

# PROFESSIONAL SERVICES BULLETIN 17-4

## ADDENDUM 3

*ADDENDUM 3 does not change the due date or time.*

STATEMENTS OF INTEREST are due by 4:30:00 p.m.

(Central Standard Time)

**Due Date: August 22, 2017**

Successful Offerors will be notified.

Overall results will be posted on the Illinois  
Procurement Bulletin.

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No. 17-4 Addendum 3

August 14, 2017

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



Illinois Tollway  
2700 Ogden Avenue, Downers Grove, IL 60515

**ADDENDUM NO 3  
TO  
PROFESSIONAL SERVICES BULLETIN No 17-4**

**August 14, 2017**

Addendum No 3 does not change the due date or time. Statements of Interest are due via email (SOIPSB.17-4@getipass.com), to the Illinois State Toll Highway Authority, by 4:30:00 p.m. Central Time, August 22, 2017.

**NOTES:**

The following questions were received in the SOIPSB Questions folder and are addressed below. Resulting changes are summarized below:

- Deleted GIS Support, Item 1- see attached page 4R
- Removed PE for Project Manager, Item 1 - see attached 6R
- Removed PE for Construction Corridor Manager, Item 2- see attached 9R, Exhibit A and 82R
- SOI Teamworksheet – Item 2 drop down boxes fixed

**QUESTIONS:** The Tollway has received the following questions to PSB 17-4 via email to the SOIPSB 17-4 mail box. The Tollway offers the following responses:

**Question 1:** Can you confirm that the GIS Support services listed on page 4 are actually a requirement of this PSB? We understand that a similar requirement was in a PSB from many years back, before the Tollway had a GIS Group and a GIS Manager, and wonder why the same requirement is in this PSB (possibly a copy/paste error)?

**Response:** GIS support is removed from the PSB 17-4 Item 1, see page 4R attached.

**Question 2:** For item 2 in the Key Personnel section - the Construction Corridor Manager must be an Illinois Licensed Professional Engineer. Would it be acceptable to propose an individual who has previously served as the Corridor Manager on several Illinois Tollway projects, but is not an IL PE?

**Response:** Yes.

**Question 3:** On Page 7, under “Other,” reference is made to final documents being provided in hard copy and electronic format. We assume this refers to scope of work deliverables and not the Statement of Interest. Please clarify if the Tollway requires a hard copy submittal of the SOI.

**Response:** All Statements of Interest are to be submitted through the email system, please reference PSB 17-4, 4.4 Submittal Instructions. The Tollway does not require submittal of a hard copy of the Statements of Interest.

**Question 4:** Under Section 4.1.1.6.3, Relevant Project Experience, the third bullet appears to be out of place in referencing “the person who will assume the duties of Project Manager (must be an Illinois Licensed Professional Engineer).” In past PSBs this bullet has read “Project Manager(s) and Key Staff.” Please clarify the information the Tollway requires in the Relevant Project Experience section regarding PMs and Key Staff.

**Response:** Under 4.1.1.6.3, the Tollway will delete the requirement for the Program Manager to be a Illinois Licensed Professional Engineer.

**Question 5:** On Page 27, Exhibit A – Proposed Staff, the form is pre-populated with specific positions identified in each PSB Item, including a page for personnel meeting a Required Prequalification Category. If submitting on Item 1, where there are no prequalification categories, could additional personnel be included in the slots on page 2 of Exhibit A?

**Response:** Exhibit A is utilized to identify Key Personnel, positions identified in the PSB Item Detail. Personnel named in Exhibit A must also be listed on Exhibit D: Availability of Key Project Personnel

**Question 6:** The drop downs on the Item 2 Tab on the SOITEAM Spreadsheet do not work. Please advise as to how we should proceed.

**Response:** The drop downs for item 2 on the SOI Team worksheet is fixed. Please use the current worksheet on the Tollway's website.

**Question 7:** Considering that these roles are important to the continued success of the Tollway program and that the CCM/OR did not appear on previous PSB Look Ahead Schedules, is it possible to allow for additional time until the due date? Having these projects together has affected teaming plans and opportunities. Additional time will allow consultants to put forth teams allowing for the strongest competition benefitting the Tollway.

**Response:** Thank you for your comment; however, the due date is August 22, 2017 as indicated above.

**END OF QUESTIONS**

#### 1.4.1.4 Schedule

This project is scheduled to start in November 2017.

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 at the Tollway Central Administration office building in Downers Grove.

#### 1.4.1.5 Scope of Consultant Services

PMO services shall be coordinated with existing Tollway staff and with the Traffic Engineering and Consulting Engineering consultants and may include the following tasks:

##### 1.4.1.5.1 Program Management Services:

- Overall Program Management. Manage the implementation of the Tollway's current Move Illinois program and potentially any subsequently-approved capital programs. Overall program management responsibilities may include but are not limited to a review of the current systems in place for project cost/budget controls, and schedule controls and recommendations for any changes based on this review.
- Comprehensive Program Controls, including cost controls, cost estimating, and master program scheduling to monitor the overall program and individual project budget, expenditures and schedule. This task could also be considered as a Technical/ Administrative Service task and may include a review of current methods and implementing changes deemed necessary based upon recent recommendations.
- Design & Construction Management. Project managers to supplement existing Tollway staff in the day to day management of design and construction contracts.
- Program Development. Assist in the on-going program budget development and development of future programs.
- Errors and Omissions Review. Assist the Tollway in evaluating potential errors and omissions on design, construction management and construction contracts.
- Contract Claims review: Assist the Tollway in evaluating construction claims.

##### 1.4.1.5.2 Technical/Administrative Services:

These services are defined as positions that report to Tollway personnel to fill specific needs of the Tollway. These services include, but are not limited to:

- Intergovernmental agreement development, coordination, processing and tracking of payments.
- Diversity Program Management. Responsible for the development, implementation, management, reporting, monitoring, enforcement and coordination of the Tollway's Diversity Program which includes the Disadvantaged Business Enterprise (DBE) and Equal Employment Opportunity (EEO) Program. Diversity management may also include assisting in creating policies, procedures and overseeing a comprehensive communication and outreach program.
- Fiber optic and utility coordination. Task may include providing administration and coordination for the maintenance, relocation and repair of the Tollway's fiber optic system in addition to coordinating the relocation of other utilities located on the Tollway's property.
- Information Technologies System Deployment. Assist with the planning, design, deployment, operation, and maintenance of all intelligent transportation systems projects and initiatives on the Tollway, excluding electronic tolling. Tasks may include day-to-day management of the

#### 1.4.1.6.2 Method for Providing PMO Services

The Consultant shall propose their method for providing Program Management services; however, in general, the Tollway is interested in how the Consultant will address the following:

1. Staffing: This includes incorporating the Consultant's team within the Tollway employees.
2. Program Controls: This includes cost estimating, scheduling, forecasting, budget analysis, and financial assistance necessary for either the Consultant or the Tollway to provide the management of the Tollway's Move Illinois program.
3. Design Management: The capability of monitoring design contracts with respect to schedule, scope, and budget for the Tollway's Move Illinois program.
4. Construction Management: The capability of monitoring construction and construction management contracts with respect to schedule, scope, and budget for the Tollway's Move Illinois Program.
5. Document Controls: This includes the management of Tollway documents, from both internal and external sources, as required for either the Consultant or the Tollway to provide the management of the capital programs.
6. Cost Estimating Services: The capability of providing cost estimating services, specifically addressing the consultant's process for producing accurate cost estimates and the specific methods used in developing the cost estimates.
7. Technical Expertise: The capability of providing technical support for Information Technology and Business Systems.
8. Financial Cost Savings: The capability of initiating measures to implement and identify areas of cost savings for the Tollway. Respondents should include examples of cost savings measures and innovations.

#### 1.4.1.6.3. Relevant Project Experience PMO Services

Include a minimum of three (3) **relevant** projects accomplished within the past 10 years, demonstrating the firm's experience in the type of work required for this project. The use of photos is highly discouraged.

**Include the following for each project identified in the categories below:**

- Project name
- Project location
- The person who will assume the duties of the Program Manager
- A brief description of the project and the work performed, including the project's size, complexity, and fee
- Name, address, telephone number, and e-mail address of client contact to serve as reference

#### Tollway Projects

Include additional projects that specifically identify and describe the firm's experience related to Tollway projects, including the Illinois Tollway or any other Tollways in the United States. The Offeror should also provide the **total** firm's billings for the past 10 years in performing typical PMO services on Tollway projects, and briefly identify those projects.

#### Other Transportation Projects

The Offeror should summarize any relevant experience working with transportation agencies and other governmental bodies operating in this region and/or with which the Tollway regularly works or interacts, including the Illinois Department of Transportation (IDOT), the Federal Highway Administration (FHWA), the Environmental Protection Agency, and the United States Army Corps of Engineers.

#### Project Management and Coordination Experience

The Offeror must describe its experience in providing project management and coordination services similar to the services required and described above. This description should specifically address the

- The firm will perform Construction Corridor Management and Owner's (Tollway) Representative (CCM) services for the Phase III Engineering services for future Construction Management contracts for work on the Central Tri-State Corridor project. The firm shall coordinate with the Tri-State Corridor Design Corridor Manager (DCM). These services will consist of but not be limited to constructability reviews, industry coordination, review of packaging and timing of construction contracts, coordination with Construction Managers (CMs), monitor and coordinate if requested by the Chief Engineering Officer or Chief Operating Officer progress with respect to utilities, utility relocation, permits and land acquisitions as they impact planned construction activities, etc.
- The firm will act as the Owner's (Tollway) Representative beginning with Phase I design and through the construction and completion of the project. The Consultant may also be required to perform yet to be determined construction management (CM) elements for the corridor. The project manager or designee should report monthly to the Chief Engineering Officer and Chief Operating Officer regarding project status and problems and short and long term scheduling of the project and any other projects or matters the Chief Engineering Officer and Chief Operating Officer may require from the firm to move this project forward in a timely, safe and financially responsible manner.
- The Consultant will perform on-site inspection, review layout of contract including design changes, provide geotechnical inspection and testing, prepare records, maintain documentation, submit pay estimates and change orders and any other duties requiring the services of an engineer to complete this project on a timely basis and in accordance with Tollway specifications. The Consultant must complete and submit final measurements, calculations and final contract documents to the Tollway no later than six (6) weeks after completion of Punch List for the project. The Consultant must have MicroStation capabilities. All final documents shall be submitted in hard copy and electronic format and follow the ICAPP Manual. All CADD file documents shall be required to contain all record drawing modifications.

#### 1.4.2.5 Guidelines for Submitting Statement of Interest:

In addition to Section 4.3 GUIDELINES FOR SUBMITTING STATEMENTS OF INTEREST (SOI) REFERENCE SECTION of this PSB, all Statements of Interest shall include the following.

##### 1.4.2.5.1 Project Team Matrix and Staffing Plan

The Offeror shall submit a project team matrix that clearly illustrates the key personnel of the organizational structure proposed to accomplish the management, technical, and administrative services required. The Offeror shall identify the Key Personnel and the key technical staff of the team. The firm employing each of these key personnel must be identified.

##### Key Personnel

The Offeror shall identify and provide relevant information concerning the Offeror's other project management and key technical personnel. These individuals can be the employees of any firm on the team. Key personnel must include, but not be limited to:

- A. Project Manager  
*Must be an Illinois Licensed Professional Engineer*
- B. Construction Corridor Manager
- C. Resident Engineer
- D. Materials Coordinator  
*The person actively performing the documentation on the project must possess a current IDOT Construction Document certificate. **Include the Documentation Certificate Number for IDOT class S-14, Documentation of Contract Quantities.***
- E. Document Technician
- F. Materials QA Technician

## Exhibit A – Proposed Staff PSB 17-4

Please provide the information for the following Key Project Personnel, (Key Project Personnel are defined as those specific positions identified in each PSB Item, and are subject to approval by the Tollway if they change during contract performance), including the staff from the Sub Consultants. **The personnel named in Exhibit A must also be listed on Exhibit D: Availability of Key Project Personnel**

Project Manager (Item 1)**			
Name:			
Firm:			
Category:			
License #:			
Year Registered:		State:	
Office Address:			
City:		State:	

Program Controls Manager (Item 1)**			
Name:			
Firm:			
Category:			
License #:			
Year Registered:		State:	
Office Address:			
City:		State:	

Design Monitor (Item 1)**			
Name:			
Firm:			
Category:	IL Licensed Professional Engineer		
License #:			
Year Registered:		State:	
Office Address:			
City:		State:	

Construction Monitor (Item 1) **			
Name:			
Firm:			
Category:	IL Licensed Professional Engineer		
License #:			
Year Registered:		State:	
Office Address:			
City:		State:	

Project Manager (Item 2)**			
Name:			
Firm:			
Category:	IL Licensed Professional Engineer		
License #:			
Year Registered:		State:	
Office Address:			
City:		State:	

Construction Corridor Manager (Item 2)**			
Name:			
Firm:			
Category:			
License #:			
Year Registered:		State:	
Office Address:			
City:		State:	

Resident Engineer (Item 2)**			
Name:			
Firm:			
Category:			
License #:			
Year Registered:		State:	
Office Address:			
City:		State:	

Materials Coordinator (Item 2)**			
Name:			
Firm:			
Category:	Documentation Certification Number- IDOT class S-14		
License #:			
Year Registered:		State:	
Office Address:			
City:		State:	

Document Technician (Item 2)**			
Name:			
Firm:			
Category:			
License #:			
Year Registered:		State:	
Office Address:			
City:		State:	

Materials QA Technician (Item 2)**			
Name:			
Firm:			
Category:			
License #:			
Year Registered:		State:	
Office Address:			
City:		State:	

<p>PART I, Professional Services Bulletin No. 17-4 Item Detail, Item 2, 1.4.2.5.1 - Project Team Matrix and Staffing Plan</p>	<p>In addition to Section 4.3 GUIDELINES FOR SUBMITTING STATEMENTS OF INTEREST (SOI) REFERENCE SECTION of this PSB, all Statements of Interest shall include the following.</p> <p>The Offeror shall submit a project team matrix that clearly illustrates the key personnel of the organizational structure proposed to accomplish the management, technical, and administrative services required. The Offeror shall identify the Key Personnel and the key technical staff of the team. The firm employing each of these key personnel must be identified.</p> <p><u>Key Personnel</u></p> <p>The Offeror shall identify and provide relevant information concerning the Offeror's other project management and key technical personnel. These individuals can be the employees of any firm on the team. Key personnel must include, but not be limited to:</p> <ul style="list-style-type: none"> <li>A. Project Manager <i>Must be an Illinois Licensed Professional Engineer</i></li> <li>B. Construction Corridor Manager</li> <li>C. Resident Engineer</li> <li>D. Materials Coordinator <i>The person actively performing the documentation on the project must possess a current IDOT Construction Document certificate. <b>Include the Documentation Certificate Number for IDOT class S-14, Documentation of Contract Quantities.</b></i></li> <li>E. Document Technician</li> <li>F. Materials QA Technician</li> </ul>
<p><b>Applicable to Teaming Agreements</b></p>	
<p>PART II, 2.8 Teaming Agreement</p>	<p>Team offers shall comply with the same requirements set forth for individual offers, including but not limited to the submittal (under the Team's SOI code name) of the Statement of Interest, SOI Team Spreadsheet, Exhibits, and Disclosures.</p> <p>Team members must clearly be identified with the Statement of Interest submittal, and Team Lead shall be considered the Prime Consultant upon selection.</p> <p>The Tollway requires the Team to 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 subcontractors must be clearly defined and leave no room for interpretation in the Statement of Interest.</p> <p><b>Note:</b> When entering data into the SOITEAM.xls spreadsheet the following must be followed:</p> <ul style="list-style-type: none"> <li>• <i>Remove / delete the spreadsheet tabs for those items which your Team is not submitting.</i></li> <li>• <i>Submit one (1) SOITEAM.xls spreadsheet per Team (i.e. if you enter into more than one Team (different participants) you will need to submit a separate SOITEAM.xls spreadsheet for each. <b>Note:</b> not for each item but for each separate, unique Team).</i></li> <li>• <i>When saving the SOITEAM.xls spreadsheet for submittal to the Tollway place the cursor in cell B3.</i></li> <li>• <i>Do not change formatting.</i></li> <li>• <i>Do not change tab colors.</i></li> <li>• <i>Do NOT cut and paste information.</i></li> <li>• <i>When entering Yes or No responses, responses are to be Yes or No not Y or N</i></li> <li>• <i>Ensure you enter the SOI information under the tab / item number for your</i></li> </ul>