



# Offer and Acceptance

**State of Arizona**  
**State Procurement Office**

100 N. 15<sup>th</sup> Ave. Suite 201  
Phoenix, AZ 85007

SOLICITATION NO.: ADSP016-00005912 Request  
for Qualifications: 2016 Annual Professional  
Services List

PAGE  
1

Offeror: Herzog Associates, pllc

OF  
1

## OFFER

### TO THE STATE OF ARIZONA:

The Undersigned hereby offers and agrees to furnish the material, service or construction in compliance with all terms, conditions, specifications and amendments in the Solicitation and any written exceptions in the offer. Signature also certifies Small Business status.

Herzog Associates, pllc

Company Name

2975 N. Country Club Rd,

Address

Signature of Person Authorized to Sign Offer

Steven P. Herzog

Printed Name

Managing Member

Title

Tucson

City

Arizona

State

85716

Zip

Phone: 520-325-5847

Fax: N/A

steve@herzogassociates.com

Contact Email Address

By signature in the Offer section above, the Offeror certifies:

1. The submission of the Offer did not involve collusion or other anticompetitive practices.
2. The Offeror shall not discriminate against any employee or applicant for employment in violation of Federal Executive Order 11246, State Executive Order 2009-9 or A.R.S. §§ 41-1461 through 1465.
3. The Offeror 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 shall result in rejection of the offer. Signing the offer with a false statement shall void the offer, any resulting contract and may be subject to legal remedies provided by law.
4. The Offeror certifies that the above referenced organization  IS/  IS NOT a small business with less than 100 employees or has gross revenues of \$4 million or less.

## ACCEPTANCE OF OFFER

The Offer is hereby accepted.

The Contractor is now bound to sell the materials or services listed by the attached contract and based upon the solicitation, including all terms, conditions, specifications, amendments, etc., and the Contractor's Offer as accepted by the State.

This Contract shall henceforth be referred to as Contract No. ADSP016-00005912

The effective date of the Contract is March 1, 2016

The Contractor is cautioned not to commence any billable work or to provide any material or service under this contract until Contractor receives purchase order, contract release document or written notice to proceed.

State of Arizona  
Awarded this

29

day of

February

20

16

Procurement Officer



ATTACHMENT I – General Qualifications

ANNUAL REQUEST FOR QUALIFICATIONS AND EXPERIENCE NO:  
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**DEFINITIONS**

**Architect Services, Engineer Services, Land Surveying Services, Assayer Services, Geologist Services and Landscape Architect Services:** Those professional services within the scope of the practice of those services as provided in ARS § 32-101.

**Branch Office:** A geographically distinct place of business or subsidiary office of a firm that has a key role on the team.

**Discipline:** Primary technical capabilities of key personnel, as evidenced by academic degree, professional registration, certification, and/or extensive experience.

**Firm:** Defined in ARS § 32-101(B.19.).

**Key Personnel:** Individuals who will have major contract responsibilities and/or provide unusual or unique expertise.

**SPECIFIC INSTRUCTIONS:**

1. Complete this form for each branch office seeking work under this RFQ.
  - a. – e. **Firm (or Branch Office) Name and Address.** Self-explanatory.
  - f. **Year Established.** Enter the year the firm (or branch office, if appropriate) was established under the current name.
  - g. **Ownership.**
    - (g1). *Type.* Enter the type of ownership or legal structure of the firm (sole proprietor, partnership, corporation, joint venture, etc.).
    - (g2). *Small Business Status.* A firm is a small business if the firm has less than 100 employees **or** has gross revenues of \$4 million or less.
  - h.-j. **Point of Contact.** Provide this information for a representative of the firm that the Customer can contact for additional information. The representative must be empowered to speak on contractual and policy matters.
  - k. **Name of Firm.** Enter the name of the firm.
2. **Employees by Discipline.**
  - a. Select disciplines from the List of Disciplines (Function Code) listed on Page 3 of 4 Instructions. For employees that do not qualify for any of the disciplines, select Other. *Note: The intended searchable database indicated in the RFQ will be populated from the Qualifications Form I Excel attachment only.*
  - b. Each person can be counted only twice; once for his/her primary function and once for his/her secondary function. Primary and secondary functions should be indicated by including a “P” or an “S” in column b after the Description Title is given.
  - c-d. If the form is completed for a firm (including all branch offices), enter the number of employees by disciplines in column c. If the form is completed for a branch office, enter the number of employees by discipline in column d and for the firm in column c.
3. **Profile of Firm's Experience and Annual Average Revenue for Last Year.**
  - a. Enter the approximate number of projects the firm (or branch) has done attributable by Profile Code listed on Page 3 of 4 Instructions over the last year.



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- b. Enter the appropriate Profile Codes from Instructions Pages 3 of 4 that represent the type of work the firm (or branch) has done over the last year.
  - c. Using the Revenue Index Number on Page 3 of 6 Form, indicate the approximate revenue the firm has earned over the last year per Profile Code entered into the table.
4. **Resumes of Key Personnel Proposed for This Contract.** Complete this section for each key person who will participate in this contract.
- a. Self-explanatory.
  - b. Self-explanatory
  - c. Total years of relevant experience (block c1), and years of relevant experience with current firm, but not necessarily the same branch/office (block c2).
  - d. Name, City and State of the firm where the person currently works, which must correspond with one of the firms (or branch office or a firm, if appropriate) listed in Section 1.
  - e. Provide information on the highest relevant academic degree(s) received. Indicate the area(s) of specialization for each degree.
  - f. Provide information on current relevant professional registration(s) and in which State(s) they are current.
  - g. Provide information on any other professional qualifications relating to this contract, such as education, professional registration, publications, organizational memberships, certifications, training, awards, and foreign language capabilities.
  - h. Provide information on no more than five (5) projects in the last year which the person had a significant role that demonstrates the person's capability relevant to her/his proposed role in this contract. These projects do not necessarily have to be any of the projects presented in Section 5 for the project team if the person was not involved in any of those those projects or the person worked on other projects that were more relevant than the team projects in Section 5. Use the check box provided to indicate if the project was performed with any office of the current firm. If any of the professional services or construction projects are not complete, leave Year Completed blank and indicate the status in Brief Description and Specific Role.
5. **Example Projects Which Best Illustrate Firms Qualification for this contract.** Select project where multiple team members worked together, if possible, that demonstrate the team's capability to perform work similar to that required for this contract. Complete one Section 5 for each project. List no more than five (5) projects.
- 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.
6. **Additional Information.** Use this section to provide additional information you feel may be necessary to describe your firm's qualifications for this contract.
7. **Annual Average Professional Services Revenues of Firm for Last 3 Years.** Complete this block for the firm or branch office for which this form is completed. In column a, enter an approximate percentage of total work attributable to State, Federal or Municipal Work. In column b, enter an approximate percentage of total work attributable to Non-Government work. Percentages should take into consideration work completed over the last 3 years.



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8. **Authorized Representative.** An authorized representative of the firm or branch office must sign and date the completed form. Signing attests that the information provided is current and factual. Provide the name and title of the authorized representative who signed the form.

List of Disciplines (Function Codes) for Question 2

- |                           |  |                          |
|---------------------------|--|--------------------------|
| Aeronautical Engineer     | Environmental Engineer                   | Mining Engineer          |
| Agricultural Engineer     | Environmental Scientist                  | Nuclear Engineer         |
| Archeologist              | Fire Protection Engineer                 | Petroleum Engineer       |
| Architect                 | Geodetic Surveyor                        | Photogrammetrist         |
| Architectural Engineering | Geographic Information System Specialist | Project Manager          |
| Biologist                 | Geological Engineer                      | Sanitary Engineer        |
| CADD Technician           | Geologist                                | Soils Engineer           |
| Chemical Engineer         | Hydrographic Surveyor                    | Structural Engineer      |
| Civil Engineer            | Hydraulic Engineer                       | Technician/Analyst       |
| Construction Manager      | Hydrologist                              | Transportation Engineer  |
| Construction Inspector    | Industrial Engineer                      | Water Resources Engineer |
| Control Systems Engineer  | Landscape Architect                      |                          |
| Cost Engineer/Estimator   | Mechanical Engineer                      |                          |
| Ecologist                 | Metallurgical Engineer                   |                          |
| Electrical Engineer       |  |                          |

List of Experience Categories (Profile Codes for Question 3)

- |   |  |
|---|--|
| Acoustics, Noise Abatement  | Dams ( <i>Concrete; Arch</i> )                                       |
| Aerial Photography; Airborne Data and Imagery Collection and Analysis           | Dams ( <i>Earth; Rock</i> ); Dikes; Levees                           |
| Activity Centers  | Desalinization ( <i>Process and Facilities</i> )                     |
| Air Pollution Control   | Design-Build - Preparation of Requests for Proposals                 |
| Airports; Navajds; Airport Lighting; Aircraft Fueling                           | Digital Elevation and Terrain Model Development                      |
| Airports; Terminals and Hangars; Freight Handling                               | Digital Orthophotography   |
| Agricultural Development; Grain Storage; Farm Mechanization                     | Dining Halls; Clubs; Restaurants                                     |
| Animal Facilities   | Dredging Studies and Design  |
| Anti-Terrorism/Force Protection   | Design & Planning Structured Parking Facilities                      |
| Area Master Planning  | Detention Security Systems   |
| Auditoriums and Theaters  | Disability / Special Needs   |
| Automation; Controls; Instrumentation   | Ecological and Archeological Investigations                          |
| Barracks; Dormitories   | Educational Facilities; Classrooms                                   |
| Bridge Design: Bridges  | Electrical Studies and Design  |
| Cartography   | Electronics  |
| Cemeteries ( <i>Planning and Relocation</i> )                                   | Elevators; Escalators; People-Movers                                 |
| Chemical Processing and Storage   | Energy / Water Auditing Savings                                      |
| Child Care/Development Facilities   | Energy Conservation; New Energy Sources                              |
| Codes; Standards; Ordinances  | Environmental Impact Studies, Assessments or Statements              |
| Cold Storage; Refrigeration and Fast Freeze                                     | Fallout Shelters; Blast-Resistant Design                             |
| Commercial Building ( <i>Low Rise</i> ); Shopping Centers                       | Fire Protection  |
| Community Facilities  | Fisheries; Fish Ladders  |
| Communications Systems; TV; Microwave   | Forensic Engineering   |
| Computer Facilities   | Garages; Vehicles Maintenance Facilities; Parking                    |
| Conservation and Resource Management  | Gas Systems ( <i>Propane; Natural, Etc.</i> )                        |
| Construction Management   | Geodetic Surveying: Ground and Airborne                              |
| Construction Surveying  | Heating; Ventilating; Air Conditioning                               |
| Corrosion Control; Cathodic Protection Electrolysis                             | Highways; Streets; Airfield Paving; Parking Lots                     |
| Cost Estimating; Cost Engineering and Analysis; Parametric Costing; Forecasting | Historical Preservation  |
| Cryogenic Facilities  | Hospital and Medical Facilities                                      |
| Construction Materials Testing  | Hotels; Motels   |
|   | <i>Housing (Residential, Multi-Family; Apartments; Condominiums)</i> |



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Hotels; Motels  
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  
Land Surveying  
Landscape Architecture  
Libraries; Museums; Galleries  
Lighting (*Interior; Display; Theater, Etc.*)  
Lighting (*Exteriors; Streets; Memorials; Athletic Fields, Etc.*)  
Labs - General  
Labs – Research – Dry  
Labs – Research – Wet  
LEED Accredited A/E  
LEED Independent 3<sup>rd</sup> Party Building Commissioning  
Mapping Location/Addressing Systems  
Materials Handling Systems; Conveyors; Sorters  
Metallurgy  
Materials Testing  
Measurement / Verification / Conservation Water Consumption Savings  
Mining and Mineralogy  
Medical Related  
Modular Systems Design; Fabricated Structures or Components  
Mold Investigation  
Museums  
Nuclear Facilities; Nuclear Shielding  
Office Buildings; Industrial Parks  
Outdoor Recreation  
Petroleum and Fuel (*Storage and Distribution*)  
Photogrammetry  
Pipelines (*Cross-Country - Liquid and Gas*)  
Phase I Environmental  
Prisons & Correctional Facilities  
Plumbing and Piping Design  
Prisons and Correctional Facilities  
Product, Machine Equipment Design Pneumatic Structures, Air-Support Buildings Power Generation, Transmission, Distribution Public Safety Facilities  
Radar; Sonar; Radio and Radar Telescopes  
Radio Frequency Systems and Shielding's  
Railroad; Rapid Transit  
Recreation Facilities (*Parks, Marinas, Etc.*)  
Refrigeration Plants/Systems  
Rehabilitation (*Buildings; Structures; Facilities*)  
Research Facilities  
Resources Recovery; Recycling  
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.  
Structural Design; Special Structures  
Surveying; Platting; Mapping; Flood Plain Studies  
Sustainable Design  
Swimming Pools  
Storm Water Handling and Facilities  
Specifications Writing  
Toxicology  
Testing and Inspection Services  
Traffic and Transportation Engineering  
Topographic Surveying and Mapping  
Towers (*Self-Supporting and Guyed Systems*)  
Tunnels and Subways  
Traffic Studies  
Transportation  
Urban renewals; Community Development  
Utilities (*Gas and Steam*)  
Value Analysis; Life-Cycle Costing  
Warehouse and Depots  
Water Resources; Hydrology; Ground Water  
Water Supply; Treatment and Distribution  
Wind Tunnels; Research/Testing Facilities Design  
Waste Water Treatment Facility  
Water Well Rehabilitation; Water Well Work  
Zoning; Land Use Studies



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(If a firm has branch offices, complete for each specific branch office seeking work.)

1. **Annual Request for Qualifications**

a. FIRM (OR BRANCH OFFICE ) NAME:	Herzog Associates, pllc
b. FIRM (OR BRANCH OFFICE) STREET:	2975 N. Country Club Rd.
c. FIRM (OR BRANCH OFFICE) CITY:	Tucson
d. FIRM (OR BRANCH OFFICE) STATE:	Arizona
e. FIRM (OR BRANCH OFFICE) ZIP CODE:	85716-1911

f. YEAR ESTABLISHED:	2013
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(g1). OWNERSHIP - TYPE:	pllc
(g2) OWNERSHIP - SMALL BUSINESS STATUS:	yes

h. POINT OF CONTACT NAME AND TITLE:	Steven P. Herzog, AIA, LEED-AP, managing member
i. POINT OF CONTACT TELEPHONE NUMBER:	520.325.5847
j. POINT OF CONTACT E-MAIL ADDRESS:	steve@herzogassociates.com

k. NAME OF FIRM (If block 1a is a branch office):	
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**2. EMPLOYEES BY DISCIPLINE**

a. Discipline Title	b. Function: Primary (P) or Secondary (S)	c. No. of Employees - Firm	d. No. of Employees - Branch
Architect	P	1	
Cadd Technician	P	1	
Cadd Technician	S	1	
<b>Total</b>		<b>3</b>	





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**4. Resumes of Key Personnel Proposed for this Contract** (Complete one Section 4 for each key person.)

a. NAME Steven P. Herzog, AIA, LEED-AP	b. ROLE IN THIS CONTRACT Principal In Charge	c. YEARS EXPERIENCE	
		1. TOTAL 32	2. WITH CURRENT FIRM 3
d. LOCATION (City and State) Herzog Associates, pllc. Tucson, Arizona			
e. EDUCATION (DEGREE AND SPECIALIZATION) Bachelor of Architecture University of Arizona		f. PROFESSIONAL TRAINING - REGISTRATIONS Architect, Arizona, 1986 Architect. California, 1987	
g. OTHER PROFESSIONAL QUALIFICATIONS (Organizations, Awards, etc.) National Council of Architectural Registration Boards, 1987 LEED Accredited Professional American Institute of Architects City of Tucson - Fire Code Review Committee, Chair			

**H. RELEVANT PROJECTS**

1.	(1) TITLE AND LOCATION (City and State) Tucson Airport Authority 10113297 Solar Photovoltaic Project Phase 2 7005 S. Plumer Tucson, Arizona 85706	(2) YEAR COMPLETED	
		Professional Services 2015	Construction (if applicable) Pending
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE The Solar Photovoltaic Project provides a 1.5 MW AC PV System on a canopy structure constructed in the Daily Parking Lot at the Tucson International Airport. The Project has required PV modules (solar panels), power inverters, a canopy structure, switching, transmission and communications equipment, and energy production tracking systems.	<input checked="" type="checkbox"/>	Check if project performed with current firm
2.	(1) TITLE AND LOCATION (City and State) Space Planning, Molloy Administration Building Child Parent Centers, Inc. 602 E. 22nd Street, Tucson Arizona 85713	(2) YEAR COMPLETED	
		Professional Services 2015	Construction (if applicable) 2016
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Space planning for expansion and re-organization of Molloy Administration Building. Principal in Charge.	<input checked="" type="checkbox"/>	Check if project performed with current firm
3.	(1) TITLE AND LOCATION (City and State) El Camino Baptist Church Lobby Expansion and accessibility upgrades 7777 E. Speedway Blvd. Tucson, Arizona 857	(2) YEAR COMPLETED	
		Professional Services 2014	Construction (if applicable) 2015
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Expand the main lobby serving the Sanctuary for better circulation. Provide accessibility upgrades including a "Family Assist" restroom and an accessible parking lot drop-off. 1,600 S.F. Budget: \$350,000.00 Principal in Charge	<input checked="" type="checkbox"/>	Check if project performed with current firm
4.	(1) TITLE AND LOCATION (City and State) Borton Primary Magnet School K-5 Renovations Tucson Unified School District 700 E. 22nd St., Tucson, AZ 85713	(2) YEAR COMPLETED	
		Professional Services 2013	Construction (if applicable) 2013
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Phase 1 - Determine best location for the Kitchen Addition & Modular Building considering site access for loading & delivery, parking lot drives & parking spaces. Phase 2 - Services for the design & documentation of the Kitchen addition & the renovation of the Multi-Purpose Room & associated spaces vacated by the relocation of existing Kitchen. Principal in Charge.	<input checked="" type="checkbox"/>	Check if project performed with current firm
5.	(1) TITLE AND LOCATION (City and State) Borton Primary Magnet School K-5 Renovations Tucson Unified School District 700 E. 22nd St., Tucson, AZ 85713	(2) YEAR COMPLETED	
		Professional Services 2013	Construction (if applicable) 2013
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Phase 3 – Schematic Design for a 9 classroom prototype constructed as a factory built site assembled modular building with site formed slab on grade. Principal in Charge.	<input checked="" type="checkbox"/>	Check if project performed with current firm



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**4. Resumes of Key Personnel Proposed for this Contract** (Complete one Section 4 for each key person.)

a. NAME Georgette Stathis-Pearson, LEED-AP	b. ROLE IN THIS CONTRACT Cadd Technician	c. YEARS EXPERIENCE	
		1. TOTAL 15	2. WITH CURRENT FIRM 3
d. LOCATION (City and State) Herzog Associates, pllc. Tucson, Arizona			
e. EDUCATION (DEGREE AND SPECIALIZATION) Bachelor of Architecture University of Arizona		f. PROFESSIONAL TRAINING - REGISTRATIONS	
g. OTHER PROFESSIONAL QUALIFICATIONS (Organizations, Awards, etc.) LEED Accredited Professional			

**H. RELEVANT PROJECTS**

1.	(1) TITLE AND LOCATION (City and State) Nogales Border Patrol Station, Infrastructure Improvements Project 1500 West La Quinta Road, Nogales, Arizona 85621 US Army Corps of Engineers	(2) YEAR COMPLETED	
		Professional Services 2014	Construction (if applicable) Pending Funding
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Installation of a new overlay standing seam metal roofing system with a "retro-fit" sub-purlin system and blanket insulation for an existing pre-engineered steel warehouse building. Cadd Technician.	<input checked="" type="checkbox"/> Check if project performed with current firm	
2.	(1) TITLE AND LOCATION (City and State) Human Resources Space Planning, Morrow Education Building Tucson Unified School District 1010 E. 10th Street, Tucson Arizona 85719	(2) YEAR COMPLETED	
		Professional Services 2014	Construction (if applicable) 2014
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Space planning for expansion and re-organization of TUSD's Human Resources Department. Cadd Technician.	<input checked="" type="checkbox"/> Check if project performed with current firm	
3.	(1) TITLE AND LOCATION (City and State) El Camino Baptist Church Lobby Expansion and accessibility upgrades 7777 E. Speedway Blvd. Tucson, Arizona 857	(2) YEAR COMPLETED	
		Professional Services 2014	Construction (if applicable) 2015 (pending)
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Expand the main lobby serving the Sanctuary for better circulation. Provide accessibility upgrades including a "Family Assist" restroom and an accessible parking lot drop-off. 1,600 S.F. Budget: \$350,000.00 Cadd Technician.	<input checked="" type="checkbox"/> Check if project performed with current firm	
4.	(1) TITLE AND LOCATION (City and State) Borton Primary Magnet School K-5 Renovations Tucson Unified School District 700 E. 22nd St., Tucson, AZ 85713	(2) YEAR COMPLETED	
		Professional Services 2013	Construction (if applicable) 2013
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Phase 1 - Determine best location for the Kitchen Addition & Modular Building considering site access for loading & delivery, parking lot drives & parking spaces. Phase 2 - Services for the design & documentation of the Kitchen addition & the renovation of the Multi-Purpose Room & associated spaces vacated by the relocation of existing Kitchen. Cadd Technician.	<input checked="" type="checkbox"/> Check if project performed with current firm	
5.	(1) TITLE AND LOCATION (City and State) Borton Primary Magnet School K-5 Renovations Tucson Unified School District 700 E. 22nd St., Tucson, AZ 85713	(2) YEAR COMPLETED	
		Professional Services 2013	Construction (if applicable) 2013
	(3) BRIEF DESCRIPTION (Brief scope, size, cost, etc.) AND SPECIFIC ROLE Phase 3 – Schematic Design for a 9 classroom prototype constructed as a factory built site assembled modular building with site formed slab on grade. Cadd Technician.	<input checked="" type="checkbox"/> Check if project performed with current firm	



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**5a. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**

*(Present no more than five (5) projects. Complete one Section 5 for each project.)*

a. TITLE AND LOCATION <i>(City and State)</i> El Camino Baptist Church Lobby Expansion and Accessibility Improvements 7777 E. Speedway Blvd. Tucson, Arizona 85710	b. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2014	CONSTRUCTION <i>(If applicable)</i> 2015 (pending)

**23. PROJECT OWNER'S INFORMATION**

c. PROJECT OWNER El Camino Baptist Church 7777 E. Speedway Blvd. Tucson, Arizona 85710	d. DOLLAR AMOUNT OF PROJECT \$350,159.00 (estimate)	e. TOTAL COST OF PROJECT \$321,500.00
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f. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(include scope, size, and length of project)*

1. The expansion of the existing Foyer south to the edge of the existing overhang. The addition of the "Family Assist" accessible restroom and new accessible drinking fountains. The project includes the demolition of the existing exterior masonry wall, aluminum entrance doors and associated glu-lam beams above the south wall of the foyer. New columns and a low profile clear span steel beam were added in this location to open up the foyer and allow for expansion to the south face of the existing overhang. The concrete slab under the existing overhang, along with the glu-lam beams and central column which support the overhang were also removed. A new clear span low profile steel beam was added here as well to support the edge of the existing overhang. After the relocation of the existing grease trap the floor slab was replaced and the envelope of the lobby completed with a new storefront entrance system and high efficiency glass. A recessed manual sun shade system was installed in the Lobby ceiling at the line of the storefront for further sun control. Renovation of the new lobby space also include a new reception desk. The project included new finishes throughout the expanded lobby, including new flooring, paint and new ceilings.





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**5a. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**

*(Present no more than five (5) projects. Complete one Section 5 for each project.)*

a. TITLE AND LOCATION <i>(City and State)</i>	b. YEAR COMPLETED	
Borton Primary Magnet School K-5 Renovations 700 E. 22 <sup>nd</sup> Street Tucson, AZ 85713	PROFESSIONAL SERVICES 2012	CONSTRUCTION <i>(If applicable)</i> 2103

**23. PROJECT OWNER'S INFORMATION**

c. PROJECT OWNER	d. DOLLAR AMOUNT OF PROJECT	e. TOTAL COST OF PROJECT
Tucson Unified School District 2025 E. Winsett St. Tucson, Arizona 85719	\$2,800,000.00	\$2,502,438.00

**f. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT** *(include scope, size, and length of project)*

Phase 1 - Determine best location for the Kitchen Addition & Modular Building considering site access for loading & delivery, parking lot drives & parking spaces. Phase 2 - Services for the design & documentation of the Kitchen addition & the renovation of the Multi-Purpose Room & associated spaces vacated by the relocation of existing Kitchen. Phase 3 - Schematic design of the Modular Classroom Building.





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**5d. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**

*(Present no more than five (5) projects. Complete one Section 5 for each project.)*

a. TITLE AND LOCATION <i>(City and State)</i> Tucson Airport Authority 10113297 Solar Photovoltaic Project Phase 2 7005 S. Plumer Tucson, Arizona 85706	b. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2015	CONSTRUCTION <i>(If applicable)</i> Pending

**23. PROJECT OWNER'S INFORMATION**

c. PROJECT OWNER Tucson Airport Authority 7005 S. Plumer Tucson, Arizona 85706	d. DOLLAR AMOUNT OF PROJECT \$8,474,600.00	e. TOTAL COST OF PROJECT Pending
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f. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(include scope, size, and length of project)*  
 The Solar Photovoltaic Project provides a 1.5 MW AC PV System on a canopy structure constructed in the Daily Parking Lot at the Tucson International Airport. The Project has required PV modules (solar panels), power inverters, a canopy structure, switching, transmission and communications equipment, and energy production tracking systems. 2. The PV system will consist of 43 individual arrays over the "Daily" lot, 24 additional arrays over the "Hourly" lot and 11 smaller arrays to cover the accessible parking area. Each array over the "Daily" and "Hourly" lots consists of ninety eight individual PV modules arranged in seven strings of fourteen. The smaller arrays consist of 42 individual PV modules arranged in three strings of fourteen. All arrays are mounted on the structural steel support system with a fixed "tilt" of ten degrees. The radial layout of the PV arrays established by the existing installation will be continued in the "Hourly" lot. The arrays will follow the existing curvature of the parking lot rows arrayed along the centerline of the main pedestrian access to the terminal. The arrays at the "Daily" lot are arranged rectilinearly to follow the existing parking layout and maximize the number of arrays provided.





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**5c. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**

*(Present no more than five (5) projects. Complete one Section 5 for each project.)*

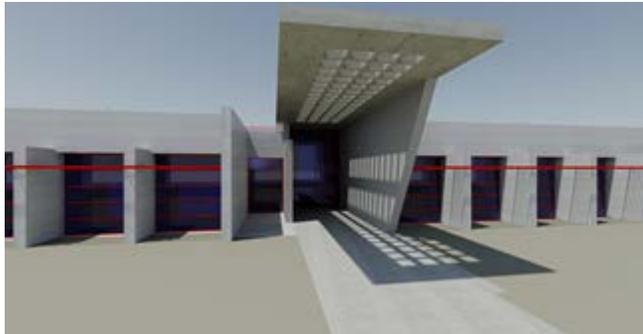
a. TITLE AND LOCATION <i>(City and State)</i>	b. YEAR COMPLETED	
Management Information Systems Office Building Gila River Indian Community Sacaton, Arizona	PROFESSIONAL SERVICES 2011	CONSTRUCTION <i>(If applicable)</i> Pending Funding

**23. PROJECT OWNER'S INFORMATION**

c. PROJECT OWNER	d. DOLLAR AMOUNT OF PROJECT	e. TOTAL COST OF PROJECT
Gila River Indian Community 315 W. Casa Blanca Road Sacaton, Arizona	\$11,645,500.00	

**f. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT** *(include scope, size, and length of project)*

The new Management Information Systems Building is designed to accommodate a 6000 s.f. Tier 3 Data Center, offices for the M.I.S. Department, the Office of Emergency Management, an Emergency Operations Center and the Dispatch Center for the Gila River Indian Community. The Data Center, the Emergency Operations Center and the Dispatch Center are designed for N+1 redundancy of all power, lighting and mechanical systems. The project was designed to allow for phased construction and future expansion. The project is currently on hold due to funding.





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**5e. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**

*(Present no more than five (5) projects. Complete one Section 5 for each project.)*

<p>a. TITLE AND LOCATION <i>(City and State)</i></p> <p>Proto-Typical Gymnasiums Sabino High School, Sahuaro High School, and Santa Rita High School Tucson, Arizona</p>	b. YEAR COMPLETED	
	PROFESSIONAL SERVICES 2008	CONSTRUCTION <i>(If applicable)</i> 2009

**23. PROJECT OWNER'S INFORMATION**

<p>c. PROJECT OWNER</p> <p>Tucson Unified School District 2025 East Winsett Street Tucson, Arizona 85719</p>	<p>d. DOLLAR AMOUNT OF PROJECT</p> <p>\$12,000,000.00</p>	<p>e. TOTAL COST OF PROJECT</p> <p>Sabino High School: \$3,963,250.00 Sahuaro High School: \$4,046,548.00 Santa Rita High School: \$3,718,565.00</p>
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f. BRIEF DESCRIPTION OF PROJECT AND RELEVANCE TO THIS CONTRACT *(include scope, size, and length of project)*

The new Practice Gymnasiums are each approximately 19,500 square feet in area. The gyms include wood floors, limited bleacher seating, gymnasium equipment, a trainer's room, and support facilities. Generally, construction consists of clear span, steel joist girders supported by masonry veneer bearing walls. Each high school site required a varying degree of preparation, including the relocation of sewers, storm drains, water and electrical lines, and earthwork to establish finish floor.





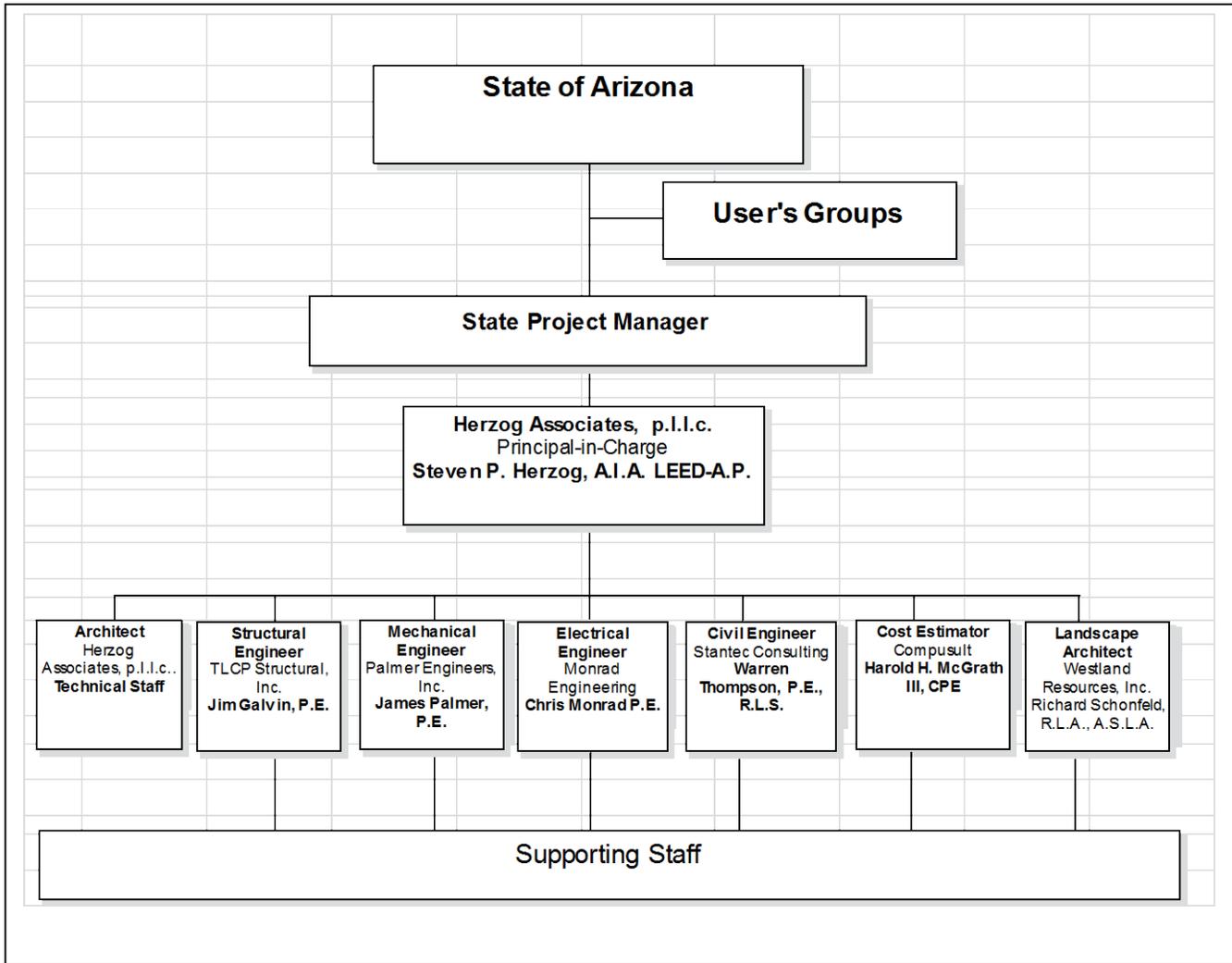
**6. ADDITIONAL INFORMATION**

**a. PROVIDE ANY ADDITIONAL INFORMATION YOU FEEL MAY BE NECESSARY TO DESCRIBE YOUR FIRMS QUALIFICATIONS. (ATTACH ADDITIONAL SHEETS AS NEEDED.)**



In 2013, after more than 40 years in business and, upon the retirement of my partner, Earl Kai Chann Associates Ltd. closed its doors and, in order to continue serving our clients, I then founded Herzog Associates, p.l.l.c. Two of the work examples referenced in Part 5 of this statement were performed while I was a managing principal of Earl Kai Chann Associates, Ltd.

**A. Organizational Chart:**



**B. Contact Person:**

Herzog Associates, p.l.l.c. operates under a system we call Direct Management. Briefly, Direct Management establishes a principal of the firm, in this case Steven P. Herzog, A.I.A., LEED-AP, as the responsible party for all aspects of this contract.

From general to specific, questions and concerns do not have to be passed through separate levels of management. Consequently, the State of Arizona and the department user's groups will know who to talk to during all phases of the design and construction process.

Direct Management enhances our ability to work on schedule and to produce thorough field investigations and accurate construction documents with a minimum of change orders. In addition, Direct Management allows us to solve unexpected problems quickly. Supported by our highly qualified consulting engineers, we offer creative solutions within the prescribed budget.



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Consistent with Herzog Associates Direct Management approach, the principal-in-charge will assume full responsibility for the construction administration phase for this project.

Working with the contractors as a member of the project team, we attempt to minimize field problems through open communication. The general contractor and the State of Arizona benefit from the principal's firsthand knowledge of the project and, therefore, in reduced response time to the contractor's concerns.

**C. KEY PERSONNEL**

**Steven P. Herzog, A.I.A., LEED AP, Principal**

Steve will act as the principal-in-charge for this project. His responsibilities will include ensuring communication and understanding between our office and the State of Arizona. In addition, Steve will be responsible for scheduling, for coordination with the various engineering disciplines associated with the project, for overseeing the design for the technical specifications for the project and for quality control.

**Georgette Stathis, LEED AP**

Georgette will assist Steve with field verification and with the documentation of existing conditions. She will work closely with Steve to ensure that crucial milestones are met and that timely completion of each project is achieved. Georgette will be in charge of production of the contract drawings. She will ensure that office standards are followed and that particular guidelines required by the State of Arizona are incorporated into the drafting standards.

Both Steve and Georgette will be actively involved in all phases of each State of Arizona project.

**D. TEAM EXPERIENCE**

Herzog Associates has assembled a team of highly-qualified professional consulting engineers with whom we have worked with for more than thirty years. Each firm shares our commitment to fully serving our client's needs, regardless of the project size or scope, with direct involvement of the firm's principals, from start to finish.

**TLCP Structural Engineers, Inc.**

TLCP's experience over the last 17 years includes structural studies and investigations, structural peer review, system selection studies, preliminary and final design, preparation of contract drawings, preparation of specifications and shop drawing review.

Company-wide, TLCP has designed over \$1 billion in construction of commercial and retail buildings. Whether the design calls for a professional complex such as the Mesquite Corporate Professional Plaza in Tucson, or retail buildings such as The Shops at Gainey Ranch in Scottsdale, Arizona, TLCP brings a variety of knowledge and expertise to each project.

TLCP's innovative engineers and CAD experts have extensive experience in analyzing and refurbishing existing structures such as the \$4 million Foothills Mall Renovation and the \$1 million in modifications made to the Pima County Nanini Governmental Center, both of which are located here in Tucson.

**Palmer Engineers, Inc.**

Palmer Engineers, Inc. has been actively engaged in the design of mechanical, plumbing and fire protection systems in the State of Arizona since 1953 when the office opened as John Paul Jones Consulting Engineer. In 1970 the name of the firm was changed to Stewart R. Palmer Consulting Engineers, Inc. and then in 1996 it was shortened to its current name. Through the years Palmer Engineers, Inc. has worked under many open-end contracts similar to this one. Clients that Palmer Engineers, Inc. have performed for under this type of agreement include Pima Community College, Pima County, State of Arizona, Tucson Unified School District, The University of Arizona and NOAO/AURA, as well as open-end contracts held by Herzog Associates, p.l.l.c. (formerly EKC). In the last 15 years, 73% of Palmer Engineers, Inc. total projects have been remodel, renovation, or building addition projects and have included projects performed while the building was in use. Palmer Engineers, Inc. experience is a benefit when remodeling for your facilities.

**Monrad Engineering, Inc.**

Monrad Engineering, Inc. (AZ SBTR Firm License No. 11391) has been in continuous operation since 1983 and is located in Tucson AZ. The firm has provided professional engineering services for over 2800 projects of a diverse and challenging nature, including street lighting, traffic signalization, corporate, municipal, industrial, commercial, justice, collegiate, institutional, aviation, educational, recreational, health-care and hospitality facilities. Monrad Engineering, Inc. holds Pima County and ADOT MBE/DBE status.

MEI provides on-staff LEED Accredited Professional status and Registered Communications Distribution Designer (RCDD) credentials to benefit clients with sole-source full-services consulting engineering solutions (including REVIT 3D BIM capabilities) for the sophisticated high-performance and telecommunications-rich projects of today and of the future.

Monrad Engineering, Inc. is proud to enter its 32nd year of operation. Monrad Engineering, Inc. is professionally managed by three registered Professional Engineers who provide long-lived and continuous service with the firm.



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**Stantec Consulting, Inc.**

Founded in 1954, with a presence in Tucson since 1960, Stantec provides professional design and consulting services in architecture, planning, engineering, interior design, landscape architecture, surveying, and project management. They are currently ranked No. 1 by Engineering News Record as a “Top Southwest Design Firm” (May 2013). With a staff of more than 300 professionals in their Tucson, Phoenix, and Tempe offices and more than 13,000 employees across the North America, they have a local viewpoint enhanced by their ability to draw on the expertise of highly experienced professionals across the country.

Stantec continually strives to balance economic, environmental, and social responsibilities, and is recognized as a world-class leader and innovator in the delivery of sustainable solutions. Their focus is on clients and the community at every stage of a project’s execution, from initial concept and financial feasibility to project completion and beyond. Stantec’s multidisciplinary practice areas serve public and private sector clients in a diverse range of markets.

**Westland Resources, Inc.**

The Westland Resources landscape architecture group has extensive experience providing a wide range of landscape architectural service under various open end or on call contracts. The company has had open end landscape architecture contracts with the City of Tucson and Pima County the last 10 years running. They have also had open end contracts with TUSD and have also worked with TUSD and other school districts as part of architectural open end contracts with Herzog Associates.

Westland Resources has provided services including site landscape design, irrigation design, sports and playfield design, playground design, park design, river park design, native plant inventories and habitat restoration.

Westland understands the importance of responsiveness and of the hands-on approach that is often required for work under open end contracts.

**Compusult**

Compusult was founded in 1983 to provide construction management, scheduling and estimating services. Compusult offers estimates based on very preliminary information to construction documents and change order evaluations. Additionally, Compusult offers constructability reviews and document quality review services. Compusult also provides value engineering assistance. Compusult has an extensive historical database of project costs.

**E. Scheduling**

Steven P Herzog, AIA, LEED-AP, the principal-in-charge will implement the goals, set project policies and define overall tasks, team organization and operation. The principal-in-charge will personally monitor significant activities of the project team to ensure that all critical dates and milestones are met.

A bar chart schedule will be used in weekly team meetings to monitor progress of the project. The principal-in-charge has the authority necessary to re-assign staff and authorize overtime to ensure project milestones are met.

The following tools will be used by the principal-in-charge to assure the timely completion of the project:

Bar Chart Schedule – The schedule includes weekly updates identifying all of the project activities and their milestones and completion dates for the total project as well as the interfacing requirement with consultants.

Weekly Staff Meetings – Meetings will be held with staff for project reviews and quality control. Project schedules are reviewed and additional staff assignments or overtime is authorized to maintain schedules.

Bi-Monthly Project Coordination Meetings – Meetings are held with all consultants for project review and coordination. Representatives from State of Arizona are encouraged to attend these meetings. Project ‘check sets’ are submitted to the client and user groups at predetermined dates allowing all involved to track progress.

**F. Cost Control**

At Herzog Associates, the principal-in-charge, in conjunction with our cost-estimating consultant, completes several cost estimates during the design process including two quantity take-offs during the construction document phase. Recommendations for adjustments are made to insure that the budget is met. This method of construction monitoring has been extremely successful in meeting construction budgets.

**G. Verification of Existing Conditions**

Integral to the success of a complete set of working drawings is a thorough understanding of the project site. We make a point to ensure the entire design team visits the site before design begins to develop an understanding of the existing conditions which will affect the project.

- Analyze site access for pedestrians, bicycles, delivery vehicles and fire department circulation.



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- Review existing-building documentation.
- Confirm existing utility locations.
- Field measure and photograph existing relevant construction.
- Review existing as-built drawings (if available).

**H. Automation Capabilities**

Herzog Associates' computer network consists of Intel-based Windows Seven workstations and a Synology NAS (mirrored). CAD software includes AutoCAD Building Design Suite (subscription based) - AutoCAD 2015, 2016 and Revit 2016.

Peripherals include a HP 800 PS DeskJet plotter and

Back-up via USB drive. We store redundant drives off site.

Herzog Associates relies on a combination of in-house and consultant-based training to ensure staff is current with the latest software functionality.

Our drafting staff is fully trained in the operation of AutoCAD and is prepared to produce electronic documents compatible with State Standards.

**7. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS**

a. Percentage of Total Work Attributable to State, Federal and Municipal Government Work:	80
b. Percentage of Total Work Attributable to Non-Government Work:	20

**8. AUTHORIZED REPRESENTATIVE. The foregoing is a statement of facts.**

Signature: 

Name: Steven P. Herzog, AIA, LEED-AP

Date: 17 December 2015

Title: Managing Member