New Police Operations Facility (Cost Estimating) • City of Phoenix – Neighborhood Services Department Projects (Cost Estimating) • City of Maricopa – New City Hall Complex (PM/CM) • City of Maricopa – New Multigeneration Center & Swim Facility (PM/CM) • City of Maricopa – New Regional Park (PM/CM) 		
	List person's job-related training and education:	Bachelor of Architecture – University of Detroit Executive Management Program (PMP) – Georgetown University LEED Accredited Professional 23+ years experience		
	Resume:	n/a		

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2	Name:	Richard (Rick) Carr	How long with company?	6 years
	Current position in company:	Senior Project Manager	How long in position?	6 years
	Position for the Services:	Senior Project Manager	How much of time will be dedicated to the Services?	30 %
	What primary functions will be assigned?	<p>Rick will provide project / construction management services on any project assigned. This could include assistance with programming and pre-design activities; assistance with architectural / contracting teams; design phase coordination; budgeting; scheduling; executive / project reporting; coordination / monitoring of RFI's and Submittals; field observations; conducting and documenting meetings throughout design and construction and various other activities required to manage our client's project in order to achieve timely completion within budget.</p>		
	Describe person's experience in performing services like those that are to be assigned:	<p>Rick is a Registered Architect with 25 years of experience providing design and construction services for a variety of clients throughout Arizona. As a Senior Project Manager with Abacus Rick has been providing services similar to those noted in the above section for the past 5 years. He has been involved with a number of successful projects for Abacus including the following:</p> <ul style="list-style-type: none"> • Town of Marana – New Police Facility • Town of Gilbert – Saint Xavier University • Arizona Department of Administration - Facility Condition Assessments • City of El Paso – Three New Community Center Projects • City of Maricopa – New City Hall Complex • City of Maricopa – New Multigeneration Center & Swim Facility • City of Maricopa – New Regional Park • Tolleson Elementary School District – Various Bond / Renovation Projects • San Diego State University - Parking Structure Assessments 		
	List person's job-related training and education:	<p>Bachelor of Science, Design – Arizona State University Licensed Architect – AZ No. 28977 LEED Accredited Professional 26 years experience</p>		
	Resume:	n/a		



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3	Name:	Diego Toledo	How long with company?	4 years
	Current position in company:	Project Manager / Cost Estimator	How long in position?	4 years
	Position for the Services:	Project Manager / Cost Estimator	How much of time will be dedicated to the Services?	70 %
	What primary functions will be assigned?	<p>Diego will be available to provide project / construction management services on any project assigned. His assistance could include design phase coordination; budgeting; scheduling; coordination / monitoring of RFI's and Submittals; field observations; conducting and documenting meetings throughout design and construction and various other activities required to manage our client's project in order to achieve timely completion within budget. Diego will additionally be available to provide cost estimating support as needed.</p>		
	Describe person's experience in performing services like those that are to be assigned:	<p>Diego has been providing project management and cost estimating services as part of Abacus' team for over 4 years. His project involvement has included the following:</p> <ul style="list-style-type: none"> • Arizona Department of Juvenile Corrections – Facility Condition Assessments • Town of Gilbert – Heritage Trail (PM/CM Services) • Phoenix Sky Harbor Int'l Airport – Command Center (Cost Estimating) • Broadstone Fashion Center Apartments (Construction Observations) • Town of Marana – New Police Facility (PM/CM Support Services) • City of El Paso – Three New Community Centers (PM/CM Support Services) • City of Glendale – Western Area Branch Library (Cost Estimating) • Arizona Department of Administration – Facility Condition Assessments • San Diego State University – Parking Lot Assessments • San Diego State University – Parking Structure Assessments • Salt River Project – Crosscut Facility Renovations (Cost Estimating) 		
	List person's job-related training and education:	<p>Harper College C++ Programmer, E.S.P.E. (Quito, Ecuador) Computer Software Studies, E.S.P.E. (Quito, Ecuador) OSHA 30 Certified 30-Hour Construction Industry Outreach Training Course</p> <p>5 years experience</p>		
	Resume:	n/a		



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4	Name:	Leonardo (Leo) Alonso	How long with company?	5 years
	Current position in company:	Senior Project Manager	How long in position?	5 years
	Position for the Services:	Senior Project Manager	How much of time will be dedicated to the Services?	70%
	What primary functions will be assigned?	<p>Leo will provide project / construction management services on any project assigned. This could include assistance with programming and pre-design activities; assistance with architectural / contracting teams; design phase coordination; budgeting; scheduling; executive / project reporting; coordination / monitoring of RFI's and Submittals; field observations; conducting and documenting meetings throughout design and construction and various other activities required to manage our client's project in order to achieve timely completion within budget.</p>		
	Describe person's experience in performing services like those that are to be assigned:	<p>Leo's project experience includes the following:</p> <ul style="list-style-type: none"> • Salt River Project PERA Campus Improvements • AIG Tamal Vista Project (Scheduling Support) • Carty Generating Station Pre-Engineered Metal Building Program (Design/Build Services) • Solana Solar Generating Plant Pre-Engineered Metal Building Program (Design/Build Services) • Hugoton Second Generation Biomass Ethanol Plant Pre-Engineered Metal Building Program (Design/Build Services) • Mohave Solar Motor Control Center Room (Design/Build Services) 		
	List person's job-related training and education:	<p>Project Management Certificate Program – Santa Clara University School of Architecture – UDELAR, Uruguay</p> <p>27 years experience</p>		
	Resume:	n/a		



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5	Name:	Larry Brown	How long with company?	18 years
	Current position in company:	Senior Cost Estimator	How long in position?	18 years
	Position for the Services:	Senior Cost Estimator	How much of time will be dedicated to the Services?	100% when needed
	What primary functions will be assigned?	Larry will provide detailed cost estimating services throughout all phases of design. Additionally, he is available to provide review / validation and negotiation of contractor bids / GMP proposals; review and validation of change orders; life cycle cost analysis and; value engineering support.		
	Describe person's experience in performing services like those that are to be assigned:	<p>Larry has been providing cost estimating support as described above for nearly 35 years. directly responsible for the management, estimation and completion of more than 350 projects with a combined construction value over \$4 billion. His experience includes new construction and renovation/addition of both public and private construction projects including, but not limited to; Office Buildings, Office Tenant Improvements, Industrial Buildings, Educational Facilities, Airport Facilities, Native American Housing and Medical Facilities, Private Country Clubs, Athletic Facilities and Parking Structures to name a few. Larry's project involvement spans through all phases of estimating including; conceptual, programming, schematic, design development and construction documents. His qualifications include the ability to itemize complete structural and architectural takeoffs. A few examples of his project experience include:</p> <ul style="list-style-type: none"> • Phoenix Sky Harbor Int'l Airport – Command Center (Cost Estimating) • Phoenix Sky Harbor Int'l Airport – Terminal 4 Terrazzo Floor Replacement (Cost Estimating) • City of Goodyear – New Police Operations Facility (Cost Estimating) • City of Phoenix – Neighborhood Services Department Projects (Cost Estimating) • City of Maricopa – Copper Sky Police Station (Cost Estimating) • Arizona Department of Administration – Facility Condition Assessments (Cost Estimating) • Arizona Department of Juvenile Corrections – Facility Condition Assessments (Cost Estimating) • Salt River Project PERA Campus Improvements (Cost Estimating) 		
	List person's job-related training and education:	<p>Accounting Courses – Arizona State University Associate Degree – Glendale Community College LEED Accredited Professional ASPE Chapter 6 – Member</p> <p>33 years experience</p>		
	Resume:	n/a		



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6	Name:	George Dubois	How long with company?	1 years
	Current position in company:	Cost Estimator	How long in position?	1 years
	Position for the Services:	Cost Estimator	How much of time will be dedicated to the Services?	100% when needed
	What primary functions will be assigned?	George will provide detailed cost estimating services throughout all phases of design. Additionally, he is available to provide review / validation and negotiation of contractor bids / GMP proposals; review and validation of change orders; life cycle cost analysis and; value engineering support.		
	Describe person's experience in performing services like those that are to be assigned:	<p>George has over 38 years experience in the construction industry, including over 27 years in estimating. He has provided estimating services for a variety of educational, municipal / civic and other public works projects. He is skilled in dealing with Owners, Architects, cost reports, change orders, scheduling and contract administration. Project examples include:</p> <ul style="list-style-type: none"> • Salt River Pima-Maricopa Indian Community Cultural Repository • Salt River Pima-Maricopa Indian Community Evidence & Storage Facility • City of Eloy City Hall • City of El Paso Chamizal Community Center • City of El Paso Lomaland Community Center • Town of Queen Creek West Park • Austin-Bergstrom Int'l Airport New Parking Garage and Administration Building • City of Tempe Public Library Renovations • City of Tempe Johnny G. Martinez Water Treatment Plant Expansion and Remodel 		
	List person's job-related training and education:	Dunwoody Industrial Institute - Architectural Drafting & Estimating 38 years experience		
	Resume:	n/a		

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ATTACHMENT 3-B SUPPLEMENTS:

(For submission of additional Key Personnel qualifications beyond the number of forms provided in the Offer Documents: Offeror shall copy the Key Personnel Form in its entirety and complete in a separate Word Document for submission with the offer, and list file name below or type "None" on first line if not applicable. Offeror shall title Supplement(s) with the same title as named herein and upload with offer.).

	Title	Document Date	No. of pages	Purpose in Offer
1.	None	x	x	

(NOTE: The Offeror may insert additional rows as required).

End of Attachment 3-B



Request for Qualifications
 Solicitation No.
ADSP018-00007887
 Description:
2018 Professional Services List

Arizona Department of
 Administration
State Procurement Office
 100 N 15th Ave., Suite 201
 Phoenix, AZ 85007

Attachment 3-C
Proposed Subcontractors

RESERVED FOR AWARDED DESIGN PROFESSIONAL UPON SERVICE REQUEST

Check "NO" if you WILL NOT subcontract any portion of the Work and will therefore be carrying out all of the Work with your own personnel.

<input type="checkbox"/>	NO, the Offeror will not subcontract any portion of the Work.
--------------------------	---

If you WILL subcontract any portion of the Work, check "YES" below and list name of persons or companies you propose to use as subconsultants.

1. Fill in the information in the chart below for every proposed subcontractor – indicate the role and services work the subconsultant may provide in performing any of the services as outlined in the Requirements Document in the solicitation.
2. Offeror shall complete an Attachment 3-B Key Personnel Form in its entirety for each proposed subcontractor and submit with offer. The term "Subconsultant" shall be annotated in parenthesis after each subcontractor key personnel name typed in the "Name" section of the 3-B form.
3. State may demand additional information about proposed subcontractors as a precondition of award.

<input type="checkbox"/>	YES, the Offeror will use the Subcontractors listed below:
--------------------------	--

	Subcontractor Key Personnel Name; Subcontractor Firm Name and Contact Information	List Proposed Subcontractor Role(s) and Services	Capacity % Dedicated to Perform the Proposed Role/Service For Any Project Under This Contract
1.	Name		
2.	Name		
3.	Name		
4.	Name		
5.	Name		
6.	Name		
7.	Name		
8.	Name		
9.	Name		
10.	Name		



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ATTACHMENT 3-C SUPPLEMENTS:

(Offeror to insert as required and list here or type "None" on first line. Offeror shall title any Supplement(s) with the same title as named herein and upload with offer.)

	Title	Document Date	No. of pages	Purpose in Offer
1.	Enter or type "None for Sub #1"	x	x	x
2.	Enter or type "None for Sub #2"	x	x	x
3.	Enter or type "None for Sub #3"	x	x	x
4.	Enter or type "None for Sub #4"	x	x	x
5.	Enter or type "None for Sub #5"	x	x	x
6.	Enter or type "None for Sub #6"	x	x	x
7.	Enter or type "None for Sub #7"	x	x	x
8.	Enter or type "None for Sub #8"	x	x	x
9.	Enter or type "None for Sub #9"	x	x	x
10.	Enter or type "None for Sub #10"	x	x	x

End of Attachment 3-C



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Attachment 3-D
Performance Guarantee

RESERVED FOR AWARDED DESIGN PROFESSIONAL UPON SERVICE REQUEST

End of Attachment 3-D

PART 4 of the Solicitation Documents:
Offer Forms (Attachments)

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Attachment 4
Pricing Sheet

RESERVED FOR AWARDED DESIGN PROFESSIONAL SERVICE ORDER CONTRACT

End of Attachment 4

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Attachment 5-A
Confidential Information Designation

All materials submitted as part of a response to a solicitation are subject to Arizona public records law and will be disclosed if there is an appropriate public records request at the time of or after the award of the contract.

Recognizing there may be materials included in a solicitation response that are proprietary or a trade secret, a process is set out in A.A.C. R2-7-103 (copy attached) that will allow qualifying materials to be designated as confidential and excluded from disclosure. For purposes of this process the definition of "trade secret" will be the same as that set out in A.A.C. R2-7-101(52).

Complete this form return it with your Offer along with the appropriate supporting information to assist State in making its determination as to whether any of the materials submitted as part of your Offer should be designated confidential because the material is proprietary or a trade secret and therefore not subject to disclosure.

STATE WILL NOT CONSIDER ANY MATERIAL IN YOUR OFFER "CONFIDENTIAL" UNLESS DESIGNATED ON THIS FORM.

Check one of the following – if neither is checked, State will assume that as equivalent to "DOES NOT":

<input checked="" type="checkbox"/>	This response DOES NOT contain proprietary or trade secret information. I understand that my entire response will become public record in accordance with A.A.C. R2-7-C317.
<input type="checkbox"/>	This response DOES contain trade secret information because it contains information that: <ol style="list-style-type: none"> 1. Is a formula, pattern, compilation, program, device, method, technique or process, AND 2. Derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use; AND 3. Is the subject of efforts by myself or my organization that are reasonable under the circumstances to maintain its secrecy.


NOTE: Failure to attach an explanation may result in a determination that the information does not meet the statutory trade secret definition. All information that does not meet the definition of trade secret as defined by A.A.C. R2-7-101(52) will become public in accordance with A.A.C. R2-7-C317. State may make its own determination on materials in accordance with A.A.C. R2-7-103.

If State agrees with Offeror's designation of trade secret or confidentiality and the determination is challenged, the undersigned hereby agrees to cooperate and support the defense of the determination with all interested parties, including legal counsel or other necessary assistance.

By submitting this response, Offeror agrees that the entire Offer, including confidential, trade secret and proprietary information may be shared with an evaluation committee and technical advisors during the evaluation process. Offeror agrees to indemnify and hold State, its agents and employees, harmless from any claims or causes of action relating to State's withholding of information based upon reliance on the above representations, including the payment of all costs and attorney fees incurred by State in defending such an action.

Abacus Project Management, Inc.

Offeror Company Name
3030 N. Central Ave., Ste. 803
Address


Signature of Authorized Person
Adam Brill
Printed Name

PART 4 of the Solicitation Documents:
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Phoenix, AZ 85012

Director / Manager of Arizona Operations

City	State	Zip
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Title

ATTACHMENT 5-A SUPPLEMENTS:

(Offeror to insert as required and list here or type "None" on first line. Offeror shall title any Supplement(s) with the same title as named herein and upload with offer.)

	Title	Document Date	No. of pages	Purpose in Offer
1.	None	x	x	x

End of Attachment 5-A



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2018 Professional Services List

Arizona Department of
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**Copy of A.A.C. R2-7-103 [Confidential Information]
as was current at time of Solicitation issuance**

PROVIDED FOR REFERENCE ONLY

- A. *If a person wants to assert that a person's offer, specification, or protest contains a trade secret or other proprietary information, a person shall include with the submission a statement supporting this assertion. A person shall clearly designate any trade secret and other proprietary information, using the term "confidential". Contract terms and conditions, pricing, and information generally available to the public are not considered confidential information under this Section.*
- B. *Until a final determination is made under subsection (C), an agency chief procurement officer shall not disclose information designated as confidential under subsection (A) except to those individuals deemed by an agency chief procurement officer to have a legitimate state interest.*
- C. *Upon receipt of a submission, an agency chief procurement officer shall make one of the following written determinations:*
- 1. The designated information is confidential and the agency chief procurement officer shall not disclose the information except to those individuals deemed by the agency chief procurement officer to have a legitimate state interest;*
 - 2. The designated information is not confidential; or*
 - 3. Additional information is required before a final confidentiality determination can be made.*
- D. *If an agency chief procurement officer determines that information submitted is not confidential, a person who made the submission shall be notified in writing. The notice shall include a time period for requesting a review of the determination by the state procurement administrator.*
- E. *An agency chief procurement officer may release information designated as confidential under subsection (A) if:*
- 1. A request for review is not received by the state procurement administrator within the time period specified in the notice; or*
 - 2. The state procurement administrator, after review, makes a written determination that the designated information is not confidential.*



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Attachment 5-B
Conformance Statements

STATE WILL NOT CONSIDER ANY EXCEPTIONS UNLESS DESIGNATED ON THIS FORM.

READ THE INSTRUCTIONS TO OFFERORS BEFORE TAKING ANY EXCEPTIONS – TAKING EXCEPTIONS CAN BE
GROUNDS FOR STATE REJECTING YOUR OFFER IN EVALUATION.

CONFORMANCE TO THE INSTRUCTIONS:
(PART 1 OF THE SOLICITATION)

Check one of the following – if neither is checked, State will assume that as equivalent to “YES”:

YES – Offeror acknowledges that it has read and understands the Solicitation Summary in Section 1-A of the Solicitation Documents and the Instructions to Offerors in Section 1-B of the Solicitation Documents and the and attests that its Offer complies with both.

NO – Offeror acknowledges that it has read and understands the Solicitation Summary in Section 1-A of the Solicitation Documents and the Instructions to Offerors in Section 1-B of the Solicitation Documents, and attests that its Offer complies with both EXCEPT FOR the exceptions listed in **Attachment 5-B Supplement 1**.

CONFORMANCE TO THE CONTRACT TERMS AND CONDITIONS:
(PART 2 OF THE SOLICITATION)

Check one of the following – if neither is checked, State will assume that as equivalent to “YES”:

YES – Offeror acknowledges that it has read and understands the Special Terms and Conditions and the Uniform Terms and Conditions, along with their respective Exhibits and Appendices, in Part 2 of the Solicitation Documents and attests that its Offer complies with both.

NO – Offeror acknowledges that it has read and understands the Special Terms and Conditions and the Uniform Terms and Conditions, along with their respective Exhibits and Appendices in Part 2 of the Solicitation Documents and attests that its Offer complies with both EXCEPT FOR the exceptions listed in **Attachment 5-B Supplement 2**.

CONFORMANCE TO THE TECHNICAL DOCUMENTS:
(PART 3 OF THE SOLICITATION)

Check one of the following – if neither is checked, State will assume that as equivalent to “YES”:

YES – Offeror acknowledges that it has read and understands the Requirements Document and the Compensation Document in Part 3 of the Solicitation Documents and attests that its Offer complies with both.

PART 4 of the Solicitation Documents:
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NO – Offeror acknowledges that it has read and understands the [Requirements Document and the Compensation Document](#), in Part 3 of the Solicitation Documents and attests that its Offer complies with both EXCEPT FOR the exceptions listed in **Attachment 5-B Supplement 3**.

**ATTACHMENT 5-B Supplement No. 1:
 Exceptions to Instructions**

Article / Paragraph or Exhibit Reference	Proposed Changes / Alternate Language	Rationale for Proposed Change
Section 1-A: Solicitation Summary		
None	x	x
x	x	x
x	x	x
Section 1-B: Instructions to Offerors		
None	x	x
x	x	x
x	x	x

**ATTACHMENT 5-B Supplement No. 2:
 Exceptions to Contract Terms & Conditions**

Article/ Paragraph or Exhibit Reference	Proposed Changes / Alternate Language	Rationale for Proposed Change
Section 2-A: Special Terms & Conditions		
None	x	x
x	x	x
x	x	x

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Article/ Paragraph or Appendix Reference	Proposed Changes / Alternate Language	Rationale for Proposed Change
Section 2-B: Uniform Terms & Conditions		
None	x	x
X	x	x
X	x	x

ATTACHMENT 5-B Supplement No. 3:
Exceptions to Technical and Commercial

Article / Paragraph or Exhibit Reference	Proposed Changes / Alternate Language	Rationale for Proposed Change
Section 2-A Scope of Work (Requirements Document)		
None	x	x
x	x	x
x	x	x
Section 2-B: Compensation Document		
None	x	x
x	x	x
x	x	x

Abacus Project Management, Inc.	
Company Name	Signature of Person Authorized to Sign

End of Attachment 5-B



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Arizona Department of
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Attachment 5-C
Insurance Evidence

RESERVED FOR AWARDED DESIGN PROFESSIONAL UPON SERVICE REQUEST

End of Attachment 5-C



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State Procurement Office
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Attachment 5-D
Offer Checklist

STATE MAY DETERMINE YOUR PROPOSAL IS NON-RESPONSIVE IF YOU DO NOT SUBMIT ALL ATTACHMENTS.

	DOCUMENT	SUBMITTED
1.	Attachment 1: Offer and Acceptance Form - SIGNED	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
2.	Attachment 2-A: Experience and Capacity	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
3.	Attachment 2-A: References	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
4.	Attachment 2-B: Organization Profile	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
5.	Attachment 3-A: Method Proposal – RESERVED FOR AWARD	<input type="checkbox"/> YES <input checked="" type="checkbox"/> no
6.	Attachment 3-B: Key Personnel Proposal	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
7.	Attachment 3-C: Proposed Subcontractors – RESERVED FOR AWARD	<input type="checkbox"/> YES <input checked="" type="checkbox"/> no
8.	Attachment 3-D: Performance Guarantee – RESERVED FOR AWARD	<input type="checkbox"/> YES <input checked="" type="checkbox"/> no
9.	Attachment 3-E: Israel Boycott Form - SIGNED	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
10.	Attachment 4: Pricing Sheet – RESERVED FOR AWARD	<input type="checkbox"/> YES, <input checked="" type="checkbox"/> no
11.	Attachment 5-A: Confidential Information Designation - SIGNED	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
12.	Attachment 5-B: Conformance Statements - SIGNED	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
13.	Attachment 5-C: Insurance Evidence – RESERVED FOR AWARD	<input type="checkbox"/> YES <input checked="" type="checkbox"/> no
14.	Attachment 5-D: Offer Checklist	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
15.	.pdf File: Number of Projects and Revenue	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no
16.	Excel File: 2018 Professional Services List of Firms Services	<input checked="" type="checkbox"/> YES <input type="checkbox"/> no

End of Attachment 5-D

End of Part 4

PART 4 of the Solicitation Documents:
 Offer Forms (Attachments)

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ADSP018-00007887 Project Experience N
 ADSP018-00007887 2018 Professional Services Qualifications List **(save docu**

FIRMS NAME (INSERT NAME): Abacu

TYPE OF PROJECT	TOTAL NUMBER OF FIRM PROJECTS (ALL FIRM LOCATIONS) COMPLETED IN LAST THREE YEARS	Using the Revenue Index (Enter 1-10) indicate the approximate revenue the firm has earned over the last three years from ARIZONA ONLY state, municipal, federal etc. government projects only	Using the Revenue Index (Enter 1-10) indicate the approximate revenue the firm has earned over the last three years from ARIZONA ONLY non- government projects only
Acoustics, Noise Abatement			
Activity Centers	4	3	0
Aerial Photography; Airborne Data and Imagery Collection and Analysis			
Agricultural Development; Grain Storage; Farm Mechanization			
Air Pollution Control			
Airports; Nav aids; Airport Lighting; Aircraft Fueling			
Airports; Terminals and Hangars; Freight Handling	2	1	0
Animal Facilities			
Anti-Terrorism/Force Protection			
Area Master Planning			
Auditoriums and Theaters			
Automation; Controls; Instrumentation			
Barracks; Dormitories			
Bridge Design: Bridges			
Cartography			
Cemeteries (<i>Planning and Relocation</i>)			
Chemical Processing and Storage			
Child Care/Development Facilities			
Codes; Standards; Ordinances			
Cold Storage; Refrigeration and Fast Freeze			
Commercial Building (<i>Low Rise</i>); Shopping Centers	1	0	1
Communications Systems; TV; Microwave			

Community Facilities	29	4	0
Computer Facilities			
Conservation and Resource Management			
Construction Management	46	5	2
Construction Materials Testing			
Construction Surveying			
Controls and Electronics Engineer			
Corrosion Control; Cathodic Protection Electrolysis			
Cost Estimating; Cost Engineering and Analysis; Parametric Costing; Forecasting	74	5	2
Cryogenic Facilities			
Dams (<i>Concrete; Arch</i>)			
Dams (<i>Earth; Rock</i>); Dikes; Levees			
Desalinization (<i>Process and Facilities</i>)			
Design & Planning Structured Parking Facilities			
Design-Build - Preparation of Requests for Proposals			
Detention Security Systems			
Digital Elevation and Terrain Model Development			
Digital Orthophotography			
Dining Halls; Clubs; Restaurants	2	0	2
Disability / Special Needs			
Dredging Studies and Design			
Ecological and Archeological Investigations			
Educational Facilities; Classrooms	29	3	1
Electrical Studies and Design			
Electronics			
Elevators; Escalators; People-Movers			
Energy / Water Auditing Savings			
Energy Conservation; New Energy Sources			
Environmental Impact Studies, Assessments or Statements			
Fallout Shelters; Blast-Resistant Design			
Fire Protection			
Fisheries; Fish Ladders			
Forensic Engineering			
Garages; Vehicles Maintenance Facilities; Parking	12	3	1
Gas Systems (<i>Propane; Natural, Etc.</i>)			
Geodetic Surveying: Ground and Airborne			
Heating; Ventilating; Air Conditioning			
Highways; Streets; Airfield Paving; Parking Lots			
Historical Preservation			

Hospital and Medical Facilities			
Hotels; Motels			
<i>Housing (Residential, Multi-Family; Apartments; Condominiums)</i>	10	1	1
Hydraulics and Pneumatics			
Hydrographic Surveying			
Industrial Buildings; Manufacturing Plants			
Industrial Processes; Quality Control			
Industrial Waste Treatment			
Intelligent Transportation Systems			
Infrastructure			
Irrigation; Drainage			
Judicial and Courtroom Facilities			
Laboratories; Medical Research Facilities			
Labs - General			
Labs – Research – Dry			
Labs – Research – Wet			

umber of Projects and Revenue

ment as a .pdf and submit as an attachment with offer submission).

s Project Management, Inc.

TYPE OF PROJECT	TOTAL NUMBER OF FIRM PROJECTS (ALL FIRM LOCATIONS) COMPLETED IN LAST THREE YEARS	Using the Revenue Index (Enter 1-10) indicate the approximate revenue the firm has earned over the last three years from ARIZONA ONLY state, municipal, federal etc. government projects only	Using the Revenue Index (Enter 1-10) indicate the approximate revenue the firm has earned over the last three years from ARIZONA ONLY non-government projects only
Land Surveying			
Landscape Architecture			
LEED Accredited A/E			
LEED Independent 3rd Party Building Commissioning			
Libraries; Museums; Galleries	5	1	1
Lighting (Exteriors; Streets; Memorials; Athletic Fields, Etc.)			
Lighting (Interior; Display; Theater, Etc.)			
Lighting (Cave; Cavern)			
Mapping Location/Addressing Systems			
Materials Handling Systems; Conveyors; Sorters			
Materials Testing			
Measurement / Verification / Conservation Water Consumption			
Medical Related	3	1	0
Metallurgy			
Mining and Mineralogy			
Modular Systems Design; Pre-Fabricated Structures or Components			
Mold Investigation			
Museums			
Nuclear Facilities; Nuclear Shielding			
Office Buildings; Industrial Parks	7	2	1
Outdoor Recreation			
Petroleum and Fuel (Storage and Distribution)			

Phase I Environmental			
Photogrammetry			
Pipelines (<i>Cross-Country - Liquid and Gas</i>)			
Plumbing and Piping Design			
Pneumatic Structures, Air-Support Buildings			
Power Generation, Transmission, Distribution			
Prisons and Correctional Facilities	1	1	0
Product, Machine Equipment Design			
Public Safety Facilities	7	3	0
Radar; Sonar; Radio and Radar Telescopes			
Radio Frequency Systems and Shieldings			
Railroad; Rapid Transit			
Recreation Facilities (<i>Parks, Marinas, Etc.</i>)	8	3	0
Refrigeration Plants/Systems			
Rehabilitation (<i>Buildings; Structures; Facilities</i>)			
Research Facilities			
Resources Recovery; Recycling			
Rivers; Canals; Waterways; Flood Control			
Roof Infrared Imaging to Identify Water Leaks			
Roofing			
Safety Engineering; Accident Studies; OSHA Studies			
Security Systems; Intruder and Smoke Detection			
Seismic Designs and Studies			
Sewage Collection, Treatment and Disposal			
Soils and Geologic Studies; Foundations			
Solar Energy Utilization			
Solid Wastes; Incineration; Landfill			
Special Environments; Clean Rooms, Etc.			
Specifications Writing			
Storm Water Handling and Facilities			
Structural Design; Special Structures			
Surveying; Platting; Mapping; Flood Plain Studies			
Sustainable Design			
Swimming Pools			
Testing and Inspection Services			
Topographic Surveying and Mapping			
Towers (Self-Supporting and Guyed Systems)			
Toxicology			
Traffic and Transportation Engineering			

Traffic Studies			
Transportation			
Tunnels and Subways			
Urban Renewals; Community Development			
Utilities (Gas and Steam)			
Value Analysis; Life-Cycle Costing	2	1	0
Warehouse and Depots	1	0	1
Waste Water Treatment Facility	2	1	0
Water Resources; Hydrology; Ground Water			
Water Supply; Treatment and Distribution			
Water Well Rehabilitation; Water Well Work			
Wind Tunnels; Research/Testing Facilities Design			
Zoning; Land Use Studies			

Professional Services	<u>Revenue</u>
Index Number	

- 1.** Less than \$100,000
- 2.** \$100,000 to less than \$250,000
- 3.** \$250,000 to less than \$500,00
- 4.** \$500,000 to less than \$1 Million
- 5.** \$1 Million to less than \$2 Million
- 6.** \$2 Million to less than \$5 Million
- 7.** \$5 Million to less than \$10 Million
- 8.** \$10 Million to less than \$25 Million
- 9.** \$25 Million to less than \$50 Million
- 10.** \$50 Million or greater

SAM Search Results
List of records matching your search for :

Search Term : abacus* project* managment* inc*
Record Status: Active, Inactive

No Search Results