



THE CALIFORNIA STATE UNIVERSITY
1 Harpst Street
Arcata, CA 95521

REQUEST FOR QUALIFICATIONS

WAYFINDING SIGNAGE

Issue Date: October 11, 2023
Closing Date: November 17, 2023

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SECTION 1

Purpose and General Provisions

1.1 Purpose and Summary of Request for Qualifications (RFQ)

Cal Poly Humboldt (University), a campus of the California State University (CSU) system, and its partners in neighboring cities, are proposing to retain the services of a design firm (Service Provider) with verifiable graphic design experience with Wayfinding Signage Systems who meet all requirements of this RFQ. The task of the Service Provider will be to assist the University in developing a design document containing a standard set of sign designs, sign types, and sign locations for the multiple signage needs of the University. The design will also include select wayfinding signage in neighboring municipalities herein referred to as (Partner Cities). The University will be the primary client and contracting authority.

The selected Respondent will enter into a professional services agreement with the University. The anticipated time frame is from December 2023 to December 2024.

Humboldt has long been a place where students come to discover their futures, chart their paths, and become the innovators of tomorrow. Now, as Cal Poly Humboldt, that responsibility has more weight than ever — and we are excited to rise to the challenge.

Cal Poly Humboldt students enjoy an extraordinary college experience, taking small classes taught by professors who know them by name. They live and learn in one of the world's most beautiful places—near ancient redwood forests, mountains and beaches. We are located 275 miles north of San Francisco in the town of Arcata, which is recognized as one of the West's best college towns. A public institution, and the northernmost campus in the 23-campus California State University system, we are one of the best higher education values in the nation.

We have around 6,000 students and offer a wide array of academic choices, with 64 majors and 15 graduate programs in three Colleges. Faculty members are among the top teachers and researchers in their fields. Programs in natural resources and sciences are nationally known, while visual and performing arts are also popular areas of study. Throughout the curriculum, students find a long-standing commitment to social and environmental responsibility.

In general, the scope of services, as outlined in Section 4, is for providing a campus and partner cities wayfinding signage plan and wayfinding design sign standards.

1.2 Managing Office / Trustees' Representative

Managing Office for the Selection Process is:

Name: Addie Dunaway

Campus: Cal Poly Humboldt

Address: 1 Harpst Street. Arcata, CA 95519 Telephone: 707.826.3512

E-Mail: Procure@humboldt.edu

1.3 Submission of Statement of Qualifications

Proposals must be submitted electronically by 3:00 pm November 17, 2023

All submissions shall be addressed to the following:

Name: Addie Dunaway, Procurement Specialist, Contracts & Procurement
E-mail: addie.dunaway@humboldt.edu and procure@humboldt.edu

The purpose of this proposal is to demonstrate your firm's ability to provide the required Services per CSU policy. Respondents are urged to submit concise proposals, appropriate to the scale of the Services as outlined in this RFQ, and include only items that are relevant to these specific Services. For the selection committee's ease in reviewing proposals, please format bookmarks for each section; index and number all pages.

1.4 Questions regarding the RFQ

All questions related in any way to this RFP (technical, contractual, or otherwise) must be submitted prior to the last day for questions detailed in Section 2:

Name: Addie Dunaway, Procurement Specialist, Contracts & Procurement

Telephone: (707) 826-3307

E-mail: addie.dunaway@humboldt.edu and procure@humboldt.edu

Respondents may be interested in investigating the following web sites for additional information:

Facilities Planning and Capital Projects information: <https://facilitymgmt.humboldt.edu/>

CSU requirements: <http://www.calstate.edu/CPDC/>

1.5 Statement of Qualifications Delivery

The Respondent is solely responsible for ensuring delivery no later than the date and time specified.

1.6 Contract Documents

The Respondent firm selected as Service Provider will be required to sign an agreement which will consist of a Service Agreement and applicable exhibits (See Appendix 1). In the event of a conflict between documents, the following order of precedence shall apply:

- A. Agreement with University
- B. The Contract appendices listed in the Agreement
- C. Request for Qualifications (RFQ) and any Addenda
- D. Respondent's Statement of Qualifications

1.7 Errors and Omissions

If a Respondent discovers any ambiguity, conflict, discrepancy, omission or other error in the RFQ or any of its attachments, they shall immediately notify the University of such error in writing and request modification or clarification of the document. Modifications will be made by addendum and referenced at the University's website: <https://procurement.humboldt.edu/bids/services>

If a Respondent fails to notify the University prior to the date fixed for submission of questions of an error in the RFQ known to them, or an error that reasonably should have been known to them, they shall submit a Statement of Qualifications at their own risk, and if they are awarded the contract, they shall not be entitled to additional compensation or time extension by reason of the error or its later correction.

1.8 Addenda

The University may modify this RFP, any of its key action dates, or any of its attachments, prior to the date fixed for submission of proposals, by posting addenda at: <https://procurement.humboldt.edu/bids/services>

1.9 Respondent's Cost

Costs for developing a Statement of Qualifications and proposals for future design phases are entirely the responsibility of the Respondent and shall not be chargeable to the University.

1.10 Rejection of Statement of Qualifications

The University may reject any or all Statements of Qualifications and may waive any immaterial deviation in a Statement of Qualifications. The University's waiver of an immaterial defect shall in no way modify the RFQ documents or excuse the Respondent from full compliance with the specifications if they are awarded the contract. Statement of Qualifications referring to terms and conditions other than the University's terms and conditions may be rejected as being non-responsive.

1.11 Cancellation

While it is the intent of the University to proceed with this appointment, this solicitation does not obligate the University to enter into a contract. The University reserves the right to cancel this RFQ at any time, should the University determine it is in the best interest to do so or if the University loses the required funding. No obligation either expressed or implied, exists on the part of the University to make an award or to pay any costs incurred in the preparation or submission of a Statement of Qualifications.

1.12 Execution of the Contract

It is the current intent of the University to use the evaluation process for each Statement of Qualifications, interviews, and reference checks, to evaluate each Respondent and make any contract awards.

The contract shall be signed by the selected Respondent and returned to the University along with the required attachments (including all required insurance documents) within ten (10) working days of receiving the Agreement from the University. The period of execution may be changed by the University. Contracts are of no effect until approved by the appropriate University officials. Any work performed prior to receipt of a fully executed contract shall be at Service Provider's own risk.

Failure to execute the contract, comply with other requirements, and/or provide all required attachments (including all required insurance documents) within the time frame identified above shall be sufficient cause for voiding the award. If the selected Respondent refuses or fails to execute the contract, the University may award the contract to the next qualified highest ranked Respondent.

This solicitation or any resulting agreement may be used in whole or in part by another California State University (CSU) campus, their Auxiliaries, or any other public agency.

1.13 Statement of Qualifications Disposition

Each Statement of Qualifications becomes the property of the University. Information submitted in the Statement of Qualifications becomes public property and may be subject to disclosure laws. The University reserves the right to make use of any information or ideas contained in submittals. All materials, ideas, and formats submitted in response to this RFQ will become the property of the University on receipt and may be returned only at the University's option and at the Respondent's expense. One copy shall be retained in the University's official files. Specific information contained in a Statement of Qualification such as financials, trade secrets, or proprietary information, which also qualifies for confidential treatment under the California Public Records Act (California Government Code Sections 6250 et. seq.), for which each subject page is clearly labeled and marked as "confidential," will be treated as confidential.

1.14 Non-Endorsement

If a submittal is accepted, the awardee shall not issue any news releases or other statements pertaining to the award of an agreement that states or implies University endorsement of the Respondent's services.

1.15 Indemnification

The University directs your attention to the mandatory requirements for defense and indemnification contained in the Service Agreement. No exceptions to such language are allowed. Any proposed changes to such language will cause the Respondent to be deemed non-responsive.

1.16 Insurance Requirements

The insurance requirements that appear in the Service Agreement, contained in Appendix 1, are mandatory. No exceptions to the insurance requirements are allowed.

Upon award of a Service Agreement, selected Service Provider shall provide appropriate insurance documents within ten (10) working days of receiving the Agreement from the University. The insurance submitted must be approved by the University.

A diligent Respondent would provide the Service Agreement to its insurer, well in advance of the deadline for the Statement of Qualifications, in order to ascertain that the required insurance is available to Respondent as well as the cost to Respondent for such required coverages. No separate charges to the University are allowed for Respondent's required insurance, so each Respondent should carefully consider insurance costs in determining the rates for services on the Cost Proposal.

Respondent who receives notification of an award of a Service Agreement must have current, valid, and compliant insurance coverage effective and in place, in accordance with the terms of the Service Agreement, with required certificates, endorsements, and other documentation in possession of the University within ten (10) working days of receiving the Agreement from the University, or the University may cancel the award.

1.17 Asbestos / Lead Free

Any specified materials or equipment must be certified to be asbestos and lead free.

1.18 Drug-Free Workplace

The agreement with the Service Provider will contain a requirement to maintain a drug-free workplace in compliance with Government Code Section 8355.

1.19 Disabled Veteran Business Enterprise (DVBE) Participation

Responsive to direction from the State Legislature (Public Contract Code Section 10115 et seq.), the Trustees are seeking to increase the statewide participation of disabled veteran business enterprises (DVBE) in contract awards. To this end, Service Provider shall inform the Trustees of any contractual arrangements with consultants or suppliers that are certified DVBE.

1.20 Statement of Compliance

Service Provider will be required to certify under penalty of perjury under the laws of the State of California that the Service Provider has, unless exempted, complied with the nondiscrimination program requirements of Government Code Section 12990 and Title 2, California Code of Regulations, Section 8103.

1.21 Independent Contractor

Service Provider shall act at all times hereunder as an independent contractor. Neither party shall have or exercise any control or direction whatsoever over the manner or methods by which the other party provides services and undertakes its obligations under this Agreement. No agency, employment, partnership or joint venture is intended to be created by this Agreement.

1.22 Vendor Data Record

The Service Provider will be required to complete a Vendor Data Record form in accordance with the rules

and regulations of the California Franchise Tax Board. All vendors doing business with State Agencies are required to submit a completed STD Form 204

1.23 Parking

Parking on campus is by paid permit only. The Service Provider will be authorized to purchase a daily parking permit available at the Information kiosk located at the north end of Rossow Street or any of the ticketing kiosks in our general parking lots, denoted as "G" lots. Cost of parking on campus is not a reimbursable expense, and may not be invoiced by Service Provider.

SECTION 2
Proposed Schedule

EVENT	DUE DATE
Release of Request for Qualifications	October 11, 2023
Pre-Submittal Meeting/Campus Tour (In Person)	October 27, 2023
Last Day to Ask Questions or Request Clarifications	October 31, 2023
Last Day for Campus to issue Addendum	November 3, 2023
Submittals Due	November 17, 2023
List of Shortlisted Firms Published	November 22, 2023
Interviews* (Virtual)	Week of December 4, 2023
Anticipated Notice of Intent to Award	December 15, 2023

* The evaluation committee will select the firms to be interviewed. Those firms selected to be interviewed will be informed of the exact time and place of the interview.

SECTION 3

Qualifications

3.1 Introduction

To be considered responsive to the RFQ, all Respondents shall furnish verifiable evidence that their firm and personnel, at a minimum, meet the requirements in this RFQ.

3.2 Requirements

Each Statement of Qualifications shall provide a description of the professional and technical experience, background, qualifications and professional licensing/certification of the firm's key personnel. The Respondent shall show that the Respondent's firm and primary contact professional possess demonstrated skills and experience in all areas of the project scope of services. The University relies specifically on Respondent's ability to provide the services with staff qualified as, and otherwise in the manner, represented in the RFQ. Respondent hereby warrants to provide the services with staff so qualified as, and otherwise in the manner, represented in this RFQ. In addition, the Respondent must meet all of the following qualifications and requirements to be given consideration.

3.3 Experience

A. Respondent Firm Requirements

1. Respondent Firm experience shall include:
 - a. A minimum of five (5) years of professional experience in designing wayfinding signage plans.
 - i. Within the last five (5) years, Respondent shall have completed the design of at least two (2) wayfinding signage plans for a university campus; OR one (1) wayfinding signage plans for an academic facility; federal, state, or local government agency and one (1) university campus.
 - b. Demonstrated successful experience with projects of a similar scope.
 - c. Demonstrated graphic design and branding skills.
 - d. Having worked with public institutions, City/County Public Works Departments (any city/county in California), Universities.

B. Respondent Firm Desired Experience. The following experience is desirable for the Respondent firm, but not required:

1. Experience working with The California State University system as well as familiarity with the Cal Poly campus.
2. Experience with comparable projects or university master planning with the California State University system.

C. Primary Contact Professional

1. Respondent shall designate one (1) Primary Contact Professional in its Statement of Qualifications who would be assigned responsibility for this work, serve as the primary interface with the University's Project Manager, as well as the primary person to perform work, and to supervise and assure quality control of work performed by other personnel and subconsultants.
2. Primary Contact Professional shall:
 - a. Be a full time employee of Respondent.
 - b. Within the last ten (10) years, Primary Contact Professional shall have experience with designing and implementing at least two (2) wayfinding plans for a university campus.
 - c. Have demonstrated successful experience with projects of a similar scope.
3. In the event of attrition of the designated primary contact professional, respondent shall propose a substitute with equal or better qualifications for the University's review and approval.

D. Other Personnel

1. Identify other personnel of the respondent firm who would be used for purposes of the RFQ and their qualifications.

E. Subconsultants

1. Identify any subconsultants (meaning any individual or entity providing any services or work product) proposed to be used, clearly explain their role and provide resumes (Section 3.4.B).

3.4 Resume requirements

A. Outline the Respondent firm's qualifications including:

1. Brief history of the firm.
2. Range of Services offered.
3. Firm's total number of years of experience providing design services for university projects.
4. Firm's staffing in design services and related support.

B. Resume of Primary Contact Professional, other personnel, and subconsultants.

1. Include copies of all pertinent certificates, accreditations, and licenses.
2. Include contact information for all key personnel: phone, fax and e-mail.

SECTION 4

Scope of Services

Cal Poly Humboldt (University), a campus of the California State University (CSU) system, is proposing to retain the services of an experienced, qualified firm (Service Provider) with verifiable experience designing Wayfinding Signage Systems who meet all requirements of this RFQ. The task of the Service Provider will be to assist the University in developing a design document containing a standard set of sign designs, sign types, sign mounting types, and sign locations for the multiple signage needs of the university and its partner cities. This work will be coordinated with a separate effort led by Cal Poly Humboldt Marketing and Communications Department focused on interior building signage standards as a replacement of our current standards. The wayfinding and sign plan for the University and its partner cities will need to identify designs, dimensions, specifications, drawings, locations, and standards suitable for bidding.

The University is undertaking a Wayfinding Plan to help various target audiences more clearly orient and navigate on campus and in the surrounding partner cities, primarily from key entries, and parking areas to frequently-visited destinations, and from city centers to highway access and off site University properties. The intent of this project is to develop wayfinding standards and designs for the University campus and partner cities with the intent to phase implementation of the signs. The goals of the Wayfinding Plan are as follows:

- To provide standards and guidelines for current and future wayfinding needs by considering existing needs and future growth.
- Consider the current and future use of digital displays and other signage technology.
- To provide future-proof and maintainable designs and standards.
- To provide the University with recognizable main and secondary entrances to the campus that complement the University's architectural, brand, and cultural identity.
- To define a hierarchy of experience and appropriate progression of information.
- To provide clear and intuitive navigation information to motorists, bicyclists, and pedestrians in and from our partner cities.
- To provide clear and intuitive navigation information to pedestrians while on campus.
- To improve the visibility and utilization of the existing parking lots, off-site parking, and transportation options.
- To provide design standards and specifications for exterior building signs.
- To provide new wayfinding sign designs and sign locations within partner cities.
- To provide a comprehensive wayfinding plan for the main campus accessible routes.
- To provide sign designs and locations for pedestrian wayfinding.
- To provide guidelines and recommendations for interior wayfinding and directional signage.

The principal targeted audiences include the following:

- First-time visitors
- Infrequent visitors or those who are going to an unfamiliar part of campus
- Prospective students, parents, faculty, and staff
- Current students, faculty, and staff conducting business with a department
- Current students, faculty, and staff with accessibility needs navigating campus
- Community members who will see the edge of campus even if they do not enter

Implementation of the Wayfinding Signage Plan will be conducted in phases as funds become available and as the infrastructure components of the Master Plan are constructed. The main objective of Phase 1 of the Campus Wayfinding Signage Plan is to develop a design document containing a standard set of sign designs,

dimensions, and locations for the multiple signage needs of the University and its partner cities. This plan will serve as a reference for new sign projects as they arise. Respondents will provide in their submittals a detailed plan on how they recommend the future phases be structured, including their vision and direction, to achieve the goals of the Wayfinding Signage Plan.

The duties of the Service Provider are as outlined below.

4.1 General Responsibilities

Due Diligence in understanding CSU and the University contracting policies and sample agreements. Understanding and command of the work completed to date including but not limited to current branding strategies, current physical master plan (Campus Physical Plan), the Cal Poly Prospectus, and the University's strategic plan.

4.2 Service Provider Scope of Services:

A. Plan Development

1. Statement of the project's goals, activities to be accommodated, and special requirements or considerations that will guide development of the Wayfinding Plan.
2. Summary of key requirements of governing codes and regulations, including major program requirements and constraints, and analysis of project delivery options and strategies.
3. Collaborate with the University to develop the overall aspirational goals of the project, including target audiences, identifying key stakeholders and partner cities.
4. Identify vehicle circulation patterns for motorists entering campus to parking associated with major campus event areas. Include an assessment of pedestrian circulation patterns along and from these entries.
5. Identify location and type of navigation aids to support motorists from entry to parking.
6. Identify circulation patterns and resulting appropriate locations for campus directional kiosks to serve those who have parked their car and are walking to major event areas. This will involve identification of those destinations most sought by pedestrians (especially motorists-turned-pedestrians).
7. Identify pedestrian circulation patterns within the campus and from the City of Arcata.
8. Identify wayfinding opportunities for motorized, non-motorized commuters and walking pedestrians for our off-campus locations.
9. Understand contemporary kiosk and information portal design and present options that are coordinated with our existing (or adaptation of existing) architectural style, and propose an accessible conceptual kiosk design.
10. Evaluate entrance identity and functional conceptual designs (for each of our existing perimeter sign facilities) suitable to the character, and cultural identity of the University.
11. Prepare and document the preferred option that reflects the goals of the wayfinding signage plan.
12. Prepare and document the preferred option that reflects the goals of interior building wayfinding in coordination with the University led, Interior room identification signage.
13. Develop conceptual representative graphics of the preferred concept for the use in conveying the goals of the project.
14. Develop conceptual energy analysis and cost estimates for the preferred/recommended signage.
15. Develop a phasing plan that balances repair, replacement, enhancement and new installations to fit within the University's fiscal constraints.

B. Program

1. General

- a. Development and documentation of detailed requirements for the project, covering design objectives, limitations, and criteria; space requirements; spatial relationships; needs for flexibility or expandability; special equipment and systems; site requirements; and project budget requirements.

2. Establish Goals and Objectives

- a. Purpose: Work with the Project Committee to solicit and suggest broad goal statements to guide the Wayfinding Plan.
- b. Goals: Organize University goals and how Wayfinding Signage fits into the Campus Master Plan.
- c. Form and Image Goals: Aesthetic and psychological impact of design, relationship to surroundings, integration with partner cities, context implications.
- d. Economic Goals: Total project budget, attitude toward initial costs versus long-range operating and maintenance costs, level of quality desired, attitude toward conservation of resources and sustainability.

3. Gather Relevant Information

- a. Purpose: Based upon goals, determine and research relevant information.
- b. Information includes: Facility users, activities, and schedules; future growth and flexibility; policy standards for minimum area for various functions; energy usage and requirements; code information affecting implementation of the Wayfinding Signage Plan. Site analysis; site boundaries; adjacent functional areas, buildings, events; traffic circulation – pedestrian, bicycle, service vehicles and automobiles; utility availability; topography; views; built features; climate; vegetation and wildlife; existing and future facilities.

4. Identify Strategies

- a. Purpose: Illustrate strategies to accomplish identified goals based on functional relationships and circulation connections between spaces, or other aspects of special relationships.
 - i. Flexibility: Types of signs that allow changes for various special events.
 - ii. Flow: Goods, services and people, and what is needed at each step of the way to accommodate that flow.
 - iii. Priorities and Phasing: Prioritize most important functions of the Wayfinding Signage Plan, future replacements, life-cycle costs, modifications or installations; maintenance of existing and future signs.

5. Program Summary

- a. Purpose: State the problem clearly and concisely.
- b. Document pertinent information and write salient summary statements defining results, including statements to cover the following:
 - i. Existing and recommended Wayfinding Sign locations.
 - ii. Identify performance requirements to determine satisfaction of the needs of users

of the Wayfinding signs.

- iii. Identify measurable outcomes of a successful Wayfinding Sign Plan.
- iv. Form/Site: Identify and abstract influences on the Wayfinding Sign designs, including the major form-giving influences of the locations, the salient environmental influences, and the quality of the project and its implications.
- v. Building/Economy: Budget and its influence on the preferred design, including initial budget and life cycle costs.

C. Cost Estimates

1. Service Provider shall employ the services of cost estimators.
2. Cost Estimators Scope of Services:
 - a. Reflect the best professional estimate of actual costs anticipated.
 - b. Economic Feasibility: Balance budget based on the project requirements, quality of construction, money budgeted and time. Recommend phasing of implementing signs to fit within University's fiscal constraints.
 - c. Break-out estimate into four separate parts: repair, replacement, enhancement, new installation.
 - d. Identify options for cost control.
 - e. The University may opt to hire a second estimator to validate assumptions and the Service Provider's cost estimators will work to reconcile the cost estimates and scope definition at no additional cost to the university.

D. Schedule

1. General: Develop and illustrate project tasks and milestones based upon the goals for the projects.

E. Deliverables

1. Circulation and siting sketches over existing campus maps
2. Circulation and siting sketches over existing partner cities maps
3. Conceptual Design sketches for entry treatments
4. Conceptual sign standards for sign text/graphics, sign mounting types, and sign locations as a basis for signage design by others.
5. Sample representative signs
6. Production Drawings
7. Design and scope of work packages for fabrication and installation of the wayfinding system in future work phases and as a whole including specification and standards. These would be used for bidding public work
8. Sign designs, dimensions, specifications, drawings, and standards suitable for bidding.
9. Cost Estimates: Refer to Section 4.2.C.
10. Schedule: Refer to Section 4.2.D.

4.3 Campus Meetings

- A. The Service Provider shall attend a minimum of four (4) on-campus working committee meetings.

B. A partial list of anticipated meetings is included below:

1. Organization Meeting (Virtual)

- a. Attendees: Service Provider Project Team, including consultants, and University Project Committee Members.
- b. Purpose: Discuss how decisions will be made, initial set of goals from University, schedule of activities, including critical meeting dates and times; verify content and organization of final reports; and coordinate use of computer applications.

2. Sign/Plan Development Meetings

a. Kickoff Meeting (In Person)

- i. Attendees: Service Provider Project Team, Project Committee Members and Partner Groups.
- ii. Purpose: Clearly designate format and goals of sign/plan development meetings, explain what information is needed and when.

b. Individual User and Partner Interviews (Virtual)

- i. Attendees: Representative of each User and Partner Group
- ii. Purpose: Collect specific data, test documented information, and plan next level of detail.
- iii. At least one follow-up meeting with each user group to present findings.

c. Work Sessions (minimum of two in person)

- i. Attendees: Service Provider Project Team, University Project Committee Members, and Partner Groups (as necessary)
- ii. Purpose: Report implications of information to client for confirmation, identify conflicts needing reconciliation, identify issues yet to be resolved, test feasibility of project (balance budget with quality of construction, and consider alternatives that result in balanced budget), make final revisions.

d. Wrap-up Meeting (In Person)

- i. Attendees: Service Provider Project Team, University Project Committee Members and Partner Groups
- ii. Purpose: Present results of Programming effort, and request informal approval of program.

4.4 Regulatory and Compliance Aspects

Service Provider must comply with all applicable laws, rules, and regulations applicable to the work and the work product, including but not limited to the following:

- A.** Assuring conformance with requirements of the California Division of Occupational Safety and Health (CDOSH), Health department and other regulatory agencies.

- B.** Assuring compliance with federal, state, county and local government requirements.
- C.** Assuring timely, complete, and fully detailed work.
- D.** Assuring compliance with CSU Sustainability Guidelines
- E.** Assuring compliance with all Accessibility Requirements (as described below in this subsection) in order to provide access and circulation full use of the Wayfinding Signs by persons with disabilities. This includes assuring compliance with accessibility design requirements that provide solutions for access for persons with disabilities and providing a complete and fully detailed analysis of compliance with the California State Accessibility Regulations, and any other disability accessibility laws and regulations adopted or implemented from time to time. "Accessibility Requirements" means construction and alteration requirements of Titles II and III of the Americans with Disabilities Act of 1990, the United States Department of Justice's regulations implementing Title III, including the ADA Standards for Accessible Design, California State Accessibility Regulations (including but not limited to California Code of Regulations, Title 24, California Building Code, inclusive of the Uniform Building Code modified with California supplemental sections, Uniform Mechanical Code, Uniform Electrical Code, Uniform Fire Code, Energy Conservation Code, and Accessibility Standards, as adopted by the California Building Standards Commission), and any other applicable disability accessibility laws, regulations, rules, or orders in effect, adopted, or implemented from time to time.

SECTION 5

Statement of Qualifications, Instructions, and Format

5.1 Introduction

To be considered responsive to the RFQ, the Respondent must submit a Statement of Qualifications in the format identified in this Section. All requirements and questions in the RFQ must be addressed and all requested data must be supplied. The University reserves the right to request additional information, which in the University's opinion is necessary, to assure that the Respondent's competence, number of qualified employees, business organization and financial resources are adequate to perform according to contract.

5.2 Submittal

The Statement of Qualifications submitted may be modified after its submission by withdrawal and resubmission prior to the date and time specified for proposal submission. Modification offered in any other manner, oral or written, will not be considered. The University may change the submittal due date by addendum.

5.3 Questions, Interpretations or Clarifications

All questions related in any way to this RFP (technical, contractual, or otherwise) must be submitted prior to the last day for questions detailed in Section 2:

Name: Addie Dunaway, Procurement Specialist, Contracts & Procurement
Telephone: (707) 826-3307
E-mail: addie.dunaway@humboldt.edu and procure@humboldt.edu

5.4 Statement of Qualifications Format

Each Statement of Qualifications shall adhere to the following format for organization and content. A Statement of Qualifications must be divided into the individual sections listed below, indexed, and tabbed.

- A. Cover Letter:** Provide a cover letter that references the RFQ and confirms that all elements of the RFQ have been reviewed and understood. The cover letter shall be signed by an individual who is authorized to bind the Respondent contractually.
- B. Table of Contents:** A Table of Contents shall be included in the Statement of Qualifications.
- C. Respondent's Qualifications/Experience:**
 - 1. This section shall contain responses to all items specified in Section 3, clearly identifying compliance with all required experience, credentials, and other requirements.
 - 2. In addition to those requirements, Respondent shall also include a list of two (2) previous clients including contact names, current e-mail address and telephone numbers, including location, type of project and delivery method, date of project work, length of project, design and construction contract value, brief description of the work, and name of project owner. As part of the selection process, the University may contact the Respondent's references and the owner of any projects listed in the Statement of Qualifications.
- D. Organizational Capability and Commitment:** This section should demonstrate an overall understanding of the requirements for this work, the Respondent's ability to meet the requirements and the Respondent's commitment of resources to be applied to this requirement.

E. Project Approach / Methodology: Respondent shall provide a conceptual approach to the methodology to be used in response to Section 4, Scope of Services. Include the name of the responsible individual who will lead the contract with the University in coordination and execution of the services, and the location where management and coordination of services will be performed. Respondents shall provide a discussion of the following items in their project approach:

1. Process / steps of gathering relevant information.
2. Methods for involving the primary project stakeholders as well as other interested parties.
3. Methods for addressing the needs/wants/preferences of the different stakeholders.
4. Recommendation for who should be involved in the process.
5. Tools for gathering and prioritizing divergent expectations.
6. Methods of seeking input from technical stakeholders, such as IT, to address the need for IT infrastructure.
7. Methods or tools utilized to communicate to the primary stakeholders and to other interested parties throughout the course of the project.
8. What methodologies will your team employ to ensure that project funding, as it becomes available, has the greatest impact possible?
9. What tools or strategies might you provide to help support the University in fundraising efforts to implement the Wayfinding Signage Plan?
10. What challenges do you foresee with designing and implementing the Wayfinding Signage Plan and how might your team address them?
11. What opportunities do you see associated with this project and how do you intend to leverage your team's experience to take advantage of them?
12. What tools or strategies will you use to assess the effectiveness of the University's existing Wayfinding Signs?
13. What tools or strategies will you provide to measure the effectiveness of a new Wayfinding Sign Program, including the design of the signs and the recommended sign locations?
14. What expectations do you have of the University? What information should we be ready to communicate to you and how might we organize to guarantee success?

F. Budget: Respondent shall clearly demonstrate that their firm has the ability to bring projects in on budget.

G. Organizational Chart: Include an organizational chart showing, at a minimum, the key personnel to be assigned to the University and their reporting relationship within the organization. Include consultants proposed to be used and describe their role.

H. Staffing Matrix: Respondent shall provide a one-page staffing matrix that summarizes the relevant experience of the team proposed for this project. The one-page staffing matrix shall include the following information for each member of the Respondent's project team, including subconsultants:

1. Staff Member name
2. Firm Name/Title
3. Role the team member will perform for this project
4. Years of experience with the firm
5. Years of experience with similar projects
6. Percentage time commitment to this project

- I. **Cost Proposal and Hourly Rates:** Respondent shall provide an hourly billing rate for each job classification and all personnel. Hourly billing rates shall include, but are not limited to the following: labor, materials, overhead and profit, general and administrative expenses, equipment, travel between Respondent's office and the University, parking on the University campus, postage, printing, computer, communications (including e-mail), phone, fax, reimbursables, allowances and cost of insurance. With the sole exception of permitted reimbursables. Respondent shall neither list fees on a rate sheet nor invoice for the aforementioned items.

The University reserves the right to negotiate any and all cost proposals or hourly rates proposed by Service Provider

- J. **Exceptions:** Any and all exceptions to the RFQ must be listed on an item-by-item basis and cross-referenced with the RFQ document. **If there are no exceptions, Respondent must expressly state that no exceptions are taken.**
- K. **Sample Work:** Include at a minimum two (2) examples of Wayfinding Sign Plans including Wayfinding Sign Designs for a University campus. An example completed within the last five (5) years, and one example completed within the last 5-10 years. Respondents are urged to provide concise SOQs, and therefore exemplars should include only items that are relevant to this specific project. Any PDF samples included in the Statement of Qualifications shall be formatted to standard 8 ½" x 11" size paper, or alternatively, 11" x 17" size.

5.5 Preparation

The Statement of Qualifications should be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of the RFQ. Submittals should emphasize the Respondent's demonstrated capability to provide services of this type. Technical material describing the proposed services and extent of support included in the proposal should be included as part of the proposal. Emphasis should be concentrated on completeness and clarity of content.

5.6 Completion of the Statement of Qualifications

The Statement of Qualifications shall be complete in all respects as required by this RFQ. A submittal may be rejected if conditional or incomplete, or if it contains any alterations or other irregularities of any kind, and will be rejected if any such defect or irregularity could have materially changed the quality of the Statement of Qualifications. Any Statement of Qualifications which contains false or misleading statements, or which provide references, which do not support an attribute or condition claimed by the Respondent, may be rejected. If, in the opinion of the University, such information was intended to erroneously and fallaciously mislead the University in its evaluation of the Statement of Qualifications, and the attribute, condition, or capability is a requirement of this RFQ, the Statement of Qualifications will be rejected. Statements made by a Respondent shall be without ambiguity and with adequate elaboration for clear understanding.

SECTION 6
Evaluation and Criteria

6.1 Introduction

It is the policy of the University that the selection of firms to provide professional services shall be on the basis of demonstrated competence and on the professional qualifications necessary for the satisfactory performance of the services required. Further, these services are to be obtained at a fair and reasonable cost to the CSU. The University reserves the right to negotiate any and all costs proposals or hourly rates proposed by Service Provider.

The University will put each Statement of Qualifications submitted through a process of evaluation to determine responsiveness to the University's needs. The University reserves the right at any time to reject any or all Statements of Qualifications. The University reserves the right to make no contract awards. Award of contract, if made, will be to the Respondent who is responsive to all administrative and technical requirements of the RFQ and who receives the highest overall points in accordance with the methodology described in Section 6, Evaluation and Criteria.

6.2 Evaluation Method

- A. RFQ Compliance Check:** Each Statement of Qualifications shall be reviewed to verify that minimum requirements have been met. Any Statement of Qualifications that has not followed the requirements in this RFQ, does not meet minimum content and quality standards, or takes unacceptable exceptions to the model contract, may be eliminated from further consideration.
- B. RFQ Analysis:** Each Statement of Qualifications will be independently analyzed by members of an evaluation team. The evaluation team will analyze how the firm's qualifications, experience, professional content, and proposed methodology meet the University's needs. Points will be assigned by each committee member using the Point Scoring Schedule as a guideline.
- C. Interviews:** The evaluation team will conduct on-campus interviews as part of the final selection of a short list of Respondents.

6.3 Point Scoring Schedule

- A. Statements of Qualifications will be evaluated using the following criteria:**
TOTAL POSSIBLE POINTS: 100

Firm Experience:..... **30 Points**

The Firm demonstrates verifiable experience as outlined in Section 3.3 for excellence and an outstanding record of successfully completed projects.

Personnel Experience: **25 Points**

Firm principal(s) and key personnel shall show experience as outlined in Section 3.3 that qualifies their firm as the one that should be selected.

Project Approach:..... **35 Points**

The SOQ clearly demonstrates the Respondent's approach to the goals of the project and the Scope of Services. Respondents must demonstrate the ability to render high quality planning and design services required by the University.

Interview: **10 Points**

The Firm shall have a concise delivery of services focusing on their experience, methodology and engagement during the meeting.