

# PROFESSIONAL SERVICES BULLETIN 23-1

STATEMENTS OF INTEREST (SOIs) are due by 4:30:00 p.m. (Central Time)

**Due Date: March 17, 2023**

Successful Firm(s) will be notified.

Overall results will be posted on the Illinois Chief Procurement Officer's eProcurement System at: <https://www.bidbuy.illinois.gov/>

## Professional Services Bulletin

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No. 23-1

February 10, 2023

ILLINOIS TOLLWAY web site: [www.illinoistollway.com](http://www.illinoistollway.com)



Illinois Tollway  
2700 Ogden Avenue, Downers Grove, IL 60515

PSB 23-1

February 10, 2023

## **NEW TO THIS PSB**

- Update to Section 2.7 to reflect change in certifying entity for Veteran Owned Small businesses, from Central Management Services (CMS) to the State of Illinois Commission on Equity and Inclusion (CEI).
- Update to Exhibit F VOSB Participation and Utilization Plan to reflect change in certifying entity, from Central Management Services (CMS) to the State of Illinois Commission on Equity and Inclusion (CEI).
- A pre-proposal meeting will be held on Friday, February 17, 2023 at 10:00:00 am (CT).

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# PART I: THE SCHEDULE

## 1.1 CONTACT INFORMATION

Illinois State Toll Highway Authority (ISTHA)  
2700 Ogden Avenue  
Downers Grove, IL 60515

PSB 23-1 Coordinator: [csstaff@getipass.com](mailto:csstaff@getipass.com)

PSB 23-1 Tech Support: [ebuilder@getipass.com](mailto:ebuilder@getipass.com)

PSB 23-1 eBuilder Training: [ebuilder@getipass.com](mailto:ebuilder@getipass.com)

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## 1.2 23-1 OFFICIAL NOTICE

This Professional Services Bulletin 23-1 (PSB 23-1) is the official notice of needed professional services for the Illinois State Toll Highway Authority (“Illinois Tollway”, “Tollway”), as authorized by the Architectural, Engineering, and Land Surveying Qualifications Based Selection Act, (30 ILCS 535/1, *et seq.*). This PSB contains information pertaining to the advertisement for Statements of Interest (SOI) and is part of the Chief Procurement Officer eProcurement System for the Illinois State Toll Highway Authority. PSB **23-1**, including all Exhibits and forms, is available on the Illinois Tollway’s website at: <https://www.illinoistollway.com/doing-business/construction-engineering/bids-bulletins-awards>. Additional information is also posted on the Illinois Chief Procurement Officer’s eProcurement System at: <https://www.bidbuy.illinois.gov/>. For instructions on accessing the Illinois Tollway website, PSB, and Exhibits please refer to the Table of Contents. Instructions on receiving procurement opportunities are included in the “Illinois eProcurement BidBuy Notice” section of this PSB.

### 1.2.1 PSB 23-1 SUMMARY

Information for the e-Builder process for PSB **23-1** can be found in the Public Folder at: <https://app.e-builder.net/public/PublicFolderView.aspx?FolderID={dc0355ee-4323-458e-91b5-547c6655b5f5}>

You will need the following before you can submit an SOI in e-Builder:

- e-Builder resources, including PSB SOI user manual, FAQ file, and videos (see Public Folder link above)
- Webinar Training (see Section 3.7 Useful Links for training webinar registration link)
- e-Builder Login ID (see Section 3.4 Submittal Instructions)
- Firm Code Name (see Section 3.4 Submittal Instructions)

A pre-proposal meeting will be held on Friday, February 17, 2023 at 10:00:00 am (CT).

<https://illinois2.webex.com/illinois2/onstage/g.php?MTID=e3f2cd234d077d729f152ccd48796df4f>

All questions related to this PSB must be submitted electronically through the e-Builder SOI Mailbox at [PSB\\_23-1.01 Questions and RFIs@docs.e-builder.net](mailto:PSB_23-1.01_Questions_and_RFIs@docs.e-builder.net) no later than **March 17, 2023 at 4:30:00 pm (CT)**. The subject line should read: PSB 23-1 Question. Answers will be addressed via an Addendum published on the Tollway website and the Illinois eProcurement site, BidBuy. For e-Builder technical questions, please contact the e-Builder PSB Tech Support: [ebuilder@getipass.com](mailto:ebuilder@getipass.com).

This is not an invitation for bids. Consultants properly prequalified for the projects listed herein may indicate their desire to be considered for selection by submitting an SOI to the Illinois Tollway via the e-Builder PSB **23-1** SOI process.

The Illinois Tollway follows the Qualifications Based Selection (QBS) process mandated by Illinois statute (30 ILCS 535): Architectural, Engineering, and Land Surveying Qualifications Based Selection Act) for selecting qualified Consultants under this PSB.

### **1.3 ACCEPTANCE OF SCANNED SIGNATURES**

Unless otherwise specified, the parties agree that proposals, contracts, certifications and disclosures, and other contract related documents to be entered into in connection with the resulting contract will be considered signed when the signature of a party is delivered by scanned image (e.g. .pdf or .tiff file extension name) as an attachment to the e-Builder PSB SOI process. Such scanned signature will be treated in all respects as having the same effect as an original signature.

#### 1.4 PROFESSIONAL SERVICES BULLETIN NO. 23-1 ITEM INDEX

No.	Project No. / County	Description	Page No.
1	RR-21-9245R / Systemwide	Intelligent Transportation System (ITS) Development and System Management	A-1
2	MO-21-1281R / Systemwide	Systemwide, Pavement Management, Technical Assistance, and Materials Engineering Design Support	A-3

## 1.5 PSB ITEM DETAILS

### 1.5.1 Item 1 - RR-21-9245R, Intelligent Transportation System (ITS) Deployment and System Management.

This project has a 26.0% D/M/WBE participation goal and 3.0% VOS/SDVOSBE participation goal.

Deployment and maintenance services are required to support the installation and continued operation of the Illinois Tollway's ITS that is used to manage and monitor traffic and aid in roadway emergency and incident response.

#### **General Description and Background**

The Illinois Tollway has deployed and operates Intelligent Transportation System (ITS) equipment such as closed-circuit television (CCTV) cameras, vehicle detectors, permanent dynamic message signs (DMS), weigh-in-motion (WIM) systems, Road Weather Information Systems (RWIS) and Lane Control Signs (LCS). This ITS equipment is connected by various Cisco layer 3 switches on a dedicated fiber optic and wireless communication network. These roadside devices and switches are initially configured by the Tollway and provided to general contractor(s) for installation. The devices are operated and managed from a Traffic Operations Center (TOC) located at the Tollway's Central Administration (CA) building in Downers Grove, IL through the Traffic Incident Management System (TIMS) software. The Tollway requires services that shall include issuance of tasks to a general contractor for maintenance and repair work performed through a field maintenance contract, managing tasks issued to the field maintenance contract as well as maintenance and network support services for the ITS equipment.

This contract is anticipated to provide for up to a two (2) year term, with two, (1) one-year option or one (1) two-year option to renew, subject to the Tollway's periodic review, approval and satisfaction with the selected consultant's performance and may be terminated by the Tollway at any time upon a stipulated notice period or extended upon agreement of both parties.

The selected consultant shall provide services that include the following:

1. Program Management - Manage the Tollway's ITS field maintenance contract and oversee ITS network which includes, but is not limited to:
  - Contract administration for the ITS field maintenance contract
  - Monitoring and reporting on the Tollway's field and network devices to ensure uptime requirements are met
  - Manage a preventative maintenance plan as developed and directed by the Tollway
  - Perform plan reviews (Design, Construction, Configuration, Installation) to ensure Tollway specifications are being met
  - Coordination with internal / external Tollway stakeholders
2. ITS Maintenance and Device Configuration – Administer the Tollway ITS maintenance program which includes, but is not limited to:
  - Configure various ITS devices
  - Provide initial trouble ticket triage
  - Provide trouble ticket field investigation and remediation
  - Assign above cabinet trouble tickets to ITS maintenance contractor
  - Attend various internal and external stakeholder meetings

The selected Consultant will provide on-site staff at the CA for support upon request including field technicians able to test and inspect low-voltage networks. The Consultant will be required to have staff available on-call 24/7/365 as required by the Tollway, with an on-site response time of a maximum of two (2) hours, if required.

The prime firm must be prequalified by IDOT in the following category:

#### **Special Services (Electrical Engineering)**

The Tollway will allow a Prime Consultant to meet the prequalification for Special Services (Electrical Engineering) through a subconsultant.

**The prime firm, or their subconsultant, must provide information regarding a minimum of three (3) relevant**

**projects of equal or greater complexity that the firm has provided services for within the past ten (10) years to demonstrate the firm's experience in the type of work required for this project (revises the Professional Services Bulletin Section 3.3.2.3)**

Key personnel listed on Exhibit A for this project must include:

- The person who will assume the duties of the Project Manager for all aspects of the work (must be an Illinois Licensed Professional Engineer).
- The person who will assume the duties of the TIMS Support Engineer. This person is expected to have a strong understanding of the fundamentals of digital communications and will be responsible for monitoring the real-time status of network devices, including the ability to coordinate with contractors and vendors and configure devices as needed.
- The person who will assume the duties of the ITS Maintenance Logistics Technician must have a minimum of three (3) years of experience in civil engineering or construction management related to construction, estimating, scheduling and inventory control.

Schedule: This project is scheduled to start in 2023.

This project will be managed through the Tollway's web-based project management system. The Consultant will be required to utilize and will receive training for the system. The Tollway will furnish the Consultant with guidelines for the Consultant's Quality Program (CQP). The CQP is due fourteen (14) days after Notice to Proceed. The Consultant who is selected for this project will be notified and attend a scope briefing with and scheduled by the Illinois Tollway.



### **1.5.2 Item 2 MO-21-1281R, Systemwide, Pavement Management, Technical Assistance, and Materials Engineering Design Support**

This project has a 20% D/M/WBE participation goal and 3% VOSB participation goal. Phase I Engineering services are required for Pavement Management, Technical Assistance and Materials Engineering Design Support. Services shall include pavement and asset evaluation, testing and condition monitoring, on-site technical support for Tollway Materials, as needed select pavement design and forensic investigation, maintenance and management of the Tollway's materials testing database, support and evaluation on research efforts and general engineering and materials support services; all as described below. The consultant team will work closely with the divisions within the Engineering Department and other key stakeholders within the Tollway.

The selected consultant team may be required to provide engineering services that shall include but not be limited to the following:

#### Pavement and Asset Management and Condition Monitoring –

- Annual collection of digital images and Laser Crack Measurement System sensor data of all lanes, all directions, for the Tollway's mainline pavements with ramp pavements included every other year. Reviewing collected data for visible distresses, combining with sensor data (e.g. wheel path rutting for asphalt surfaces, transverse joint faulting for concrete surfaces, and IRI for all surface types), and processing to calculate Condition Rating Survey (CRS) values according to the established Illinois Department of Transportation methodology
- Provide a determination of the Remaining Service Life (RSL) for each homogenous Tollway pavement segment according to the Tollway's methodology
- Prepare an annual Pavement Management System report. Annual updates of the Tollway pavement management system include updating current construction history, traffic, cost, and pavement condition data to document the actual performance.
- Maintain and update the Tollway's Pavement Asset Management Plan (PAMP) to include CRS, RSL, and smoothness (IRI) values shown over time, and by Mile Post, for Tollway segments. The PAMP is a resource for rehabilitation and reconstruction planning of the mainline pavement and shoulders.
- Update maintenance and rehabilitation activities and quantities as needed
- Maintain and update the Tollway's Ramp Asset Management Plan (RAMP) with CRS, RSL, and smoothness (IRI) values shown over time. The RAMP is a resource for rehabilitation and reconstruction planning of ramp pavement and shoulders.
- Input the latest CRS, RSL, and IRI values to the Tollway asset management software/system (currently Cartegraph)
- On an annual basis, process and deliver a complete set of digital images to the Tollway
- Biennial, or as requested, measurement and evaluation of Tollway pavement surface friction testing
- Annual measurement and evaluation of in-place pavement markings for presence and retro reflectivity and provide recommendations for re-striping where necessary
- Smoothness evaluations across all mainline bridges and associated structural/pavement elements including transition slabs, approach slabs, and the bridge deck
- Maintain records or databases of existing roadway conditions, pavement designs, and provide technical assistance in these areas to Tollway Materials, Maintenance, Planning, and the general Consulting Engineer
- Implementation and updating of asset management systems, including pavement management, sign management, pavement marking management, and maintenance management

Support services –

- Maintain and manage the existing Illinois Materials Information and Reporting System (I-MIRS), which is a web-based SQL Server Relational Database material testing data submittal and archive system that captures the quality data for all aggregate, concrete, and asphalt delivered to Tollway construction projects. The consultant will be responsible for integration of new functions as needed by the Tollway, and for training other consultants under contract with the Tollway on the use of the I-MIRS system.
- Provide an evaluation of current I-MIRS system to include upgrades or potential replacement to ensure proper QC/QA compliance; includes the ability to report and proactively identify deficiencies and/or provide a tool to assist in ensuring compliance with specifications. Potential upgrades may include statistical analysis of data to potentially align with IDOT or FHWA specifications as well as capabilities to include mining or analyzing data for future research or specification upgrades, as well as ability to integrate and/or communicate with other Tollway systems.
- Evaluation and reporting on the condition of assets maintained by Tollway maintenance forces via the Maintenance Quality Assurance (MQA) program, developed to identify and monitor the effectiveness of the Illinois Tollway's roadway maintenance efforts. Consists of biennial in-field evaluation of assets and the associated maintenance activities, providing ratings for the Tollway's drainage, roadside, safety, and pavement assets, allowing Tollway managers to evaluate their success at meeting or exceeding roadway maintenance goals.
- Assist the Tollway with engineering research projects performed by others
- Surveying of mainline bridge decks using GPR to determine the extent of deterioration and depth-to-steel reinforcement
- Monitor, evaluate and consult on new and existing pavement and pavement marking test sections and pilot projects
- Periodic data takeoff and analysis to quantify and evaluate Tollway assets from vehicle imagery on as-needed basis
- Assist the Tollway in the development and refinement of pavement and related infrastructure design standards and construction specifications
- Assist the Tollway in developing pavement and structural rehabilitation and reconstruction methods and material improvements based upon the latest research and performance information
- Assist with the Tollway's evaluation of sustainability of Tollway practices and projects via the Tollway's INVEST program and calculation of environmental impacts; the consultant shall assist the Tollway to summarize the results of all sustainability measurements in an annual report
- Provide engineering support to assist the Tollway with design reviews, development and revisions to Special Provisions and Tollway Standards, and various other related support tasks as required by Tollway Engineering including analysis and investigation of related infrastructure topics and issues critical to the Tollway during the delivery of the capital program
- Work closely with the divisions within the Engineering Department and provide direct materials engineering support to Tollway Materials including full time on-site materials engineering support for field and office materials engineering tasks. The consultant will also coordinate activities and products with other consultants under contract with the Tollway

The Tollway will furnish to the selected consultant team all necessary background files, models, access to historic data, source code, manuals and relevant documentation to facilitate productive startup of services under new contract.

There is no IDOT prequalification requirement for Systemwide Pavement Infrastructure Management services: However, the consultant, either directly or through their subconsultants, must demonstrate that they are equipped and have experience with the following:

- Digital pavement survey vehicle that includes a Laser Crack Measurement System (LCMS) to acquire high resolution 3D pavement profiles and a 360° panoramic imaging system
- Performing pavement condition surveys
- Falling weight deflectometer
- Ground Penetrating Radar for pavement and bridge deck analysis
- Locked wheel friction tester
- Mobile and handheld pavement marking retro reflectometers

The Consultant must demonstrate experience, either directly or through their subconsultants, using the following systems:

- AASHTO Pavement ME Design
- I-MIRS and/or demonstrated experience working in SQL RDS environment
- Pavement management software

Key personnel listed in Exhibit A for this project must include:

- Project Manager – Responsible for overall team management, schedule, and budget for this coordinated program. Must be an Illinois\* Licensed Professional Engineer who has demonstrated minimum five (5) years of experience in infrastructure/pavement engineering and managing projects of similar size and complexity.
- Pavement Design Engineer – Responsible for responding to pavement design and forensic requests for Tollway mainline, ramp, and maintenance yard pavements. Must have demonstrated use of AASHTO Pavement ME Design software is required, including design examples for CRCP, JPCP, full depth HMA, and Jointed Plain Composite for interstate-type pavements. Must be an Illinois\* Licensed Professional Engineer.
- Pavement Management Engineer – Responsible for coordinating and scheduling field data collection, data processing, reporting results, and uploading information to Tollway platform. Experience with GIS is preferred. Experience developing long-range (> 20 year) maintenance and rehabilitation plans for interstate-type pavements is required.
- On-Site Materials Engineer – Provides engineering support to assist Tollway Engineering with design and construction of materials and pavements. Materials will primarily include asphalt, concrete, aggregate, earthwork, and manufactured products such as metal structures and precast concrete. Projects may vary from construction of a new roadway system to projects for repair, replacement, or modifications of existing facilities, roadways, or structures. The materials engineer will need to be able to report to the Tollway headquarters on a daily basis. Duties of the materials engineer will include, but is not limited to:
  - Review plans and specifications during design development to verify compliance with current Tollway standards and practices
  - Develop and revise Tollway Special Provisions, Manuals, and Standards to reflect best practices and advancements in the areas of materials and pavements

- Review QC plans and mixture designs for asphalt and concrete to verify compliance with specifications
- Assist in review and assessment of Contractor Quality Plans and adherence to plans
- Identify, analyze and recommend methods to resolve any deviation from materials requirements or issues during construction
- Coordinate off-site inspection with other consultants for precast, metal, and manufactured items
- I-MIRS User Support Liaison – Responsible for responding to I-MIRS user issues as necessary, providing training to internal/external users. Experience using the IDOT QC/QA. Excel package and Tollway I-MIRS web site is preferred.

\*A professional engineer that is licensed in another state can be proposed for this role, but the individual(s) will need to be licensed in Illinois before performing work on this contract.

Schedule: This project is scheduled to start in Fall 2023. Substantial completion of this project is anticipated to be 48 months after authorization to proceed.

This project will be managed through the Tollway's web-based project management system. The Consultant will be required to participate in these procedures and will receive training on the system. The Tollway will furnish the Consultant with guidelines for the Consultant's Quality Program (CQP). The CQP is due fourteen (14) days after Notice to Proceed. The Consultant who is selected for this project will be notified and scheduled to attend a scope briefing with the Illinois Tollway.

## **PART II: CONTRACT CLAUSES AND REQUIREMENTS**

### **2.1 CONSULTANT /SUBCONSULTANT CONFLICTS OF INTEREST WITHIN TOLLWAY PROJECTS**

Professional engineering services performed under contracts with the Illinois Tollway shall be performed in accordance with the highest standards of professional behavior and highest principles of ethical conduct. Such services must be provided with honesty, impartiality, fairness and equity and must be dedicated to the protection of public health, safety and welfare.

Prime Consultants submitting a Statement of Interest (SOI) shall disclose any known or potential conflicts of interest the Prime Consultants may have.

The selected Prime Consultant shall be required to submit a Consultant Quality Program (CQP) to the Illinois Tollway, which shall be subject to approval by the Illinois Tollway. As part of the CQP, Prime Consultants shall identify any known or potential conflicts of interest, including any known or potential conflicts of interest identified by any of their Subconsultants. The CQP also shall outline the plan for monitoring known conflicts and identifying potential conflicts through the duration of the contract, as well as describe, in detail, procedures relative to ethical screens and other procedures for mitigating conflicts. If additional conflicts of interest or potential conflicts of interest are identified during the administration of the contract, the Prime Consultant will be required to submit an updated CQP.

Periodically, the Illinois Tollway solicits Professional Services for foundational contracts, which include the Program Management Office (PMO), Consulting Engineer (CE), and Traffic Engineer (TE) contracts. The overarching engineering services provided pursuant to foundational contracts involve all or the majority of all other Illinois Tollway Professional Services contracts, and the foregoing provisions of this Section 2.1 are fully applicable to the PMO, CE and TE contracts.

Foundational contracts prohibit the PMO, CE and TE from performing new services for the Illinois Tollway during the pendency of the respective PMO, CE, or TE contract (including extensions). "New services" as used herein includes, but is not limited to, work or services awarded to a person or entity not affiliated with the PMO, CE, or TE that, subsequent to the award of the PMO, CE, or TE contract, is acquired, becomes controlled by or otherwise becomes affiliated with the PMO, CE, or TE. The PMO, CE, and TE are required to notify the Illinois Tollway, in advance, of any such acquisition, assumption of control or affiliation.

Notwithstanding the provisions of the CQP or any other provisions of this Section 2.1, the Illinois Tollway reserves the right to assess and require appropriate corrective action, as determined by the Illinois Tollway, relative to any conflict or potential conflict issues involving a professional firm, professional individual, PMO, CE, or TE. Relative to conflicts and potential conflicts, Prime Consultants must be responsive to the Illinois Tollway so that appropriate steps can be taken to mitigate any such circumstances.

Consistent with the foregoing, professional firms should conduct their operations using common sense and professional judgment. Professional firms should not place their firms in inappropriate situations or create any unfair advantage for their firms.

This notice is not intended to address any potential conflicts of interest ruled upon by the Chief Procurement Officer and/or the Procurement Policy Board under the Illinois Procurement Code (30 ILCS 500/1, et seq.). Violations of this Section may result in termination of contracts for cause or the Illinois Tollway declining to award work, projects or contracts.

## 2.2 INSPECTOR GENERAL

The Vendor hereby acknowledges that pursuant to Section 8.5 of the Toll Highway Act (605 ILCS 10/8.5) the Inspector General of the Illinois State Toll Highway Authority (“OIG”) has the authority to conduct investigations into certain matters including but not limited to allegations of fraud, waste and abuse, and to conduct reviews. The Vendor agrees that it will fully cooperate in any OIG investigation or review and shall not bill the Illinois Tollway for such time. Cooperation includes, but is not limited to, providing access to all information and documentation related to the goods/services described in any Agreement entered into in connection with this PSB, and disclosing and making available all personnel involved or connected with these goods/services or having knowledge of these goods/services. All subcontracts must inform Subconsultants of this provision and their duty to similarly comply and cooperate with any OIG investigation or review.

## 2.3 FINANCIAL INFORMATION

### 2.3.1 DIRECT LABOR MULTIPLIER

The Direct Labor Multiplier to be used on projects advertised in the PSB is as follows:

Phase I and II (Studies, Design, and Survey)	2.8
Phase III (Construction Management)	2.8
Project Staff at Illinois Tollway Facilities	2.5

- The 2.5 multiplier applies to contracts with personnel permanently assigned to an Illinois Tollway facility, such as the Central Administration Building (CA). The 2.5 multiplier does not pertain to personnel assigned to construction field offices for Phase III (Construction Management).

The Direct Labor Multiplier for specialty engineering services, such as Aerial Mapping and LiDAR, will be based upon the firm’s current overhead determined during initial contract negotiations between Tollway and Consultant.

### 2.3.2 OTHER CONTRACTING METHODS

The Illinois Tollway, in its sole discretion, may consider, when it is in the best interest of the Illinois Tollway, other payment methodologies in lieu of the Direct Labor Multiplier. Other considerations include “flat rate” or “lump sum” methodology that would be further defined at the time of negotiations between Tollway and Consultant. Other payment methodologies could negate or alter section 2.3.1 Direct Labor Multiplier.

### 2.3.3 ESTIMATED CONSTRUCTION COST OF PROJECTS

The estimated construction cost of each project is presented in the following categories or may be specific to a project detail. This is to assist the Vendor in determining the relative size of the project. The construction cost category will be included in each Item. The categories are:

CATEGORY	ESTIMATED CONSTRUCTION COSTS
A	\$0M - \$ 10M
B	\$ 10M - \$ 25M
C	\$ 25M - \$ 50M
D	\$ 50M - \$ 75M
E	\$ 75M - \$100M
F	Over \$100M

### 2.3.4 ALLOWABLE DIRECT COSTS

The Allowable Direct Cost and Allowable Direct Cost –Construction Inspection list is available on the Illinois Tollway’s website at:

**The Illinois Tollway will allow the Vendor to negotiate their Direct costs and bill as a lump sum on the contract.**

## **2.4 ILLINOIS TOLLWAY'S CONTRACT PAYMENT POLICY**

The Illinois Tollway will not issue payments under contracts for costs incurred during the preceding calendar year if any invoice for that work is received after February 28th of the subsequent State of Illinois fiscal year. This policy enables the Illinois Tollway to close its financial books both on time and accurately. To meet the requirements of Generally Accepted Accounting Principles and those of the Illinois Auditor General and external auditors, the Illinois Tollway must account for all of its expenditures for a given calendar year before the end of the subsequent February. This policy includes payment of any "re-bill" issues that may arise. The Illinois Tollway is unable to make any payments for work in a given calendar year if it has not been properly invoiced to the Illinois Tollway by February 28th of the following year.

## **2.5 DISADVANTAGED BUSINESS ENTERPRISE (DBE) PARTICIPATION**

The Illinois Tollway hereby notifies all respondents that it will affirmatively ensure that in any contract entered into pursuant to this solicitation, disadvantaged, minority, women-owned business and Small Business Administration (SBA) 8(a) enterprises are encouraged to submit a SOI response to this invitation and/or to participate in the advertised Disadvantaged Business Enterprise (DBE) goal of the work to be performed under the contract as a Subconsultant.

**Any agreement between a Consultant and a DBE or other Subconsultant in which the Consultant requires that the Subconsultant not provide professional services proposals to other vendors is prohibited.**

To qualify as an eligible DBE, the firm must be currently certified by one of the following agencies currently participating in either (A) the Illinois Unified Certification Program (IL UCP); (B) the City of Chicago, Illinois; or (C) the County of Cook, Illinois, as a Minority or Women-Owned Business ("M/WBE") pursuant to their M/WBE programs; or (D) it must be currently participating in the Small Business Administration SBA 8(a) Program. A DBE is considered to have current certification if the firm is listed in the directory database of the pertinent certifying agency:

- IL UCP - Illinois Department of Transportation (IDOT)
- IL UCP - Chicago Transit Authority (CTA)
- IL UCP - PACE
- IL UCP - METRA
- IL UCP - City of Chicago
- City of Chicago – M/WBE
- Cook County, Illinois – M/WBE
- Small Business Administration SBA 8(a)

**Each DBE firm utilized must be listed in a certifying agency's database at the time of the expiration of the extended documentation period, if utilized, as described below to be considered acceptable. Please provide proof of certification (example: letter) with your SOITEAM submittal (Certifications are to be included as attachments to Exhibit F – VOSB Letter of Intent and Exhibit H DBE Letter of Intent). Certification letters must be current, and DBE and VOSB vendor's scope(s) of work stated in the SOI and Letter of Intent (LOI) must match the area(s) of specialty specified in the DBE's or VOSB's certification letter. Failure to provide the required DBE/VOSB participation/utilization information in the SOITEAM may result in the SOI being deemed non-responsive.**

You can view/print and download the most current listing of DBE firms at:

- IDOT's web site: <https://webapps.dot.illinois.gov/UCP/ExternalSearch>
- City of Chicago's web site: <https://chicago.mwdbe.com/FrontEnd/VendorSearchPublic.asp>

- County of Cook, Illinois' web site: <https://cookcounty.diversitycompliance.com/FrontEnd/VendorSearchPublic.asp?XID=2768&TN=cookcounty>
- Small Business Administration's SBA 8(a) web site: [http://dsbs.sba.gov/dsbs/search/dsp\\_dsbs.cfm](http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm).

If a Vendor cannot obtain sufficient DBE commitments to meet the contract goal, the Vendor must document its good faith efforts to meet the goal, including any DBE participation secured, and request a partial or full waiver of the contract goal. Demonstrating good faith efforts means that the Vendor must show that all necessary and reasonable steps were taken to achieve the contract goal, meaning those steps that could be reasonably expected to obtain sufficient DBE participation. Mere pro forma efforts are not good faith efforts, and the documentation must be supported by backup evidencing contact attempts and results made by the Vendor to DBE firms. Vendors should not submit pricing information received from DBE firms with the good faith efforts documentation.

Examples of good faith efforts and the contact log are available in the List of Documents, Exhibit F, Section 7.10 of the State of Illinois Veteran Small Business Participation and Utilization Plan and in Exhibit H, Section 6.5 of the Tollway DBE Participation, Utilization Plan and Letter of Intent for Professional Services.

For "Upon Request" projects: the Illinois Tollway may consider a goal adjustment or waiver request if and when a task order is issued for an upon request project which provides a detailed scope of work and the awarded Vendor requests an adjustment when it submits a proposal to complete the task order.

**Extended Documentation Period for Vendors with a Technical Issue as determined by the Illinois Tollway related to the DBE and VOSB Commitment Made on a SOI:**

**All required DBE/VOSB documentation must be completed to the fullest extent possible and submitted with the SOI, including the signed DBE/VOSB Letters of Intent (LOI) and SOITEAM. The SOITEAM data will take precedence.**

**NOTE: the percentage inserted in the SOITEAM will take precedence over any other percentage inserted in the LOI data in the event of a discrepancy.**

Each Consultant submitting a SOI who has a DBE/VOSB commitment with a technical issue as determined by the Illinois Tollway related to DBE/VOSB participation that is identified during initial review of a SOI by the Illinois Tollway shall be allowed, upon an email notification from the Illinois Tollway, an extended documentation period which will extend until 5:00 pm CT on the second business day after the day the notification is sent (e.g. if a Consultant is notified on Monday, extended documentation period concludes on Wednesday at 5:00 pm).

The extended documentation period allows a Consultant solely to correct their initial SOITEAM data to add or adjust DBE/VOSB participation to:

- Meet or exceed the initial DBE/VOSB commitment stated in the SOI, if that initial commitment was above the advertised DBE/VOSB goal, or
- Meet or exceed the goal, if the initial DBE/VOSB commitment stated in the SOI was below the advertised DBE/VOSB goal.

The Consultant shall submit updated SOITEAM data and LOI if additional or adjusted DBE/VOSB participation is secured by the end of the extended documentation period.

Under no circumstances is a Consultant allowed to remove, replace or reduce the DBE/VOSB participation of a certified DBE/VOSB firm listed in the initial LOI and SOITEAM data without prior written consent of Illinois Tollway. Increases to DBEs/VOSBs listed in the initial LOI and SOITEAM data are allowed. Under no circumstances is the Consultant allowed to change any documentation unrelated to the correction of the technical issue identified. Any adjustment made to the DBE/VOSB portion of the LOI and SOITEAM data during the extended documentation period must include a brief statement describing the revision(s) with resubmittal of the LOI and SOITEAM data. Any other changes to the original SOI will not be accepted.

**Illinois Tollway Disclaimer Statement: Disadvantaged Business Enterprises (DBE) Directory, City of Chicago or Cook County, Illinois Minority and Women-Owned Business (M/WBE) Directories, or Small Business Administration SBA 8(a) Directory**



Firms listed in either the Illinois Unified Certification Program (IL UCP) Disadvantaged Business Enterprises Directory or the City of Chicago Minority and Women-Owned Business Directory have been certified as a Disadvantaged Business Enterprise (DBE) by one of the IL UCP participating agencies (Illinois Department of Transportation, City of Chicago, Chicago Transit Authority, Metra and Pace) or by the City of Chicago. Firms listed in the County of Cook, Illinois M/WBE Directory have been certified as Minority or Women Owned Business Enterprises by the County of Cook, Illinois. Firms listed in the Small Business Administration SBA 8(a) Directory have been certified as SBA 8(a) business enterprises by the Small Business Administration.

The criteria, standards and procedures by which certification decisions are made can be obtained from any of the certifying agencies. These directories are to be used as an “informational source only” and the following must be considered:

- Certification does not mean that a firm is in any way prequalified to provide the products and/or services the firm claims it can provide. “Certification” means that the certifying agency has determined, on the basis of information provided and the representations therein, that a business is a bona fide DBE. The certifying agency does not, as a result of any listing, make any representation concerning the ability of any listed firm to perform work in the specialty listed;
- The Illinois Tollway does not, through its use of, and referral to, certification lists, make any representation concerning the ability of any listed firm to perform work in the specialty listed.
- The Illinois Tollway, in awarding a contract, has discretion in determining whether a DBE firm’s listed work categories are eligible to be counted toward the fulfillment of DBE contract goals; and
- It is the responsibility of all vendors to:
  - a) Conduct their own investigation to determine the capability and capacity of the DBE firm(s) to satisfactorily perform the proposed work; and
  - b) Ensure the DBE firm(s) is currently certified. A DBE is considered to have current certification if the firm is listed in the directory database of the pertinent certifying agency.

These directories list the most current certified firms. If there are any questions concerning these directories, please contact the certifying agency.

For more details about DBE utilization/participation, good faith efforts and related documentation requirements, refer to Exhibit H.

## **2.6 PARTNERING FOR GROWTH PROGRAM GUIDELINES (formerly Partnership-Mentor/Protégé Program Guidelines)**

The Partnering for Growth Program and Documents have been updated effective December 2021 to include the Reverse DBE\_VOSB P4G Exhibit E and the standard DBE\_VOSB P4G Exhibit E. Both are available on the Illinois Tollway’s Website at:

[Partnering For Growth - Illinois Tollway](#)

The Partnering for Growth Program applies to both Disadvantaged Business Enterprises (DBE) and Veteran-Owned Small Businesses (VOSBs) firms. Separate Exhibit E’s – Partnering for Growth Program and Reverse Partnering for Growth forms are available for use for either a DBE or VOSB. Vendors may have multiple Partnering for Growth agreements in either the DBE and/or VOSB category(ies) and may have partnerships with both.

## **2.7 STATE OF ILLINOIS VETERAN SMALL BUSINESS PARTICIPATION AND UTILIZATION PLAN**

This solicitation includes specific Veteran Small Business participation goal(s) as specified in each Item detail based on the availability of CEI-certified veteran-owned (VOSB) vendors to perform or provide the anticipated services required by this solicitation. The Veteran Small Business participation goal is applicable as specified in each Item detail. In addition to the other award criteria established for this solicitation, the Illinois Tollway will award contracts under this PSB to a Vendor that meets the goal or makes good faith efforts to meet the goal. Vendor must submit a Utilization Plan and Letter of Intent with its SOI. Refer to PART III, List of

Documents, Exhibits, and Other Attachments, for submittal instructions. As stated in Exhibit F, to qualify as an eligible VOSB the firm must be currently certified, at the time of the Professional Services Bulletin due date, by the State of Illinois Commission on Equity and Inclusion. Registration is available at: <https://ceibep.diversitysoftware.com>

## 2.8 TEAMING AGREEMENT

The action of joining forces with another vendor to submit on a Professional Services Bulletin (PSB) is called Teaming. All former policies and procedures referring to Joint Venture still apply, with Teaming as the name of the effort.

Team SOIs shall comply with the same requirements set forth for individual SOIs, including, but not limited to, the submittal (under the Team's SOI code name) of the SOI, SOITEAM data, Exhibits, and Disclosures. A Team SOI represents a unique submittal and shall not be combined with an individual SOI from the Team Lead or submittals from other, unique teams.

Team members and a Team Leader must clearly be identified with the SOI submittal, and Team Lead shall be considered the Prime Vendor upon selection. A Team Lead can only select one D/M/WBE category but may provide evidence of multiple certifications by attaching any supporting documentation in the attachments tab before submitting. The selection criteria for the Team will include the Team members' prequalification categories, and the sum of the individual firm's work capacity and evaluation history.

The Illinois Tollway requires the Team to **self-perform no less than 40%** of the work, meaning the Team cannot subcontract more than 60% of the project work. The scope of work to be performed by each Team member and its Subconsultants must be clearly defined and leave no room for interpretation in the SOI. Each Team member must make a substantial contribution to the performance of the work being completed by the Team. Factors that may be considered by the Illinois Tollway, in its sole discretion, in determining what constitutes a substantial contribution include, but are not limited to, the number of participants in the Team, the professional qualifications of each member, and the nature of the work being performed.

The Illinois Tollway **DOES NOT** have a form for Teaming Agreements. However, the firms submitting as a Team are required to obtain and submit their Teaming Agreement. A Teaming Agreement, signed by all members, **MUST** be submitted within ten (10) business days after contract negotiations and prior to Board award. The Teaming Agreement will clearly identify the Team members, their percentage interest / share, as well as respective rights and responsibilities. The Teaming Agreement shall further designate a Team Lead who will assume responsibility for invoicing. **The Team may have no more than three participants.**

Each Team member shall procure and maintain separate insurance policies that meet the Illinois Tollway's insurance requirements. The Tollway's standard insurance requirements are set forth in the Vendor Agreement boilerplates (See Illinois Tollway website: <https://www.illinoistollway.com/doing-business/construction-engineering/forms> under Doing Business> Construction and Engineering: Vendor Resources under Vendor Forms). Each Team member will procure and maintain policies that meet the Prime's required level of coverage and shall indemnify the Team and the Tollway against claims arising from their performance under the Team, as well as agreeing to remain joint and severally liable upon termination of the Project and/or the Team. In the event of the termination of the Team, the insurance and indemnification rights of the Team must be assignable to the Illinois Tollway as a matter of law. Proof of compliance with these requirements must be submitted to the Illinois Tollway prior to issuance of the Illinois Tollway's Notice to Proceed.

Team SOI submittal requirement overview:

- Designate a single point of contact who shall serve as the Team's primary contact with the Illinois Tollway.
- Indicate the Team member responsible for each prequalification category.
- The Team Lead shall submit outstanding work obligations, and Vendor Disclosures (formerly Forms A) or IPG Active Registration Vendor Disclosures (formerly Forms B) (as applicable) for each of the Team members.
- Identify the Team member responsible for invoicing.

- For Exhibit A, plus other required documents specified in the PSB, combine the information for all participating Team members.
- Submit the Teaming Agreement within ten (10) days after contract negotiation and prior to Board award.

A firm planning to submit a SOI as a Team is required to contact the Illinois Tollway for a Team SOI Firm Name Code. Contact CS staff via e-mail at [csstaff@getipass.com](mailto:csstaff@getipass.com). The Team SOI Firm Name Code as provided by the Illinois Tollway is required to identify and process the submittal as a Team proposal.

Only the Team Lead is required to fill out the SOITEAM data on behalf of the Team. It is imperative that the other Team members do NOT submit SOITEAM data if they are not the Team Lead. The Team Lead must clearly identify the Team members and Subconsultants doing work for or in conjunction with the Team within the Team SOITEAM data submittal.

Example of a Team (TM) submittal: Companies forming Team are:

- Company A
- Company B
- Company C
- Team Firm Name Code as provided by the Illinois Tollway is: ABC\_TM

Team members naming parameters are:

- ABC\_TM (Company A) "Managing Partner"
- ABC\_TM (Company B)
- ABC\_TM (Company C)
- Subconsultants to the Team Lead: J. Smith Consulting (Company B)
- F.J. Engineering (Company C)
- Subconsultants to the Team members: G. Engineering (Company A)
- Materials Inc. (Company A)
- Surveying Services (Company B) Jersey Consulting (Company B) KL Services (Company C)
- LMN Engineering (Company C)

## 2.9 MANUALS, PROCESSES AND GUIDELINES

Manuals are available on the Tollway website to provide guidance on contract requirements, procedures and responsibilities.

<https://www.illinoistollway.com/doing-business/construction-engineering/manuals-processes-guidelines#Construction%20and%20Materials>

### 2.10 PHASE III: CONSTRUCTION ENGINEERING SERVICES

The following applies to all Phase III Engineering service items.

After the Consultant has been selected, the Construction Manager (CM) shall provide the following to the Illinois Tollway:

The Consultant selected for the Construction Management (CM) Services shall submit for the Illinois Tollway's review and approval, a management plan for the specific Project(s) for which the Consultant is selected. This management plan shall include an outline of the full-time or part-time plant, on-site inspection services, sampling and laboratory testing the Consultant is providing for Quality Assurance. The selected CM's Consultant's Quality Program (CQP) shall include the identification and pre-qualifications of the Field Inspectors and Laboratory Technicians to be assigned to this project as employees of the Consultant or a qualified Subconsultant. The CQP shall include periodic verification by an independent qualified Subconsultant that the Quality Assurance operations are proceeding as specified using the proper methods of sampling and testing.

The name of any accredited material laboratory(ies) to be utilized for the quality assurance work must be provided with the CQP. The laboratory must be accredited under the AASHTO Accreditation Program (AAP)

for all required test procedures specified in IDOT Bureau of Materials Policy Memorandum "Minimum Private Laboratory Requirements for Construction Materials Testing or Mix Design."  
<http://idot.illinois.gov/home/resources/Manuals/Manuals-and-Guides>

## 2.11 CONSTRUCTION AND QUALITY ASSURANCE CONSULTANTS

Personnel performing materials testing for aggregate, PCC, and HMA shall have completed the appropriate IDOT Quality Management Training Program classes. Personnel performing soils inspection and field tests shall have completed IDOT class S-33, Soils Field Testing and Inspection.

The Field Inspectors assigned to any project under this PSB for on-site Quality Assurance for earthwork quality control and for monitoring the on-site asphalt construction work must be prequalified by having passed the IDOT Nuclear Density training course. The Field Inspectors assigned to the on-site quality control of concrete placement shall be prequalified by having passed the IDOT/ACI Portland Cement Concrete Level I training course. Personnel performing soils field tests shall have completed IDOT class S-33, Soils Field Testing and Inspection.

The Vendor's Quality Assurance responsibilities at the material production plants shall be performed by a Field Inspector having passed IDOT Level I and Level II (HMA and PCC) training courses to perform the specified inspection of approved materials at the concrete and asphalt plants.

## 2.12 QUALITY ASSURANCE PREQUALIFICATION CATEGORY

The prequalification requirements for Quality Assurance Testing is required and will follow the guidelines set by IDOT in the Prequalification information "Description and Minimum Requirements for Prequalification" in section J.12 SPECIAL SERVICES - Quality Assurance Testing.

The information about the Quality Assurance Testing prequalification is located at:  
<https://idot.illinois.gov/Assets/uploads/files/Doing-Business/Manuals-Guides-&-Handbooks/Highways/Design-and-Environment/Description%20And%20Minimum%20Requirements%20For%20Prequalification.pdf>

## 2.13 CLARIFICATION OF QUALITY CONTROL/QUALITY ASSURANCE REQUIREMENTS

The Quality Control/Quality Assurance personnel on Exhibit A shall not be the same personnel preparing the data. If the prime firm does not have personnel to cover the QC/QA requirements, then a Subconsultant prequalified in the category may be used.

The following highlighted sections have been added to the Guidelines in the Professional Services Bulletin and the solicitations.

Complete **Exhibit A** as follows:

- List the required key personnel to match required prequalification categories and any additional personnel requirements designated in the project solicitation. Include firm name if work is to be completed by a Subconsultant; and
- QC/QA personnel must be different individuals than those preparing the design documents.

## 2.14 CONSULTANT CONTRACT FORMS

Standard forms exhibits and associated instructions to be used by Construction Management (CM) and Design Services Engineering (DSE) Consultants in preparing proposals and agreements with the Illinois Tollway are located on the Illinois Tollway website. Contracts will be awarded based on the standard Agreement templates. Selected Consultants should be prepared to execute the appropriate Agreement template. Any exceptions shall be noted in the Consultant's SOI.

<https://www.illinoistollway.com/doing-business/construction-engineering/forms>

## **2.15 SELF-PERFORMANCE**

**The Illinois Tollway requires the stand-alone firm (non-team) to self-perform no less than 40% of the work.**

## **PART III: REPRESENTATIONS AND INSTRUCTIONS**

### **3.1 SELECTION CRITERIA**

Members of the Vendor Selection Committee will not be available to discuss specifics of projects listed in this PSB between the date of the submittal and the Selection Committee meeting. Please do not send letters or e-mails expressing interest in specific projects to members of the Vendor Selection Committee.

Selection of professional Vendors by the Illinois Tollway is based on the firm's professional qualifications, related experience, expertise, and availability of key personnel to be assigned to the project, satisfaction of diversity goals and contract compliance and what is best for the Illinois Tollway. SOIs will be evaluated based on the following criteria:

- Specialized experience when required, technical competence of the personnel, and experience of the firms and/or Subconsultants proposed;
- Performance history and expertise of the firm and any proposed Subconsultants with the work described in the Item;
- Particular attention will be given to appropriate cost saving measures and innovative ideas that will benefit the Illinois Tollway;
- Ability to complete the work in the time required and the firm's existing workload;
- Commitment and availability of Key Personnel during the term of the contract;
- Proposed method of accomplishing the project's objectives;
- Demonstrated understanding of an inclusive and substantive DBE/VOSB utilization plan; and
- Contract Compliance will evaluate submitted forms and documents, including but not limited to the SOI, LOI, and DBE/VOSB certification(s) for completeness, accuracy and verification that all requirements of the PSB have been met.

Consideration will also be given to the quality and scope of utilization plan which demonstrates an understanding of an inclusive and substantive DBE and VOSB U-Plan (Reference Section 2.5 and 2.7 for definition of "DBE" and "VOSB"), VOSB and Partnering for Growth (formerly Mentor Protégé proposals).

Consideration will also be given to the completeness and content of the compliance documentation submitted (SOI and LOI), whether the submitted documents show that at least the advertised diversity goal(s) has/have been met, and if the certification letters submitted are current and the area(s) of specialty as certified match with the scopes of work of the respective DBE/VOSB participants.

**3.2 SCHEDULE FOR VENDOR SELECTION**

The Illinois Tollway anticipates selecting Vendors based on the estimated schedule below: Representatives from the Illinois Tollway will contact selected firms to schedule introductory meetings.

TASK	DATE DUE
Publish	February 10, 2023
Pre-proposal meeting 10:00:00 a.m. Central Time	February 17, 2023
Last Day for Questions no later than 4:30:00 pm Central Time	March 7, 2023
Complete SOIs are due no later than 4:30:00 pm Central Time on this date, including all required Attachments/Exhibits as specified in this PSB.	March 17, 2023
<b>Selection Committee Meeting:</b>	March/April, 2023
Estimated Board Approval	May 2023
Estimated Notice to Proceed	July 2023

**3.3 GUIDELINES FOR SUBMITTING STATEMENTS OF INTEREST (SOI)**

The firm acting as the prime must be prequalified in all of the prequalification categories requested in the project advertisement even if they plan to subcontract part of the project, except where noted in a specific project advertisement. Any Vendor, prime or sub must be prequalified by IDOT in the category of work they are performing or as stated in the item description, unless the Subconsultant is being mentored in the Partnering for Growth Program. SEE NOTICE BELOW.

**3.3.1 REQUIRED FORMAT FOR SUBMITTING STATEMENTS OF INTEREST**

**3.3.2.1 THE FOLLOWING EXHIBITS AND DATA SHALL BE SUBMITTED IN ACCORDANCE WITH THE PSB SUBMITTAL INSTRUCTIONS AND SHALL BE DOWNLOADED FROM THE ILLINOIS TOLLWAY WEBSITE. ALL EXHIBITS SUBMITTED FOR THIS PSB MUST BE CURRENT. EXHIBITS FROM PREVIOUS PSBs WILL NOT BE ACCEPTED.**

- Exhibit A: Proposed Staff
  - Required - Submit as a separate pdf document.
  - Must include resumes
- Exhibit C: Instructions for Completing Exhibit C and Current Obligations form
  - Required - Submit as a separate pdf document.
- Exhibit D: Availability of Key Project Personnel
  - Required - Submit as a separate pdf document.
- Exhibit E-DBE/VOSB: Partnering for Growth Program
  - If proposing a mentor-protégé arrangement with a DBE or VOSB firm, this Exhibit is required.
  - Submit as a separate pdf document.
- Exhibit E- Reverse DBE/VOSB: Partnering for Growth Program
  - If proposing a mentor-protégé arrangement with a DBE or VOSB firm where the subconsultant is mentoring, this Exhibit is required.
  - Submit as a separate pdf document.

- Exhibit F: Veteran Small Business Participation and Utilization Plan
  - If the item includes a Veteran Goal, this Exhibit is required.
  - Submit as a separate pdf document.
- Exhibit H: DBE Participation and Utilization Plan
  - If the item includes a DBE Goal, this Exhibit is required.
  - Submit as a separate pdf document.
- Illinois Tollway Standard Business Terms and Conditions
  - Required - Submit as a separate pdf document.
- SOITEAM Data
  - Required, see Section 3.4.3 Instructions for Submitting the SOITEAM Data

**3.3.2.2 PREQUALIFIED FIRMS MAY INDICATE THEIR DESIRE TO BE CONSIDERED FOR SELECTION ON ANY OF THE PROJECTS LISTED WITHIN THIS PSB BY SUBMITTING A SEPARATE SOI FOR EACH PROJECT.**

**3.3.2.3 EACH SOI MUST BE SUBMITTED USING THE FOLLOWING BASIC FORMAT:**

COVER SHEET

Include Full Legal Firm Name, PSB Number, Item Number, and **all** known Subconsultants (Full Legal Firm Names).

Section 1. Executive Summary (limit of 5 pages)

- A. Legal Name of firm, address, telephone number, e-mail address and contact person.
- B. List all known Subconsultants, the work the firm(s) will be performing and a contact person for each. Identify any DBEs (Reference Section 2.5 for definitions) and VOSBs. Include Mentor and Protégé data if applicable.
- C. Name of Project Manager.
- D. Name of Project Engineer/Resident Engineer.
- E. Project Understanding.
- F. Project Approach (include brief statement of firm’s unique qualifications and experience, approach to the project’s specific challenges such as maintenance of traffic, environmental constraints, budget constraints, schedule constraints, design challenges, etc.).
- G. Statement that firm will meet or exceed the DBE goal and VOSB goal as applicable for the item. Include the proposed percentage of work to be completed by proposed DBE and VOSB firms (Percentages shall match those submitted with the SOITEAM data). For each proposed DBE firm, include a current certification letter that shows that the DBE/VOSB firm is certified in its scope(s) of work stated in the SOI and its LOI. (IDOT Prequalification in the respective scope will meet this requirement.)

Section 2. Organization Chart

Include names and titles for all Key Project Personnel.

Section 3. Relevant Project Experience

Include a minimum of three (3) relevant projects of equal or greater complexity accomplished within the past five (5) years, demonstrating the firm’s experience in the type of work required for this project. Color graphics and photographs may be sent with the files.

Include performance ratings for past work done for the Illinois Tollway, IDOT, or any other government agencies or public bodies, if applicable.

Section 4. Conflicts of Interest

Statement acknowledging any known or potential conflicts of interest the Prime Consultant may have.



## **NOTICE**

Pursuant to Illinois Department of Transportation (IDOT) Prequalification rules and procedures, the Illinois Tollway will accept your firm's prequalification the same as IDOT, in that your firm is prequalified until (Fiscal Year + 1 year). As per IDOT, your firm will be given an additional six months from this date to submit the applicable portions of the "Statement of Experience and Financial Condition" (SEFC) to IDOT to remain prequalified.

The firm remains prequalified during this six (6) month grace period. Once the data is submitted to IDOT, either before or on the due date, the firm remains prequalified in the current categories until IDOT reviews a category and decides. If there is not a submittal by the due date, the firm is automatically listed as not approved.

IDOT provides a listing of prequalified consulting firms on the website:

<http://www.idot.illinois.gov/doing-business/procurements/engineering-architectural-professional-services/index>

This list is typically updated weekly, and is based on the most recently approved SEFC application. Firms are encouraged to monitor their prequalification status in IDOT's EPAS system. This notice also applies when utilizing a Subconsultant to meet prequalification requirements on a project.

### **3.4 SUBMITTAL INSTRUCTIONS**

All submittals for this PSB will be received through the Illinois Tollway's e-Builder PSB SOI process at: <https://app.e-builder.net/>. Contact [ebuilder@getipass.com](mailto:ebuilder@getipass.com) for training and login information.

Firms that are teaming and preparing an SOI must use the code name assigned for the team. When a firm is submitting on behalf of a team, a unique e-Builder account and login ID are required. The team SOI submittal must be created and submitted by the Prime firm. (Important Reminder: if a Prime is submitting for themselves, that account and login ID will be different from the account and login ID that they will use to submit for a team).

The preparation of the SOI for submittal in e-Builder must be done in one e-Builder account, i.e., one account login ID. Each account/login has access only to the e-Builder PSB SOI process instance that is being created in that account. Each e-Builder PSB SOI process instance can only be seen from the login that created it.

One SOI is required for each PSB item. The subject line will be created in the eBuilder PSB SOI process when you select the item number your firm will be submitting for from the pull-down menu. Complete e-Builder instructions for the PSB SOI process can be found in the upper right-hand corner of the SOI instance.

This is not an invitation for bids. Firms properly prequalified for the projects listed herein may indicate their desire to be considered for selection by submitting an SOI to the Illinois Tollway via the e-Builder PSB 23-1 SOI process.

The Illinois Tollway follows the Qualifications Based Selection (QBS) process mandated by Illinois statute (30 ILCS 535/1 et seq.): Architectural, Engineering, and Land Surveying Qualifications Based Selection Act for selecting qualified Vendors under this PSB.

SOI e-Builder submittals must be received by the due date and time as noted in this solicitation. Any submittals received after that time will be considered late and the user will receive an e-Builder notification stating that the PSB SOI date and time has expired. Late submittals will not be accepted by the Illinois Tollway. NOTE: You must set the Time Zone field on your e-Builder account profile page to "(UTC-06:00) Central Time (US & Canada)" so that you can submit your SOIs up until the submittal deadline.

Please carefully read the instructions below **BEFORE** submitting your SOIs.

### 3.4.1 GENERAL INSTRUCTIONS

It is CRITICAL that submittal instructions be followed. All Forms must be submitted per the instructions provided. Failure to do so may result in an incomplete submittal resulting in your firm being disqualified. For further information on accessing the Illinois Tollway Website, PSB and Exhibits, please refer to the Table of Contents.

### 3.4.2 NAMING AND LABELING INSTRUCTIONS

- The Illinois Tollway requires electronic submittals for the Professional Services Bulletin's SOIs via the established e-Builder PSB process. All respondents must utilize a unique 2 to 6-character SOI Firm Name Code assigned by the Illinois Tollway.
- To determine the designated SOI Firm Name Code go to the Illinois Tollway's website under Doing Business>Construction and Engineering - see Vendor Resources and click on the link to the Professional Services Bulletin page. The current SOI Firm Name Code List will be posted under the "Required Forms" section. If your firm is not included on the list, or your firm name has changed, please contact PSB Coordinator. [csstaff@getipass.com](mailto:csstaff@getipass.com), for an assigned SOI Firm Name Code.
- When submitting "Team" files please, use the **new** SOI Firm Name Code assigned by the Illinois Tollway to the Team. The SOI Firm Code Name is exclusive to the electronic submittal – meaning it does not establish the name of the Team. Please contact PSB Coordinator, [csstaff@getipass.com](mailto:csstaff@getipass.com), for an assigned SOI Firm Name Code.

### 3.4.3 INSTRUCTIONS FOR SUBMITTING THE SOITEAM DATA

The SOITEAM information is now input into the "SOITEAM data" section in e-Builder. The following still apply to your submittal. Failure to provide the required information in the SOITEAM may result in the SOI being deemed non-responsive.

- Vendors are required to complete the SOITEAM data section for each Item, completing all columns shown for the Prime Vendor, and for every Subconsultant that is being proposed. ***Do not enter "TBD" or enter a range of percentages, and do not leave blank cells.*** Totals must equal 100%.

#### **TEAM submittals:**

- NOTE: If a firm is submitting as a Prime and also as a Team lead for one or more teams, a separate SOI and the SOITEAM data information must be submitted for each. DO NOT combine SOITEAM data information for unique SOI submittals.
- When entering prime Vendor or Subconsultant information in the SOITEAM data section, please follow the below instructions:
  - Add new item for firm information for each team member
  - Under Team Member Role, select Prime (Lead Teaming Partner) or Prime (Non-Lead Teaming Partner)
  - Teams with three firms may enter an additional firm and select Prime (Non-Lead Teaming Partner)
  - Select Subconsultant for the Firm Role for any additional firms that are included in the SOI.
  - Below is a sample of how the Team members and Subconsultants are to be entered and submitted within the SOITEAM data section:

### 3.4.4 INSTRUCTIONS FOR e-Builder SUBMITTAL

It is important that your e-Builder submittal be prepared according to the following instructions:

**A Statement of Interest file and required exhibit files must be attached to each SOI submission in e-Builder. Files must a) be attached to the SOI process instance and b) be saved in the document folder corresponding to the item number. If a file will be used for more than one submission, a separate, unique file must be saved in the document folder for each item. Do not attach a file already saved in one item folder to an SOI submission for a different item.**

The Word and/or PDF documents available (except for SOIs) on the Illinois Tollway website are labeled as follows:

FORM	FILE NAMING CONVENTION - EXAMPLE -	DIRECTIONS
<p><b>SOI – Statement of Interest</b></p> <p>Includes cover sheet, executive summary, organizational chart and relevant project experience</p> <p>For each Item submittal, use firm's 2-6-character SOI Firm Name Code (this example = ABC immediately followed by underscore SOI plus a 2-digit Item Number (i.e., SOI01 through SOI 99). See Section 3.3.2.3 SOI format Instructions.</p>	<p>ABC_SOI01.pdf</p>	<p>Submit as a separate document on e-Builder</p>

<p><b>Teaming Agreement</b> SOI use the team's unique 2-6-character SOI Team Name Code</p>	<p>ABCXYZ_SOI01_TM.pdf</p>	<p>Submit as a separate document on e-Builder</p>
<p><b>Illinois Tollway Standard Business Terms and Conditions</b></p> <p><b>Teaming Agreement</b> <b>Illinois Tollway Standard Business Terms and Conditions.</b></p>	<p>ABC_TC.pdf</p> <p>ABC_TC_TM.pdf DEF_TC_TM.pdf GHI_TC_TM.pdf</p>	<p>Submit as a separate document on e-Builder</p> <p>Submit as a separate document on e-Builder for <b>each Team member</b></p>
<p><b>Illinois Board of Elections Registration document</b></p> <p><b>Teaming Agreement</b> <b>Illinois Board of Elections Registration document</b></p>	<p>ABC_BOE.pdf</p> <p>ABC_BOE_TM.pdf DEF_BOE_TM.pdf GHI_iBOE_TM.pdf</p>	<p>Submit as a separate document on e-Builder</p> <p>Submit as a separate document on e-Builder for <b>each Team member</b></p>
<p><b>Vendor Disclosure (formerly Forms A) or IPG Active Registered Vendor Disclosure (formerly Forms B) (Disclosures) – are required.</b> To submit use your 2-6-character SOI Firm Name Code followed by DS.</p> <p><b>Teaming Agreement</b> <b>Vendor Disclosures (formerly Forms A) or IPG Active Registration Vendor Disclosures (formerly Forms B) (Disclosures) – are required.</b> Use the unique 2-6-character SOI Firm Name Code for EACH individual Team firm name followed by _DS_TM</p>	<p>ABC_DS.pdf</p> <p>ABC_DS_TM.pdf DEF_DS_TM.pdf GHI_DS_TM.pdf</p>	<p>Submit as a separate document on e-Builder</p> <p>Submit as a separate document on e-Builder for <b>each Team member</b></p>
<p><b>Exhibit A</b> – Proposed Staff – Key Project Personnel.</p> <p>a. Include resumes for Key Project Personnel proposed for the project (Prime firm and Subconsultants for those specific positions identified in the PSB item description). Resumes for each individual should not exceed two (2) pages and should include only relevant experience for the specific Item.</p> <p>b. List the Key Project Personnel to match the required prequalification categories and any additional personnel requirements designated in the Bulletin Items. (Include firm name if work is to be completed by a Subconsultant).</p> <p>c. QC/QA personnel must be different individuals than staff preparing the documents.</p> <p>Construction Management Services require the names and resumes of Certified Record Documentation Reviewers and Inspectors that will be</p>	<p>ABC_ExA.pdf</p>	<p>Submit as a separate document on e-Builder</p>

assigned to the project. Specific requirements are explained in the Phase III Items.		
<p><b>Exhibit C</b> - Current Obligations, use your 2-6-character SOI Firm Name Code, followed by _WL</p> <p>One copy of the Current Obligations Form is required to be completed by the Prime Firm. <b>Teaming Agreement</b></p> <p><b>Exhibit C</b> - use the unique 2-6-character SOI Team Name Code followed by _WL_TM</p>	<p>ABCWL.pdf</p> <p>ABCXYZ_WL_TM.pdf</p>	<p>Submit as a separate document on e-Builder</p> <p>Submit as a separate document on e-Builder. The document should include one form for each Team member.</p>
<p><b>Exhibit D</b> – Availability of Key Project Personnel</p> <p>Firms must show the percentage of time identified Key Project Personnel will be available to work on the project described in each Item. We request a Word document saved in .pdf format to be completed with the relevant information.</p>	ABC_ExD.pdf	Submit as a separate document on e-Builder
<p><b>Exhibit E</b> – DBE/VOSB: Partnering for Growth Program - If proposing a mentor-protégé arrangement with a DBE or VOSB firm attach the required <u>Exhibit E</u>.</p>	ABC_ExE_P4G.pdf	Submit as a separate document on e-Builder
<p><b>Exhibit E</b> – Reverse DBE/VOSB: Partnering for Growth Program - If proposing a mentor-protégé arrangement with the <b>subconsultant mentoring</b> attach the required <u>Exhibit E</u>.</p>	ABC_ExE_RevP4G.pdf	Submit as a separate document on e-Builder
<p><b>Exhibit F</b> - Veteran Small Business Participation, Utilization Plan and Letter of Intent</p>	ABC_ExF.pdf	Submit as a separate document on e-Builder
<p><b>Exhibit H</b> - DBE Participation, Utilization Plan and Letter of Intent</p>	ABC_ExH_DBE.pdf	Submit as a separate document on e-Builder
<p><b>Firm's Commitment and Signature Form.</b></p>	ABC_FCS.pdf	Submit as a separate document on e-Builder
<p><b>DBE and VOSB Evidence (current certification letters)</b></p>	DBE_VOSB_Certs.pdf	Submit as a separate document on e-Builder

- Complete the Word documents and then convert them to Adobe.pdf for the submittal.
- Do not send zipped files. They will be rejected and cause the firm's submittal to be disqualified.
- Signatures must be scanned, then cut/copied and pasted into the appropriate signature blocks. The files must then be converted to a PDF.
- The time zone in your e-Builder profile must be set to "(UTC-06:00) Central Time (US & Canada)." The

Time Zone field can be found on the Setup tab under Personal Information>My Profile. See the latest version of the SOI User Manual for instructions, available at the e-Builder PSB SOI user manual, FAQ file, and training videos link in Section 3.7 Useful Links.

### 3.4.5 COMMON MISTAKES

The following is a list of common mistakes found when submitting a Professional Services SOI. This list is not intended to be exhaustive and Vendors should make every attempt to avoid these common mistakes in their submittals or the submittal may be deemed non-responsive and may not be scored.

- General
  - Failure of minimum 40% self-performance by the prime
  - Inconsistent percentages throughout SOI submittals
  - Incorrect PSB #
  - Incorrect Contract #
  - Changing anonymous e-Builder PSB account profile entries
  - Submitting too close to the deadline
  - Failure to save attached document in the correct item folder for that submission.
  - Failure to provide the required DBE/VOSB participation/utilization information in the SOITEAM may result in the SOI being deemed non-responsive.
- SOITEAM Data
  - Leaving blank spaces
  - Percentage does not equal 100% – this percentage should include the prime and subs
  - Failure to include all Firms from the SOI (Prime, Team, Subconsultants etc.)
- Exhibits
  - Failure to submit Exhibit E when proposing P4G plan in the SOITEAM data
  - Unnecessarily submitting Exhibit E when not proposing P4G in SOITEAM data
  - Failure to submit correct version of Vendor Disclosures (formerly Forms A) or IPG Active Registration Vendor Disclosures (formerly Forms B)
  - Failure to list all required Key Personnel on Exhibit A
  - Change of the title of Key Personnel on Exhibit A
  - Failure to list % on Terms and Conditions FEIN page
  - Percentages different than SOITEAM Grid Data
- Teams
  - Failure to include all Team members on Exhibit C (Workload)
  - Failure to include Terms and Conditions for all Team members
  - Failure to include Vendor Disclosures (formerly Forms A) or IPG Active Registration Vendor Disclosures (formerly Forms B) for all Team members

## 3.5 DISCLOSURES AND CERTIFICATIONS

### 3.5.1 INSTRUCTIONS FOR SUBMITTING DISCLOSURES

The submittal shall contain either Vendor Disclosures (formerly Forms A) or IPG Active Registration Vendor Disclosures (formerly Forms B). SOIs submitted without Vendor Disclosures (formerly Forms A) or IPG Active Registration Vendor Disclosures (formerly Forms B) shall be deemed non-responsive. Vendor Disclosures (formerly Forms A) section shall be returned by Firm(s) that are not registered in the Illinois Procurement Gateway (IPG). Enter the BidBuy number on either Vendor Disclosures (formerly Forms A) or IPG Active Registration Vendor Disclosures (formerly Forms B) when asked to supply an IPB Reference #.

IPG Active Registration Vendor Disclosures (formerly Forms B) shall be returned by Firm(s) that have a current, approved IPG registration.

#### ***Vendor Disclosures (formerly Forms A) Section***

Complete this section if you **are not using** a current, approved Illinois Procurement Gateway (IPG) Registration number.

<https://www.illinoistollway.com/doing-business/construction-engineering/forms>

1. Business and Directory Information
2. Illinois Department of Human Rights Public Contracts Number
3. Authorized to Do Business in Illinois
4. Standard Certifications
5. State Board of Elections
6. Disclosure of Business Operations in Iran
7. Financial Disclosures and Conflicts of Interest
8. Taxpayer Identification Number
9. Signature

#### ***IPG Active Registration Vendor Disclosures (formerly Forms B) Section***

Complete this section only if you are **using** a current, approved IPG Registration number.

<https://www.illinoistollway.com/doing-business/construction-engineering/forms>

1. Certification of Illinois Procurement Gateway Registration #
2. Certification Timely to this Solicitation
3. Disclosures of Lobbyist or Agent
4. Disclosure of Current and Pending Contracts
5. Signature

### 3.5.2 INSTRUCTIONS FOR SUBMITTING ILLINOIS TOLLWAY STANDARD BUSINESS TERMS AND CONDITIONS

Submit the Illinois Tollway Standard Business Terms and Conditions. This document is also available on the Illinois Tollway website and submit as a separate document on e-Builder. Team leads must submit Illinois Tollway Standard Business Terms and Conditions for themselves and team members.

### **3.6 PROTEST PROCEDURE**

Vendors may submit a written protest to the Protest Review Office following the requirements of the IDOT Standard Procurement Rules 44 ILL ADM 6.390 through 6.440. All protests shall be in writing and filed with the CPO within seven (7) calendar days after the protester knows or should have known of the facts giving rise to the protest. Protests filed after the seven (7) calendar day period will not be considered. In addition, protests that raise issues of fraud, corruption or illegal acts affecting specifications, special provisions, supplemental specifications and plans must be received by the CPO no later than fourteen (14) calendar days before the date set for opening of bids. The Protest Review Office information is as follows:

Chief Procurement Office  
Attn: Protest Review Office  
401 S. Spring Street  
Suite 515 Stratton Office Building  
Springfield, IL 62706  
Email: [eec.legalstaff@illinois.gov](mailto:eec.legalstaff@illinois.gov)  
Facsimile: (217) 558-1399  
Illinois Relay: (800) 526-0844



### 3.7 USEFUL LINKS

The Illinois Tollway website – <https://www.illinoistollway.com/>

Professional Service Bulletin - <https://www.illinoistollway.com/doing-business/construction-engineering/bids-bulletins-awards>

Vendor Contract Forms (required forms for submittal) - <https://www.illinoistollway.com/doing-business/construction-engineering/forms>

Vendor Invoicing Forms - <https://www.illinoistollway.com/doing-business/construction-engineering/forms>

Partnering for Growth Program - <https://www.illinoistollway.com/doing-business/diversity-development/programs/partnering-for-growth>

e-Builder website: <https://app.e-builder.net/>

e-Builder PSB SOI user manual, FAQ file, and training videos:  
<https://app.e-builder.net/public/PublicFolderView.aspx?FolderID=%7bdc0355ee-4323-458e-91b5-547c6655b5f5%7d>

e-Builder PSB SOI training webinar dates and registration information:  
<http://www.onlineregistrationcenter.com/registerlist.asp?m=176&p=134&group=57&tid=222>

Bid Buy - <https://www2.illinois.gov/cpo/general/Pages/BidBuy/BidBuy.aspx>

Chief Procurement Office/Illinois Procurement Gateway (IPG) – Vendor Registration -  
<https://ipg.vendorreg.com/>

State Board of Elections - <https://www.elections.il.gov/#News>

Illinois Department of Central Management Services – Travel Reimbursement Schedule -  
<https://www2.illinois.gov/cms/employees/travel/pages/default.aspx>

National Institute of Standards and Technology - <http://www.nist.gov/>

Illinois Department of Transportation - <http://www.idot.illinois.gov/>

City of Chicago Certification of Compliance -  
<https://chicago.mwdbe.com/FrontEnd/VendorSearchPublic.asp?TN=Chicago>

Illinois Department of Transportation Manual of Test Procedures for Materials -  
<https://idot.illinois.gov/Assets/uploads/files/Doing-Business/Manuals-Guides-&-Handbooks/Highways/Materials/Concrete/6-08%20minimumprivatelabrequirements.pdf>

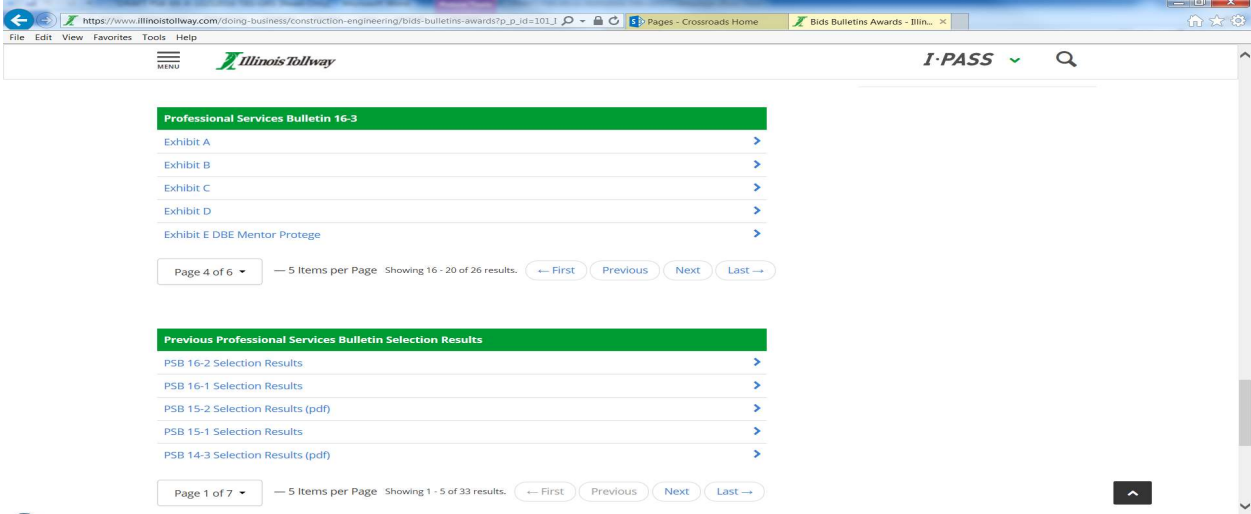
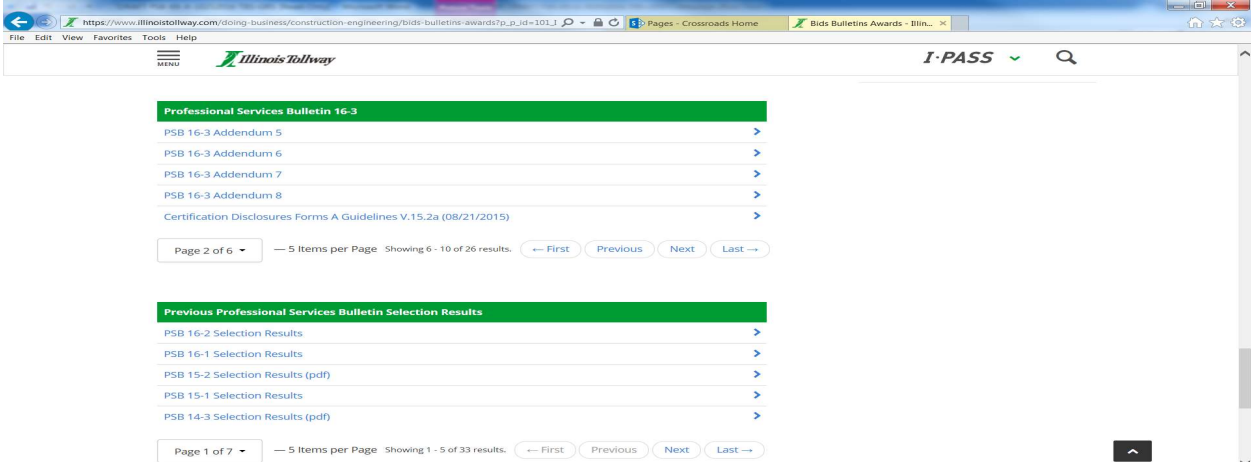
### 3.8 ILLINOIS ePROCUREMENT BidBuy NOTICE

To register in the Illinois eProcurement System, please follow these instructions:

- Go to <https://www.bidbuy.illinois.gov/bs/>
- Please direct questions regarding the registration process or the use of BidBuy to email address: [stateuser.bidbuy@illinois.gov](mailto:stateuser.bidbuy@illinois.gov) or the Procurement Help desk at 217-557-8992.

### 3.9 INFORMATION ON ACCESSING ILLINOIS TOLLWAY WEBSITE

- Go to [www.illinoistollway.com](http://www.illinoistollway.com)
- Click on “Menu”
- Click “Doing Business”
- Click “Construction and Engineering”
- Middle of page, under “How Can We Help You? / Vendor Resources” click “Professional Services Bulletin”
- \*Helpful Hint: A limited number of items are shown under “Professional Services Bulletin” on each page; click “Next” to view additional items.



### 3.10 FUTURE PROFESSIONAL SERVICES BULLETIN NOTIFICATIONS

To receive notification from the Illinois Tollway that a Professional Services Bulletin has been posted, please submit the following information:

***PLEASE DO NOT SUBMIT WITH YOUR SOI***

**If previously submitted, only resubmit if information has changed.  
To unsubscribe from the PSB Notification list contact:**

Catrice Hardwick-Giles at 630-241-6800 extension 4653

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**Include the following information:**

Please add this contact to receive notification from the Illinois Tollway that a Professional Services Bulletin has been posted:

Name of firm \_\_\_\_\_

E-mail address \_\_\_\_\_

Contact person (corresponding with e-mail) \_\_\_\_\_

### 3.11 RESERVED

### **3.12 PSB 23-1 EXCHANGES WITH FIRMS AFTER SOI SUBMISSION**

**Discussions may be held with Firms to clarify certain aspects of their SOIs.**

- Discussions are limited exchanges between the Tollway and Firms that may occur during the responsiveness determination. For purpose of this PSB, such discussions shall be exchanged only between the Firm and the Designated Procurement Contact for this PSB.
- Please use the e-mail address: **csstaff@getipass.com**
- These exchanges shall not provide an opportunity for the Firm to revise its SOI, but may only address:
  - Deficiencies
  - Errors
  - Omissions
- Responses are due to the Illinois Tollway on the due date established by the Illinois Tollway. Discussions may be initiated by the Illinois Tollway after that time. Firm's responses that are not received timely shall result in the SOI being considered non-responsive.

**Certain requirements are not open for discussion and, if not met, shall render the SOI non-responsive:**

- Late submissions, including omission of any of the two (2) required documents as stated in the PSB:
  - SOI
  - Disclosures (DS)- Vendor Disclosures (formerly Forms A) or IPG Active Registration Vendor Disclosures (formerly Forms B)
- Omission of State of Illinois requirements
- Inability to meet eligibility requirements as stated in 44 Ill. Admin. Code 625.70, Confirmation of Eligibility.