

Attachment I - Appendix X - RFQ Checklist

Appendix X – SOQ Submittal Checklist

The following checklist is provided to assist Design-Build Entities (DBEs) in preparing complete Statements of Qualifications (SOQs). DBEs are responsible for ensuring that all required information is included. Omission of required items may result in the SOQ being deemed non-responsive and rejected.

DBEs are encouraged to submit this completed checklist with their SOQ as a separate appendix.

A. General Submittal Requirements

- SOQ submitted by the stated deadline
- SOQ submitted in searchable PDF format
- SOQ does not exceed 40 pages (excluding resumes and required attachments)
- DBE name included in header or footer of all pages
- SOQ organized in the order prescribed in Section 5.1
- Acknowledgment of all RFQ addenda (if applicable)

B. Required Content – Qualification Requirements (Section 4)

Section 4.1 – License Requirements

- Copy of DBE's valid California Class B contractor's license
- Signed statement confirming all required licenses will be maintained
- Confirmation that required specialty subcontractor licenses will be provided

Section 4.2 – Firm and Key Personnel Experience

- Minimum of four (4) completed projects meeting RFQ requirements
- At least two (2) Design-Build projects identified
- Public safety / essential services projects identified (if applicable)
- Project descriptions include:
 - Project name, location, and owner

- Delivery method
 - Original and final contract value
 - Start and completion dates
 - Owner reference contact information
- Resumes provided for all required key personnel (2 pages max each)
- Organizational chart provided
- Design professionals of record identified (AOR, SEOR, CEOR, LAOR)
- MEPF design responsibility certification provided (if applicable)
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Section 4.3 – Financial Capacity and Bonding

- Surety letter confirming bonding capacity \geq \$54 million
- Surety rated A-/VII or better by A.M. Best
- Signed disclosure regarding bankruptcies, bond claims, or defaults
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Section 4.4 – Safety Record

- Insurance carrier/broker letter confirming current EMR
- EMR of 1.25 or lower documented
- Signed certification regarding Cal/OSHA violations (or explanation provided)
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Section 4.5 – Litigation and Claims History

- Disclosure of all applicable claims, disputes, or litigation within last 5 years
- Required information provided for each matter
- OR signed certification stating no such matters exist
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Section 4.6 – References

- Minimum of three (3) owner/client references provided
- References correspond to projects listed in Section 4.2
- Complete contact information provided for each reference
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Section 4.7 – Insurance Requirements

- Signed acknowledgment of compliance with Exhibit B insurance requirements
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C. Required Appendices

- Appendix A – Resumes of Key Personnel
 - Appendix B – License Copies, Certifications, and Surety/Bank Letters
 - Appendix C – Other Supporting Documentation (if any)
 - Appendix X – Completed SOQ Submittal Checklist (this document)
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DBE Certification

I certify that this Statement of Qualifications is complete and includes all required information in accordance with the City of Petaluma RFQ for the Petaluma Public Safety Facility.

DBE Name: _____

Authorized Representative: _____

Title: _____

Signature: _____

Date: _____