

# PROFESSIONAL SERVICES BULLETIN 22-3

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

**Due Date: September 27, 2022**

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. 22-3

September 6, 2022

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



Illinois Tollway  
2700 Ogden Avenue, Downers Grove, IL 60515

PSB 22-3

September 6, 2022

## **NEW TO THIS PSB**

- Updated language and requirements regarding Conflicts of Interest
  - Section 2.1 CONSULTANT/SUBCONSULTANT CONFLICTS OF INTEREST WITHIN TOLLWAY PROJECTS
  - Section 3.3 GUIDELINES FOR SUBMITTING STATEMENTS OF INTEREST (SOI)
- Revised requirements of Section 3.4.3 INSTRUCTIONS FOR SUBMITTING THE SOITEAM DATA
- New instructions included for Exhibit G-Contract Participation

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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 22-3 Coordinator: [csstaff@getipass.com](mailto:csstaff@getipass.com)

PSB 22-3 Tech Support: [ebuilder@getipass.com](mailto:ebuilder@getipass.com)

PSB 22-3 eBuilder Training: [ebuilder@getipass.com](mailto:ebuilder@getipass.com)

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## 1.2 22-3 OFFICIAL NOTICE

This Professional Services Bulletin 22-3 (PSB 22-3) 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 22-3, 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 22-3 SUMMARY

Information for the e-Builder process for PSB 22-3 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)

All questions related to this PSB must be submitted electronically through the e-Builder SOI Mailbox at [PSB 22-3.01 Questions and RFIs@docs.e-builder.net](mailto:PSB_22-3.01_Questions_and_RFIs@docs.e-builder.net) no later than **September 13, 2022 at 4:30:00 pm (CT)**. The subject line should read: PSB 22-3 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 22-3 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. 22-3 ITEM INDEX

No.	Project No. / County	Description	Page No.
1	RR-22-4862 Systemwide	<b>Systemwide, Construction Management Services Upon Request</b> On-call, and as-needed Construction Management Services.	A-1
2	RR-22-9269 Systemwide	<b>Program Management and Construction Management Services – Job Order Contracting (JOC)</b>	A-3
3	RR-22-4863 DuPage and Cook Counties	<b>IL 390, Pavement and Structural Preservation and Rehabilitation, Lake Street (M.P. 6.0) to I-290 (M.P. 13.0), Construction Management Services</b>	A-6
4	RR-22-4864 Systemwide	<b>Systemwide, Design Services Upon Request</b> On-call, and as-needed Phase II Engineering Services.	A-7

Details follow for each of the foregoing four (4) Project Numbers found in this PSB **22-3**.

## 1.5 PSB ITEM DETAILS

### 1.5.1 Item 1 RR-22-4862, Systemwide, Construction Management Services Upon Request

This project has a 37% D/M/WBE participation goal and 3% VOSB participation goal.

Phase III engineering services are required for the construction inspection and supervision at selected locations on the Tollway system. Task orders under the blanket agreement will be negotiated and authorized by the Tollway on an as-needed basis. Tasks will include construction management for projects identified by the Tollway, and may include, but not be limited to the following:

1. Des Plaines River Bridge repairs
2. Various structural repairs
3. On call and as-needed work related to the Tollway System.

The upper limit of compensation will be set at \$4,000,000 to be authorized for use as needed.

The Consultant will perform on-site inspection, review layout of contract work, provide geotechnical inspection and testing, prepare records, maintain documentation, submit pay estimates 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 may be required to review pre-final contract documents submitted to the Tollway. 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 punchlist work for the project.

The Prime Consultant must be prequalified by IDOT in the following category:

#### **Special Services (Construction Inspection)**

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).
- Resident Engineer
- Materials Coordinator
- The Document Technician. (The person actively preparing the documentation for the project must possess a current IDOT Construction Documentation certificate. Include the Documentation Certificate Number for IDOT.)
- Materials QA Technician

For definitions and requirements please see the Illinois Tollway Construction Manager's manual found on the Illinois Tollway website at:

[https://www.illinoistollway.com/documents/20184/238197/Construction+Managers+Manual\\_Mar2021.pdf/c1d20972-3408-4de3-8e95-236a13698501?version=2.0&t=1616176095129&download=true](https://www.illinoistollway.com/documents/20184/238197/Construction+Managers+Manual_Mar2021.pdf/c1d20972-3408-4de3-8e95-236a13698501?version=2.0&t=1616176095129&download=true)

Schedule: This project is scheduled to start in 2023. The substantial completion date for this project will be approximately 60 months after authorization to proceed.

The Consultant must have MicroStation capabilities. All final documents shall be submitted in hard copy and electronic format, including a 3-D Model, and follow the CADD Standards Manual per Tollway manuals and standards. All CADD file documents shall be required to contain all record drawing modifications. 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.



**1.5.2 Item 2 RR-22-9269, Systemwide, Program Management and Construction Management Services – Job Order Contracting (JOC)**

This project has 37% D/M/WBE participation goal and 3% VOS/SDVOSBE participation goal.

Project and program management support services are required for the Illinois Tollway's Facility and Roadway Job Order Contracting (JOC) programs. Additionally, Phase III engineering services are required for the construction inspection and supervision of the Illinois Tollway's Facility Job Order Contracting (JOC) program.

The Illinois Tollway's Facility JOC program oversees construction scope of work for facility related repairs and improvements across the Illinois Tollway system. The Illinois Tollway's Roadway JOC program is utilized for small roadway and roadway related work.

This contract shall provide for a three (3) 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.

For the Facility and Roadway JOC programs, the Consultant shall create written joint scopes of work, coordinate site visits with the required Illinois Tollway Departments, review pricing submitted by the Contractors as compared to the Construction Task Catalogue (CTC), assist with contractor coordination, review contractor submittals and facilitate Tollway Department review of those submittals, and process jobs utilizing the eGordian CTC pricing catalog.

The Consultant shall provide the following:

Project Management Support, including, but not limited to:

- Maintain an overall JOC program budget in coordination with the Illinois Tollway and General Engineering Consultant, who serves as the Design Corridor Manager and Construction Corridor Manager.
  - Budget and job order tracking shall be a continuous task. Summary reports shall be issued monthly for use at the Illinois Tollway's Board Meetings.
- Manage the implementation of the Illinois Tollway's Facility and Roadway JOC program, including project cost/budget controls and schedule controls.
- Schedule and attend all joint scope meetings between designers, Facility and Roadway JOC contractors, CMs, and Illinois Tollway staff as required.
- Review the JOC contractor's proposal and line items listed in the proposal against the Construction Task Catalog of the eGordian list.
- Answer questions related to the joint scope meeting.
- Submit the JOC proposal to the Illinois Tollway for approval.

Construction Contract Services, including, but not limited to:

- Assemble and submit Contractor data to the Procurement and Diversity and Strategic Development Departments for approval.
- Prepare and submit Job Order Notice to Proceeds (NTPs) to the Illinois Tollway's Facility and Engineering Departments for approval.
- Distribute NTPs to the JOC Contractors to authorize them to proceed.
- Post NTPs to e-Builder. Vendor will be trained on the Tollway's eBuilder system.
- Assure that shop drawings are submitted for approval to the construction manager (CM).
- Submit project schedules to Illinois Tollway for review and approval on a weekly basis.

- Timelines of projects shall be tracked for all active job orders, including the estimated completion date and current authorized amount. Summary reports shall be issued monthly for use at the Illinois Tollway's Board Meetings.

Phase III Services (Facilities), including, but not limited to:

Provide Phase III engineering services for Facilities JOC related work, including on-site inspection, review layout of contract work, prepare records, maintain documentation, submit pay estimates and any other duties requiring the services of an engineer to complete the work on a timely basis and in accordance with Tollway specifications

Phase III Services (Roadway) Services, including:

- Phase III engineering services for Roadway JOC are anticipated to be provided by "others".
- Coordinate as required with the Roadway Construction Managers.

Firms must be prequalified by IDOT in the following categories:

**Special Services (Construction Inspection)**

In addition, the Consultant shall demonstrate their experience and knowledge of JOC, eGordian, facilities project management, implementation, repair, commissioning, warranties, facility turnover, building systems integration as related to vertical construction, and roadway project management, implementation, repair, and warranties as related to horizontal construction.

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

- The person who will assume duties as Project Manager for all aspects of the work (must be an Illinois Licensed Professional Engineer)
- The Resident Engineer
- The person who will be responsible for contractor coordination on scopes of work\*
- The person who will be responsible for eGordian CTC pricing review\*
- The person who will be responsible for overseeing the program budgets\*
- The person who will be responsible for schedule review\*
- Materials Coordinator
- Document Technician (The person actively performing the documentation on the project must possess a current IDOT Construction Document certificate. Include the Documentation Certificate Number for IDOT.)
- Materials QA Technician

\*The individual responsible for contractor coordination on scopes of work, eGordian CTC pricing review, overseeing the program budgets and schedule review may be listed in more than one key personnel role.

For definitions and requirements please see the Illinois Tollway Construction Managers manual found on the Illinois Tollway website at:

[https://www.illinoistollway.com/documents/20184/238197/Construction+Managers+Manual\\_Mar2021.pdf/c1d20972-3408-4de3-8e95-236a13698501?version=2.0&t=1616176095129&download=true](https://www.illinoistollway.com/documents/20184/238197/Construction+Managers+Manual_Mar2021.pdf/c1d20972-3408-4de3-8e95-236a13698501?version=2.0&t=1616176095129&download=true)

Schedule: This project is scheduled to start in 2023.

The Consultant must have MicroStation capabilities. All final documents shall be submitted in hard copy and electronic format, including a 3-D Model, and follow the CADD Standards Manual per Tollway manuals and standards. All CADD file documents shall be required to contain all record drawing modifications. 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.

**1.5.3 Item 3 RR-22-4863, IL 390, Pavement and Structural Preservation and Rehabilitation, Lake Street (M.P. 6.0) to I-290 (M.P. 13.0), Construction Management Services**

This project has a 37% D/M/WBE participation goal and 3% VOSB participation goal.

Phase III engineering services are required for the construction inspection and supervision for IL 390 Pavement and Structural Preservation and Rehabilitation between Lake Street (M.P. 6.0) and I-290 (M.P. 13.0) in DuPage and Cook Counties, Illinois.

The Consultant will perform on-site inspection, review layout of contract work, provide geotechnical inspection and testing, prepare records, maintain documentation, submit pay estimates 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 may be required to review pre-final contract documents submitted to the Tollway. 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 punchlist work for the project.

Construction Estimate: Category B

Firms must be prequalified by IDOT in the following category:

**Special Services (Construction Inspection)**

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 be responsible for roadway design related issues (must be an Illinois Licensed Professional Engineer)
- The person who will be responsible for structural design related issues (must be an Illinois Licensed Structural Engineer)
- Resident Engineer
- Materials Coordinator
- Document Technician (The person actively performing the documentation on the project must possess a current IDOT Construction Document certificate. Include the Documentation Certificate Number for IDOT.)
- Materials QA Technician

For definitions and requirements please see the Illinois Tollway Construction Manager's manual found on the Illinois Tollway website at:

[https://www.illinoistollway.com/documents/20184/238197/Construction+Managers+Manual\\_Mar2021.pdf/c1d20972-3408-4de3-8e95-236a13698501?version=2.0&t=1616176095129&download=true](https://www.illinoistollway.com/documents/20184/238197/Construction+Managers+Manual_Mar2021.pdf/c1d20972-3408-4de3-8e95-236a13698501?version=2.0&t=1616176095129&download=true)

Schedule: This project is scheduled to start in 2023. The substantial completion date for this project will be approximately 24 months after authorization to proceed.

The Consultant must have MicroStation capabilities. All final documents shall be submitted in hard copy and electronic format, including a 3-D Model, and follow the CADD Standards Manual per Tollway manuals and standards. All CADD file documents shall be required to contain all record drawing modifications. 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.

#### 1.5.4 Item 4 RR-22-4864, Systemwide, Design Services Upon Request

This project has a 24% D/M/WBE participation goal and 3% VOSB participation goal.

Phase II engineering services are required for preparation of contract plans, performing engineering studies and providing other technical services as directed by the Illinois Tollway. Tasks will include design for projects identified by the Tollway, and may include, but not be limited to the following:

1. Pavement rehabilitation
2. Ramp resurfacing
3. Noise wall repairs
4. On call and as-needed work on the Tollway system

The upper limit of compensation will be set at \$2,000,000 to be authorized for use as needed.

The Prime Consultant must be prequalified by IDOT in the following categories:

**Highways (Freeway)**  
**Structures (Highway Bridges: Typical)**

The Tollway will allow a Prime Consultant to meet the prequalification for Structures (Highway Bridges: Typical) through a subconsultant.

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).
- Project Engineer, who is directly involved in the development of the contract documents (must be an Illinois Licensed Professional Engineer).
- Roadway designer, who will be responsible for roadway design related issues (must be an Illinois Licensed Professional Engineer).
- Structural designer, who will be responsible for structural design related issues (must be an Illinois Licensed Structural Engineer).
- QC/QA reviewer of all milestone submittals, who must be an Illinois Licensed Professional Engineer for roadway elements and an Illinois Licensed Structural Engineer for structural elements.

Schedule: This project is scheduled to start in 2023. The substantial completion date for this project will be approximately 60 months after authorization to proceed.

The Consultant must have MicroStation capabilities. All final documents shall be submitted in hard copy and electronic format, including a 3-D Model, and follow the CADD Standards Manual per Tollway manuals and standards. 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:

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

**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 data.**

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 Contract Compliance team 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 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. Note: the percentage inserted in the LOI will take precedence over any other percentage inserted in the SOITEAM data in the event of a discrepancy. 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
  - b) DBE firm(s) to satisfactorily perform the proposed work; and
  - c) 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 CMS-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 Department of Central Management Services. Registration is available at:

<https://www2.illinois.gov/cms/business/sell2/Pages/VeteranownedBusinesses.aspx>

## 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 Forms A or Forms B disclosures (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, DBE/VOSB certification(s) and Exhibit G, 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, LOI and Exhibit G), 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	September 6, 2022
Last Day for Questions no later than 4:30:00 pm Central Time	September 13, 2022
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.	September 27, 2022
<b>Selection Committee Meeting:</b>	November 7, 2022
Estimated Board Approval	December 15, 2022
Estimated Notice to Proceed	February 13, 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 G: Contract Participation
  - 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 22-3 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 **September 27, 2022 4:30:00 P.M.** Central Time (CT). 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></p>	<p>ABCXYZ_SOI01_TM.</p>	<p>Submit as a separate document on</p>

SOI use the team's unique 2-6-character SOI Team Name Code	pdf	e-Builder
<b>Illinois Tollway Standard Business Terms and Conditions</b>	ABC_TC.pdf	Submit as a separate document on e-Builder
<b>Teaming Agreement</b> <b>Illinois Tollway Standard Business Terms and Conditions.</b>	ABC_TC_TM.pdf DEF_TC_TM.pdf GHI_TC_TM.pdf	Submit as a separate document on e-Builder for <b>each Team member</b>
<b>Illinois Board of Elections Registration document</b>	ABC_BOE.pdf	Submit as a separate document on e-Builder
<b>Teaming Agreement</b> <b>Illinois Board of Elections Registration document</b>	ABC_BOE_TM.pdf DEF_BOE_TM.pdf GHI_iBOE_TM.pdf	Submit as a separate document on e-Builder for <b>each Team member</b>
<b>Forms A or B (Disclosures) – are required.</b> To submit use your 2-6-character SOI Firm Name Code followed by DS. <b>Teaming Agreement</b> <b>Forms A or 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	ABC_DS.pdf  ABC_DS_TM.pdf DEF_DS_TM.pdf GHI_DS_TM.pdf	Submit as a separate document on e-Builder  Submit as a separate document on e-Builder for <b>each Team member</b>
<b>Exhibit A</b> – Proposed Staff – Key Project Personnel.  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.  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).  c. QC/QA personnel must be different individuals than staff preparing the documents.  Construction Management Services require the names and resumes of Certified Record Documentation Reviewers and Inspectors that will be assigned to the project. Specific requirements are explained in the Phase III Items.	ABC_ExA.pdf	Submit as a separate document on e-Builder
<b>Exhibit C</b> - Current Obligations, use your 2-6-character SOI Firm Name	ABCWL.pdf	Submit as a separate document on e-Builder

Code, followed by _WL One copy of the Current Obligations Form is required to be completed by the Prime Firm. <b>Teaming Agreement</b> <b>Exhibit C</b> - use the unique 2-6-character SOI Team Name Code followed by _WL_TM	ABCXYZ_WL_TM.pdf	Submit as a separate document on e-Builder. The document should include one form for each team member.
<b>Exhibit D</b> – Availability of Key Project Personnel 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.	ABC_ExD.pdf	Submit as a separate document on e-Builder
<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> .	ABC_ExE_P4G.pdf	Submit as a separate document on e-Builder
<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> .	ABC_ExE_RevP4G.pdf	Submit as a separate document on e-Builder
<b>Exhibit F</b> - Veteran Small Business Participation, Utilization Plan and Letter of Intent	ABC_ExF.pdf	Submit as a separate document on e-Builder
<b>Exhibit G</b> – Contract Participation, Current and Past DBE/VOSB /BEP	ABC_ExG.pdf	Submit as a separate document on e-Builder
<b>Exhibit H</b> - DBE Participation, Utilization Plan and Letter of Intent	ABC_ExH_DBE.pdf	Submit as a separate document on e-Builder
<b>Firm’s Commitment and Signature Form.</b>	ABC_FCS.pdf	Submit as a separate document on e-Builder
<b>DBE and VOSB Evidence (current certification letters)</b>	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 Forms A or 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 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 Forms A or Forms B for all Team members



## 3.5 DISCLOSURES AND CERTIFICATIONS

### 3.5.1 INSTRUCTIONS FOR SUBMITTING DISCLOSURES

The submittal shall contain either FORMS A OR FORMS B. SOIs submitted without FORMS A or FORMS B shall be deemed non-responsive. 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 Forms A or Forms B when asked to supply an IPB Reference #.

FORMS B shall be returned by Firm(s) that have a current, approved IPG registration.

#### **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

#### **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>

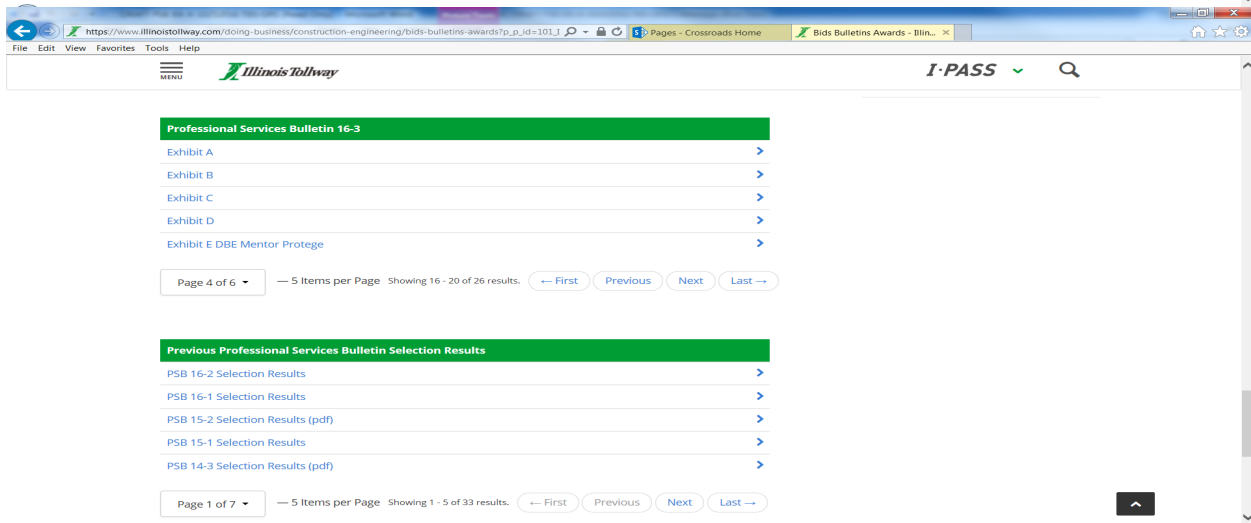
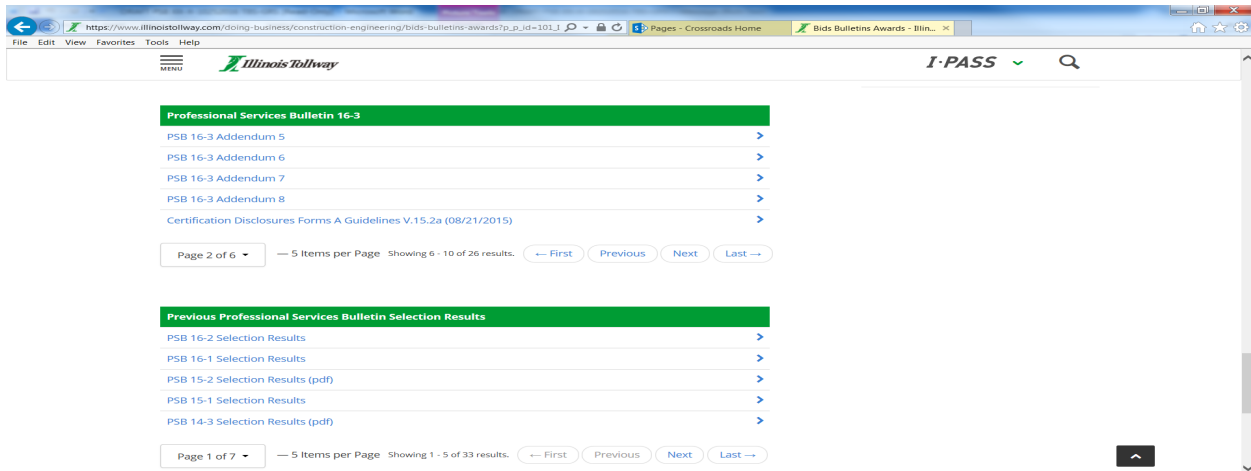
### 3.8 ILLINOIS ePROCUREMENT BidBuy NOTICE

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 22-3 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 five (5) required documents as stated in the PSB:
  - SOI
  - Disclosures (DS)- Forms A or Forms B
  - Exhibit G - Contract Participation (Current and Past DBE/VOSB /BEP Participation with the Illinois State Toll Highway Authority (ISTHA))
- Omission of State of Illinois requirements
- Inability to meet eligibility requirements as stated in 44 Ill. Admin. Code 625.70, Confirmation of Eligibility.