**GSA Administrative Guide for Placing**

**Restoration Competency Requirements in Construction Contracts**

Competency requirements must be included in all GSA construction contracts for work involving historic building materials. Such work includes replication as well as cleaning, repair, refinishing, conservation and stabilization of historic building materials or finishes. The intent of these requirements is to ensure compliance with federal preservation laws and standards and quality of performance in competitive projects.

Competency requirements are included in Solicitation Evaluation Criteria and applicable contract specifications. The goal is to ensure that projects requiring specialized skills in the repair, replication, cleaning, restoration, or alteration of historic materials are awarded to the *technically competent* offeror providing the lowest price or best value, to minimize change orders, ensure project completion within established budgets and time frames, and to avoid costly damage to ornamental finishes, fixtures, and assemblies. These skill and past performance requirements apply to construction services procured by design-build as well as design-bid-build contracts.

Competency evaluations may be performed only by individuals meeting the Secretary of the Interior’s Qualification Standards for Preservation Professionals, such as the Regional Historic Preservation Officer, GSA preservation program staff or contract preservation specialists approved by the RHPO.

**STEPS FOR PLACING RESTORATION COMPETENCY REQUIREMENTS**

**IN CONSTRUCTION CONTRACTS:**

1. Determine if the building is historic by checking the Historic Building Database. If the building is on the list, contact your GSA Regional Historic Preservation Officer early in project development to incorporate competency requirements into solicitation packages for design and construction services. Consult your RHPO to determine the status of buildings not listed in the database.
2. Include technical competency submission requirements and Evaluation Criteria in the Solicitation for Key Personnel, including individuals performing preservation construction management services and each restoration specialist.
3. Insert competency requirements for each specialist into Division 1 Historic Preservation, Quality Assurance and Historic Treatment Specialist Qualifications.
4. For each type of work requiring specialized preservation skills, insert into the technical specifications applicable standards from the Restoration Contractor Competency Guide.

**RESTORATION CONTRACTOR COMPETENCY**

**CONTRACT REQUIREMENTS GUIDE**

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**PART I - GENERAL INSTRUCTIONS**

1. This Desk Guide tells how to:
2. Create competency specifications for projects involving historic properties
3. Review offerors’ proof of competency submissions
4. Successful construction projects:
5. Include Restoration Contractor Competency requirements in solicitation and contract specifications for projects affecting historic materials.
6. Identify restoration specialties and long-lead material/fabrication needs early in design development.
7. Relate proof of competency requirements directly to specified work as described below.
8. Integrate competency requirements in Source Selection Plan and Evaluation Factors
9. Validate competency project data with reference checks confirming that projects met preservation standards.
10. Allow no substitution for approved firms and technicians without proof of competency as required in contract.
11. There are three parts to every contract's Restoration Competency package:
12. Solicitation: Preservation Construction Specialist Competency documentation & Evaluation Criteria
13. Division 1 Historic Building Treatment Quality Assurance – Specialist Qualifications
14. Historic Building Materials Treatment Specifications

Edit each part as follows:

**Solicitation:** Solicitation submission requirements and Evaluation Criteria alert offerors to preservation construction specialist work categories requiring competency documentation.

**Specifications:** Project submission requirements for each specialty are referenced in Division 1, Historic Treatment Procedures and detailed in the corresponding Technical Specifications.

a. **Division 01 – 013510 Historic Treatment Procedures** - Competency of Restoration Specialist:

1. Identify each Historic Treatment Specialist, based on the scope of work materials, tasks and required skills.
2. Common restoration specialties are listed in this Desk Guide. Each skill required for the specialty has its own qualification standards. However, all specialties and all skills are not listed. Unusual jobs may require creating additional specialties, skills and qualification standard or adjustments to submitted project time frames.

Example:

04500 Stone Restoration - Specialty skills: Repointing

Patching

Dutchmen installation

1. **Technical Specifications**
2. List the restoration skills requiring proof of competency in applicable material specifications. Using the Desk Guide, insert the corresponding qualification standards for each skill. For skills not listed in the Desk Guide, create qualification standards modeled on those listed for similar skills. Tailor quantitative submission requirements (number of projects, project completion year).

Example:

04500 Stone Restoration - Selected specialty skill: Repointing

Qualification Standards:

* 3 projects in 4 years
* Raked mortar without damaging stone
* Matched existing/historic mortar joints in color, texture, profile, and other visual characteristics
* Maintained original joint width

**PART II PROOF OF COMPETENCY**

**Solicitation**

Basic of Award,

Source Selection

**Base Contract**

Proof of Competency

Contract Requirements

Technical Specifications

**Solicitation**

1. Basis of Awardl
2. Definitions
3. Technically Qualified (or competent) Offeror

A technically qualified offeror is an offeror who meets all of the technical qualifications for the categories stipulated in this contract.

1. Non-Responsible Offeror

A non-responsible offeror is an offeror who has failed to complete the forms provided as directed, including submission of photographs, or whose work does not meet the standards for competency as created by the competency clause requirements. GSA reserves the right to reject the bid of any offeror determined to be non-responsible.

**Source Selection**

1. Evaluation of Offers

Lowest technically acceptable offer:

The award may be made without negotiations of proposals. Therefore, offerors are requested to initially submit proposals to the Government on the most favorable terms from a technical and price standpoint.

The lowest price technically acceptable source selection process will be used to obtain the best value. The task order will be awarded to the responsible contractor that provides the lowest priced technically acceptable proposal after evaluation. Contractors shall submit the following non-cost/price factors for evaluation of acceptability only.

Historic Building Project Experience and Past Performance

Description: This factor considers the Offeror’s experience in pre-planning and execution of similar projects, identifying potential risks (risks they do not control on a project that is being competed), how they minimize such risks, how efficiently they plan the work, how efficiently they execute the work (scheduling), did they meet their completion date, did they remain within their budget and overall client satisfaction.

Standard for Evaluation: Using Form 1, included in The Solicitation, offerors shall submit one form for each project to include the following items, presented in a non-technical as possible manner:

1. The Offeror shall submit, not exceeding two (2) pages per project, detailed descriptions of two (2) completed projects for evaluation, with a contact/reference for each project. All projects shall have been completed within the [last five (5) years]. Projects shall be identified by the Offeror as being “Similar” (as defined below) in size, scope, and complexity to the requirements provided in the specifications. Projects shall be identified as being completed in a “Quality” (as defined below) manner. The Offeror is responsible for demonstrating how projects they deem “Similar” are in-fact comparable in size, scope, and complexity. The Offeror is responsible for demonstrating how projects they deem “Quality” were in-fact delivered in a timely manner, within established budgets, and to the customer’s satisfaction.

1. [Two (2) projects] submitted as “Similar” shall be defined for evaluation purposes as an interior or exterior repair or alteration project on or in a the historic” portion of a fully occupied commercial/government office building with an original construction dated between the [years of 1900 – 1940] and listed in or eligible for the National Register of Historic Places. Each project submitted must have a construction value [no less than $150,000.00]. **Projects must have been carried out in a manner consistent with the Secretary of the Interior’s Standard for Treatment of Historic Properties**.

The term “Quality” for evaluation purposes is defined as meeting or exceeding the customer’s requirements as set forth in the construction contract documents, (i.e., drawings and specifications) in a timely manner, within established budgets and with a minimum of disruptions to building operations and occupants. It is also evidenced by receiving satisfactory references, in which those interviewed are willing to contract with the Offeror again.

2. Offeror shall be evaluated on the completeness of Form 1 providing General Project Data, Specific Project Data, Photographs and a detailed Project Narrative and Project References.

1. The offeror or the subcontractor whom the offeror will use for the performance of this work shall meet the competency qualifications defined in SECTION 01350 Historic Preservation
2. Standard for evaluation: The standard is “met” when:

1. Submitted projects were “Similar” and completed in a “Quality” manner within the [last five (5) years] as evidenced by the Offeror’s written response and references contacted.

Procedure for evaluation:

1. Offeror’s projects will be evaluated for “Similarity” and “Quality” performance of the contract requirements. The Offerors shall provide project data and references for the project submitted. References provided by the Offeror may be contacted by the Government. Additional references, beyond those provided by the Offeror, may also be contacted. This evaluation will consist of evaluating the offeror’s written response to the RFP and any references contacted.

The General Services Administration, Public Buildings Service, is using the Contractor Performance Assessment Reporting System (CPARS) modules as the secure, confidential, information management tool to facilitate the performance evaluation process. CPARS enables a comprehensive evaluation by capturing comments from both GSA and the contractor. If needed the CPARS may be used to evaluate past performance on additional projects that the contractor has completed.

1. **Base Contract**

Proof of Competency

Division 013510 Historic Treatment Procedures

Technical Specifications

**Base Contract**

**Proof of Competency**

1. The Proof of Competency Technical Qualifications Package shall be sufficiently complete and organized to insure that evaluation can: be made on the basis of its content. Organize Proof of Competency Technical Qualifications as specified in SECTION 01350. Specialty work requiring a determination of competency for this project includes:

EXAMPLE:

1. 04405 - Dimension Stone: Fabrication and installation of stone masonry.

Stone Patching

1. 07315 - Slate Shingles: Fabrication and installation of Slate Roofing.
2. 07600 - Flashing and Sheet Metal: Fabrication and installation of sheet metal ornament.

**Division 013510 Historic Treatment Procedures**

Quality Assurance - Submittal Requirements – Restoration Specialists

1. The requirements specified in this section relate to the determination of competency for the General Contractor and Subcontractors performing specialty work on or adjoining historic building materials as listed below:
2. [LIST APPLICABLE MATERIALS SPECIFICATION SECTIONS]

1. Include technical competency documentation for all firms and personnel identified in this section.
2. Provide required information to the Contracting Officer as part of the formal bid.

1. The offeror and each restoration specialist (firm and individual technicians) must provide the technical competency documentation as described below.
2. Firm capabilities and experience: Provide the firm name, address, telephone number, date, authorized official, title, and corresponding telephone number. Provide information regarding the firm’s facilities and equipment that pertains to your ability to perform the restoration or repair work. Describe your firm's experience - include number of years in restoration construction and specific accomplishments of the firm. Describe in your own words how you will proceed through the contract requirements to perform work applicable to your firm.
3. General Contractors: describe your experience managing historic building projects, including coordination of restoration specialists and partnerships in which your firm played a substantive role in projects that met preservation requirements. [Minimum requirement: must have an individual assigned to the project who has had five years of project management experience on historic building rehabilitation or restoration projects.]
4. Project documentation: Select [three] historic building projects that your firm has completed commendably in the past seven years which are similar in size and complexity to your work in this contract. For each project, include the project name, completed date, location, participating technicians, client reference details and captioned photographs describing how you used your restoration skills to accomplish the work in a manner consistent with the technical specifications and technical competency criteria for this project. Include the client's name, address, and contact person’s name title, and telephone number. Explain the materials and methods in sufficient detail for GSA to determine that the project is similar in complexity to the proposed project. Photographs must be of sufficient quality and detail to illustrate the technicians’ competency.
5. Individual technicians: Provide names, training (include academic and on-the-job training), preservation experience (special commendations, unusual projects), total years performing this specialty work, and work performed on projects of similar size and complexity to this project, if different than projects submitted to establish the firm's competency. List all individuals who might be employed under this contract. Only individuals reviewed and approved under this competency clause may perform work on historic materials under this contract. If additional individuals are added after award of the contract, their credentials must be approved by the Contracting Officer prior to their starting work. Include documentation for construction supervisors or project managers who will be overseeing the restoration specialists or facilitating their coordination with other contractors. [At least one project must include interior or exterior work, as applicable to this project.]

Method of evaluation of technical qualifications:

1. Purpose: To determine the technical competence of the offeror to perform work specified in this contract at the lowest price or best value for the Government.
2. Competency evaluations will be performed by individuals meeting the Secretary of the Interior’s Qualification Standards for Preservation Professionals, either as part of an evaluation panel convened by the Government to review all technical data requested of the offerors, or as the qualified subject matter specialist on the contract team.

**Technical Specifications** [INSERT SPECIFICATION NUMBER AND NAME]

A. Quality Assurance

1. Required technical competency documentation related to this competency clause shall be included with bid package submittals as described in Division 01-3510 Historic Preservation for all technicians who will be performing the following work:

[INSERT APPLICABLE SKILLS E.G. REPOINTING, PATCHING]

1. Project photographs and descriptions shall demonstrate that work was completed in accordance with the Secretary of the Interior’s Standards for Rehabilitation and met the following technical requirements:

[INSERT APPLICABLE SKILL REQUIREMENTS FOR EACH SKILL E.G.,

REPOINTING:

* RAKED MORTAR WITHOUT DAMAGING STONE
* MATCHED HISTORIC MORTAR JOINTS IN COLOR, TEXTURE AND PROFILE
* MAINTAINED ORIGINAL JOINT WIDTH]

INSTALLATION OF NEW MATCHING STONE:

* NO DAMAGE TO SOUND STONE
* NEW UNITS ALIGN WITH EXISTING, MATCHING EXISTING JOINT PATTERN AND CHARACTERISTICS
* VEINING OR WEATHERING RUNS IN SAME DIRECTION AS THAT OF EXISTING STONE]

**PART II – PROOF OF COMPETENCY TECHNICAL QUALIFICATION FORMS**

FORM 1: COMPLETED PROJECTS

TECHNICAL QUALIFICATIONS DATA

SUBMIT A SEPARATE FORM FOR EACH COMPLETED PROJECT.

Minimum requirements:

1. Select [Two (2) - REQUIRE THREE FOR COMPLEX PROJECTS] projects that your firm has completed commendably in past [5 years] which have included restoration or rehabilitation work on [INSERT ONE OR BOTH: BUILDING INTERIORS, BUILDING EXTERIORS performed on similar historic properties and comparable in size and complexity to the proposed project.
2. Complete each area of this form in sufficient detail to allow a determination that the projects submitted are comparable in size and complexity to the proposed project.
3. The client's contact person must provide a satisfactory rating with regard to quality, schedule and cost of project.

FIRM NAME:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PROJECT NAME:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PROJECT ADDRESS:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE COMPLETED:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

WHAT RESTORATION/REHABILITATION ISSUES WERE INVOLVED WITH THIS PROJECT?

EXPLAIN:

HOW DID THIS PROJECT BENEFIT FROM YOUR [PROJECT MANAGEMENT] SKILLS? EXPLAIN:

Minimum requirement: **Project management** skills must have been used on the project.

DESCRIPTION OF MATERIALS AND METHODS USED TO PERFORM THE RESTORATION/REHABILITATION WORK:

**(Provide photos (overall and close up) that show quality of work. Include building identification and view)**

DESCRIPTION OF PHOTO VIEW #1:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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DESCRIPTION OF PHOTO VIEW #2:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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DESCRIPTION OF PHOTO VIEW #3:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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FORM B: EXAMPLES OF OFFEROR'S COMPLETED PROJECTS (Page 3 of 3)

DESCRIPTION OF PHOTO VIEW #4:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DESCRIPTION OF PHOTO VIEW #5:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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CLIENT NAME:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

CLIENT ADDRESS:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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CONTACT PERSON and TITLE:\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TELEPHONE NUMBER AND EMAIL:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**REVIEWING PROOF OF COMPETENCY SUBMISSIONS**

**REVIEW CHECKLISTS**

TECHNICAL COMPETENCY REVIEW – GENERAL CONTRACTOR

Bldg.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Review No.\_\_\_\_\_\_\_

Facilities: \_\_\_Adequate \_\_\_Not adequate Submit:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Mgmt.: \_\_\_Adequate \_\_\_Not adequate Submit:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Proposed Approach: \_\_\_Approved \_\_\_\_\_Not approved because\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TECHNICAL COMPETENCY REVIEW – RESTORATION SPECIALISTS

Bldg.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project Review\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ No.\_\_\_\_\_\_\_\_

Project: \_\_\_Approved \_\_\_Not approved Completion date met? \_\_\_Yes \_\_\_No

Comparable work? \_\_\_Yes \_\_\_No, because\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Successful? \_\_\_Yes \_\_\_No, because\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Photos provided? \_\_\_Yes \_\_\_No Illustrative? \_\_\_Yes \_\_\_No

Approved Technicians:

TECHNICAL EVALUATION SUMMARY

Bldg.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Contract\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SUBMISSION NO.:\_\_\_\_\_\_\_\_\_\_ \_\_\_COMPLETE-Specialist approved \_\_\_INCOMPLETE-Resubmit

\_\_\_REJECTED-Project submission indicates not competent in this specialty

Firm info. Complete? ­­\_\_\_Yes \_\_\_No Submit\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project info. Complete? \_\_\_Yes \_\_\_No

Provide missing data for:

Project 1\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project 2\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project 3\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Submit photos for: \_\_\_Project 1 \_\_\_Project 2 \_\_\_Project 3

Submit both forms & photos for \_\_\_\_\_ more projects

Enough technicians competent? \_\_\_Yes \_\_\_No Submit\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other information required\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**REVIEW MEMORANDUM FORMAT (SAMPLE)**

Memorandum For Jesse Bowen

Contracting Officer

Construction Contracts Branch)

From: Gonzalo Cespedes

Project Officer (WPOC)

Through: John Smith

Historic Preservation Architect

For Jane Doe & Associates, Architects

SUBJECT: Offeror Competency Evaluation - Second Submission

Pension Building - Galleries Rehabilitation

GS11P93MKCOO40"U"

The Competency of Offeror submission by Marlowe Heating and Air Conditioning on behalf of the restoration specialists listed below is complete. No further submissions are required.

04500 Unit Masonry Repair Specialist: Marlowe Heating and Air approved

Approved technicians:

Gary W. Marlowe

Marvin Murphy

09200 Specialist: D. L. Boyd Plastering, Inc. approved

Approved technicians:

Leonard Groomes

Michael Santoro

Only approved technicians may perform work on this project.

A detailed review of the submission is provided on the attached forms. If you have any questions, please call John Smith at 202-222-2222.

cc: Richard Judson, North Construction District (WPCON)

Andrea Mones-O'Hara, Regional Historic Preservation Officer (WPT)

**PART IV - QUALIFICATION STANDARDS FOR SPECIALTY WORK**

RESTORATION SPECIALTIES (listed alphabetically): PAGE

Bird Deterrent System 18

Demolition 18

Excavation 18

Flashing and Gutters 18

Flooring, Ceramic (See Tile)

Flooring, Resilient 19

Flooring, Wood 19

Glass 20

Hardware 20

Leather 21

Masonry Cleaning and Coating - Clay, Stone, Concrete 21

Masonry Repair/Repointing - Brick, Terra Cotta, Cast Stone 22

Masonry Repair/Repointing - Stone 23

Masonry Repair - Concrete 24

Metals 25

Painting 26

Painting, Ornamental 26

Plaster, Ornamental 27

Roofing - Clay Tile 27

Roofing - Slate 27

Roofing - Metal 27

Selective Demolition (See specific specialty trade)

Stucco 28

Terrazzo 28

Tile 28

Windows, Aluminum, Steel and Bronze 29

Windows, Wood 30

Wood, Architectural 31

Wood Doors (See Wood, Architectural)

Wood, Structural 32

RESTORATION SPECIALTIES (CSI indexed): PAGE

02400 Demolition (Building Demolition) 18

31000 Selective Demolition - Do not use\*

02200 Earthwork (Excavation) 18

03330 Architectural Cast in Place Concrete 18

03450 Architectural Precast 22

04210 Clay Masonry 21

04400 Stone Masonry Restoration and Cleaning 21

04900 Cast Stone 22

04700 Sheet Metal Fabrications 25

05700 Ornamental Metalwork 25

06100 Rough Carpentry 32

06400 Architectural Woodwork 30

073126 Slate Shingle Roofing 27

07320 Roofing Tile 27

07620 Flashing and Sheet Metal (Flashing, Gutters) 18

07610 Sheet Metal Roofing 27

08140 Wood Doors 30

08510 Steel/Bronze Windows 29

08510 Aluminum Windows 29

08520 Wood Windows 30

08710 Door Hardware 20

08800 Glazing 20

09220 Lath and Plaster (Ornamental) 27

092423 Portland Cement Plaster (Stucco) 28

09300 Ceramic Tile 28

09660 Terrazzo 28

09640 Wood Flooring 19

09650 Resilient Tile Flooring 19

09900 Painting (Plain, Ornamental) 26

108113 Pest Control (Bird Deterrent Systems) 18

120513 Fabrics (Leather) 21

\*Use appropriate material specification sections

**PART IV. QUALIFICATION STANDARDS FOR SPECIALTY WORK**

MINIMUM STANDARDS REQUIRED FOR MEETING COMPETENCY IN THE FOLLOWING AREAS OF SPECIALTY WORK: The following list is organized alphabetically by the area of specialty work, particular skills required within the area of specialty work, and the minimum standard for qualitative experience to be applied to that skill:

**BIRD DETERRENT SYSTEMS -108113PEST CONTROL**

Anchoring into masonry joints:

* 3 projects in 3 years
* no damage/no drilling into masonry units

Installing netting on ornamental surfaces:

* 3 projects in 3 years
* netting was installed inconspicuously: taut, with clean edges (no sagging or bunching), conforming to architectural lines

Spot cleaning (water, poultice, or chemical):

* 2 projects in 3 years, using method specified for this project
* no damage to masonry by cleaning products, tools, or equipment
* no soiling of adjoining masonry by cleaning products or rinse water

**DEMOLITION -02400BUILDING DEMOLITION**

Documentation - measured drawings, photography:

* 3 projects in 4 years
* documentation met HABS standards

**EXCAVATION - 02200 EARTHWORK**

Archeological monitoring:

* 2 projects in 10 years

Archeological research:

* Phase I: 3 projects in 3 years
* Phase II: 3 projects in 5 years
* Phase III: 2 projects in 8 years

**FLASHING AND GUTTERS - 07620 FLASHING AND SHEET METAL**

Custom fabrication/replication:

* 3 projects in 4 years
* at least two projects involved replicating configurations similar to those required for this project (e.g., complex curves)

Installation:

* 3 projects in 4 years

Patching/repair:

* 3 projects in 4 years
* no damage to sound metal
* other than material weathering differences, patches/repairs were neatly-executed and inconspicuous
* watertight

**FLOORING, CERAMIC - (See TILE)**

**FLOORING, RESILIENT - 09650 RESILIENT TILE FLOORING:** Includes historic cork flooring, linoleum, rubber tile, and other resilient materials

Cleaning/Refinishing:

* 2 projects in 10 years, involving either cork, linoleum, or rubber tile more than 50 years old
* no damage to flooring by cleaning products, tools, or equipment
* no damage to adjoining finishes
* preserved sound original finishes
* accurately replicated historic finishes, when non-extant or deteriorated

Custom fabrication/replication:

* 2 projects in 10 years, involving either cork, linoleum, or rubber tile
* accurately replicated historic flooring in color, texture, pattern, and other visual characteristics

Installation:

* 3 projects in 4 years, involving any type of resilient flooring

Patching/repair.

* 2 projects in 10 years, involving either cork, linoleum, or rubber tile
* no damage to sound flooring
* repair was inconspicuous
* patches blended with historic flooring in color, texture, pattern, and other visual characteristics
* patches adhered a minimum of one year

**FLOORING, WOOD - 09640 WOOD FLOORING**

Cleaning/refinishing:

* 3 projects in 4 years, involving application techniques similar to those specified for this project
* no damage to/discoloration of wood substrate by cleaning products, tools, or equipment
* no damage to adjoining finishes
* sanding: created no gouges or ridges, secured loose pieces in advance to avoid damage during sanding
* cleaning- preserved existing historic finishes
* refinishing: matched original finish appearance, including color, gloss, and other surface characteristics

In kind replacement/replication:

* 3 projects in 4 years
* wood parquet flooring: at least one project must have involved wood parquet repair/replacement of similar complexity
* accurately replicated historic flooring in color, wood grain character, sizes and configuration of wood pieces, finish and visual qualities

Patching/repair

* 3 projects in 4 years
* wood parquet flooring: at least one project must have involved wood parquet repair of similar complexity
* no damage to sound flooring
* repair was inconspicuous
* patches blended with historic flooring in color, wood grain character, finish, and other visual qualities

Treating unusual conditions (e.g. sun damage, fire damage, water damage):

* illustrate training or experience involving similar problem(s) which enables you to solve this project's problem(s)

**GLASS - 08800 GLAZING**

Custom fabrication/replication:

* 1 project in 20 years, involving similar glass to that required for this project (e.g., structural. figured, stained)
* replicas must have accurately recreated the original glass' color, transparency, polish, and other visual characteristics
* obsolete materials: substitutions for glass products no longer manufactured must have resembled the original glass in color, transparency, polish, figuring and visual characteristics and blended visually with originals

Structural glass patching:

* 2 projects in 10 years, involving either polished stone or structural glass
* patches must have reproduced the original glass' color and surface character sufficiently that patches are inconspicuous and blend with original glass

Structural glass repair/readhesion:

* 2 projects in 10 years, involving either polished stone or structural glass, using similar repair procedures to those required for this project
* repairs were inconspicuous
* no damage to existing sound material

Regrouting structural glass

* 2 projects in 10 years, involving either polished stone or structural glass
* removed unsound grout without damaging stone/glass
* matched existing/historic grout in color, texture, profile, and other visual characteristics

Sealant Installation:

* 3 projects in 4 years, involving structural glass or any stone
* removed old grout/sealant cleanly, without damaging glass/stone
* sealant matched existing grout or glass/stone color
* sealant applied neatly, not spreading onto glass/stone surface
* sealant adhered to both sides of joint
* uniform sealant beds
* watertight installation

**HARDWARE - 08710 DOOR HARDWARE/ 05700 ORNAMENTAL METALWORK**

Cleaning/Refinishing:

* 3 projects in 6 years, involving same type of metal and using techniques specified for this project
* Nickel alloys: 2 projects in 10 years
* no damage to hardware by cleaning products, tools, or equipment
* no damage to adjoining finishes by cleaning products, tools, or equipment
* accurate replication of historic finishes

Replating

* 3 projects in 4 years
* accurately recreated original finishes
* uniform surface appearance
* no damage to hardware

Custom fabrication/replication:

* 2 projects in 10 years
* accurate replication of original hardware in form, material, and finish

Installation:

* 3 projects in 8 years
* no damage to hardware
* no damage to adjoining finishes
* hardware adjusted as necessary to function properly

Repair - soldering, welding, removing dents, replacement of parts, etc.

* 2 projects in 10 years
* no damage to hardware
* no loss of hardware function as a result of repair
* repair was inconspicuous

**LEATHER - 120513 FABRICS**

Cleaning/spot removal:

* 1 project in 20 years
* no damage to leather by cleaning products, tools, or equipment
* no damage to adjoining finishes by cleaning products, tools, or equipment

Custom fabrication/replication:

* 1 project in 20 years
* accurate replication of original leather in color, texture, and other visual characteristics

Repair:

* 1 project in 20 years
* no damage to sound leather
* no damage to adjoining finishes
* repair was inconspicuous

**MASONRY CLEANING AND COATING** - 04210 CLAY MASONRY AND 04400 STONE MASONRY RESTORATION AND CLEANING/ 04900 CAST STONE/ 03300 ARCHITECTURAL CAST IN PLACE CONCRETE/ 03450 ARCHITECTURAL PRECAST: includes Terra Cotta, Brick, Cast Stone, Stone, and Concrete

General exterior cleaning:

* 3 projects in 4 years, using techniques specified for this project
* no damage or discoloration of masonry by cleaning products or equipment

Marble, limestone, polished stone cleaning:

* 3 projects in 4 years, involving the same type(s) of masonry, using techniques specified for this project
* no damage or discoloration of masonry by cleaning products or equipment

Stain removal:

* 3 projects in 4 years, showing use of similar procedures on similar masonry
* no damage or discoloration of masonry by cleaning products or equipment

General Interior Cleaning:

* 3 projects in 4 years, using techniques specified for this project
* no damage or discoloration of masonry by cleaning products or equipment

Interior Cleaning of Polished Stone or Mosaic Tile:

* 3 projects in 4 years, using method specified for this project
* no damage or discoloration of masonry by cleaning products or equipment

Application of Repellent Coatings:

* 2 projects in 5 years
* no damage or discoloration of masonry by coating products or equipment

**MASONRY REPAIR/REPOINTING - BRICK, TERRA COTTA, CAST STONE - 04210 CLAY**

**MASONRY RESTORATION AND CLEANING/ 04900 CAST STONE**

Repointing:

* 3 projects in 4 years, involving either " of masonry listed above, or cast stone (more difficult)
* raked mortar without damaging masonry
* matched existing/historic mortar joints in color, texture, profile, and other visual characteristics
* maintained original joint width
* projects must involve building more than 50 years old (experience with historic materials required)
* no mortar left on face of masonry

Sealant Installation:

* 3 projects in 4 years, involving either type of masonry listed above, or cast stone
* removed old mortar/sealant cleanly, without damaging masonry
* sealant matched existing masonry color
* sealant applied neatly, not spreading onto masonry surface
* sealant applied properly (as directed), including backer rod and weep holes or other means specified for vapor transmission
* uniform sealant beds
* watertight installation

Dismantling and resetting:

* 3 projects in 4 years, involving either type of masonry listed above, or cast stone
* careful removal to salvage existing masonry
* no damage to sound adjoining masonry
* reinstalled masonry aligned with existing units

Matching/replication:

* 3 projects in 5 years, involving either type of masonry listed above
* matched masonry color, texture, size, and other visual characteristics
* For terra cotta projects, at least one project must have involved terra cotta replication

Installation of new (replicate) terra cotta or cast stone:

* 3 projects in 5 years, involving either terra cotta. cast stone, or natural stone
* new units align with existing, following existing joint pattern and pointing characteristics.

Installation of new (replicate) brick:

* 3 projects in 5 years, involving either brick, terra cotta, cast stone, or natural stone
* new units align with existing, following existing joint pattern and pointing characteristics.

Patching:

* 3 projects in 4 years, involving either brick, terra cotta, cast stone, or natural stone
* used similar materials and procedures to those specified for this project
* no damage to sound masonry
* matched color, texture, and other visual characteristics of existing masonry
* maintained original joint locations; patches did not bridge joints

Surface replication of glazed terra cotta, glazed brick, or polished/figured stone:

* 2 projects in 10 years, at least one completed within past 5 years
* projects involved either type of masonry listed above
* matched color, texture, gloss, and other visual characteristics of existing masonry

Crack Repair:

* 3 projects in 5 years, involving terra cotta, brick, cast stone, or natural stone
* no damage to sound masonry
* surface of crack repair matched existing masonry in color, texture, and other visual characteristics
* hairline cracks: grout color matched to masonry or crack raked and pointed/patched with matching mortar

**MASONRY REPAIR/REPOINTING - STONE - 04400 STONE MASONRY RESTORATION AND**

**COATING**

Repointing:

* 3 projects in 4 years
* raked mortar without damaging stone
* matched existing/historic mortar joints in color, texture, profile, and other visual characteristics
* maintained original joint width
* no mortar left on face of stone

Sealant Installation:

* 3 projects in 4 years
* removed old mortar/sealant cleanly, without damaging stone
* sealant matched stone/mortar color
* sealant applied neatly, not spreading onto stone surface
* sealant adhered to both sides of joint
* sealant applied properly (as directed), including backer rod and weep holes or other specified vapor transmission
* uniform sealant beds
* watertight installation

Dismantling and resetting:

* 3 projects in 4 years
* careful removal to salvage existing stone
* no damage to sound adjoining stone
* reset stones aligned with existing units

Cutting:

* 3 projects in 4 years
* careful removal to salvage existing stone
* no damage to sound adjoining stone
* straight and uniform cuts with no irregularities

Matching/Replication:

* 3 projects in 5 years
* matched color, texture, size, surface pattern (if present), and other visual characteristics

Installation of new matching stone:

* 3 projects in 5 years
* new units align with existing, following existing joint pattern and pointing characteristics
* veining or weathering (salvage stone) runs in same direction as that of existing stone

Dutchman installation:

* 2 projects in 10 years
* no damage to sound stone
* matched color, texture, and other visual characteristics of existing stone
* new pieces aligned with existing stone, following existing joint pattern and pointing characteristics
* veining or weathering (salvage stone) runs in same direction as that of existing stone
* joints between dutchman and remaining (partial) stone units are inconspicuous (pieces appear as one on cursory view)

Crack Repair:

* 3 projects in 5 years
* no damage to sound stone
* surface of crack repair matched existing masonry in color, texture, and other visual characteristics
* hairline cracks: grout color matched to masonry or crack raked and pointed/patched with matching mortar

Patching:

* 3 projects in 4 years
* used similar materials and procedures to those specified for this project
* no damage to sound stone
* matched color, texture, and other visual characteristics of existing stone
* matched masonry vapor transmission characteristics
* maintained original joint locations; patches did not bridge joints

Surface replication of polished/figured stone:

* 2 projects in 10 years, at least one completed within past 5 years
* projects involved either type of polished/figured stone, or glazed brick/terra cotta.
* matched color, texture, gloss, and other visual characteristics of existing masonry

**MASONRY REPAIR - CONCRETE - 03120 ARCHITECTURAL CAST IN PLACE/ 03300 CAST IN PLACE/ 03450 ARCHITECTURAL PRECAST**

Sealant Installation:

* 3 projects in 4 years, involving any type of masonry
* removed old mortar/sealant cleanly, without damaging masonry
* sealant matched existing masonry color
* sealant applied neatly, not spreading onto masonry surface
* sealant adhered to both sides of joint
* sealant applied properly (as directed), including backer rod and weep holes or other means specified for vapor transmission
* uniform sealant beds
* watertight installation

Patching:

* 3 projects in 4 years, involving patching of any type of masonry
* used similar materials and procedures to those specified for this project
* no damage to sound masonry
* matched color, texture, and other visual characteristics of existing masonry
* matched concrete vapor transmission characteristics
* maintained original joint locations; patches did not bridge joints
* painted concrete: matched surface texture of existing masonry

Crack Repair:

* 3 projects in 5 years, involving any type of masonry
* no damage to sound masonry
* surface of crack repair matched existing masonry in color, texture, and other visual characteristics
* hairline cracks: grout color matched to concrete or raked and pointed with matching mortar

**METALS - 04700 SHEET METAL FABRICATIONS/ 05700 ORNAMENTAL METALWORK**

Cleaning/refinishing/polishing:

* 3 projects in 4 years, involving same type of metal and using cleaning/refinishing/polishing techniques specified for this project
* Nickel alloys: 2 projects in 10 years
* no damage to metal by cleaning/polishing products, tools, or equipment
* no damage to adjoining finishes
* accurate replication of historic finishes
* cleaning/polishing followed metal grain
* protective lacquer application: smooth, uniform, with no drips or sags
* polishing: matched original polish gloss characteristics

Replating:

* 3 projects in 4 years
* accurately recreated original finishes
* uniform surface appearance
* no damage to metal

Paint stripping:

* 3 projects in 4 years, involving similar techniques to those specified for project
* removed corrosion products completely
* achieved uniform, smooth surface without loss of detail or damage to metal substrate
* no damage to adjoining finishes

Custom fabrication/replication:

* 2 projects in 10 years
* accurate replication of original metal in form, material, and finish

Removal/installation:

* 3 projects in 8 years
* no damage to metals being removed and salvaged
* no damage to new or salvaged metals being (re)installed
* no damage to adjoining finishes

Repair - replacement of parts, cutting, welding, soldering filling dents, patching, etc.

* 3 projects in 7 years, involving similar types of repairs
* no damage to sound metal
* repair was inconspicuous: follows original design, contours, detailing, finish
* left no sharp edges or other safety hazards
* watertight connections between new and existing materials
* repair blended visually with existing sound metal

Painting:

* 3 projects in 4 years
* surface preparation: loose paint removed, surface smoothed/cleaned as necessary to assure adhesion and neat finished appearance
* application: smooth and uniform, with no drips or sags

Sealant Installation:

* 3 projects in 4 years
* removed sealant cleanly, without damaging metal or adjoining materials
* sealant matched existing metal/wall color, as required
* sealant was applied neatly, not spreading onto adjoining surfaces
* sealant adhered to both sides of joint
* uniform sealant beds
* watertight installation

**PAINTING - 09900 INTERIOR AND EXTERIOR**

General:

* 3 projects in 4 years
* surface preparation: loose paint removed, surface smoothed/cleaned as necessary to assure adhesion and neat finished appearance
* application: smooth and uniform, with no drips or sags

**PAINTING, ORNAMENTAL - 09900 INTERIOR AND EXTERIOR**

Replication: Faux finishes/multiple-coat ornamental paint systems:

* 3 projects in 4 years
* accurate replication of ornamental paint system's color, texture, pattern, luminosity, and other visual characteristic
* faux finishes: projects replicated either an existing faux finish, a historic faux finish (based on visual documentation), or an existing natural material in the building
* ornamental paint systems other than faux finishes: as least one project must involve replication of an ornamental paint system similar to that specified for this project (e.g., glazed paint system)

Leaf:

* 3 projects in 4 years
* accurate replication of existing/historic leaf material, color, and other visual qualities

Metallic paints:

* 3 projects in 4 years
* accurate replication of existing or historic metallic paint's color and other visual qualities
* infill/patching: selected paint with similar weathering characteristics to existing, to assure long term match

Stencilling:

* 3 projects in 4 years
* accurate replication of existing or historic stencilling color, pattern, placement, and other visual qualities

Acrylic lacquer application:

* 3 projects in 4 years
* coats applied smoothly and uniformly, with no drips or sags.

Ornamental paint cleaning/conservation:

* 3 projects in 5 years, using techniques specified for the project
* no damage to/discoloration of sound paint by cleaning/conservation materials or equipment

**PLASTER, ORNAMENTAL - 09220 LATH AND PLASTER**

Paint removal:

* 3 projects in 6 years
* restored plaster ornament detailing without damaging substrate

Consolidation: see Ornamental Paint cleaning/conservation

Repair/replication:

* 3 projects in 4 years
* accurate replication of plaster castings or moldings by casting or in place modeling
* new work replicated existing form and surface texture
* replications were comparable in complexity to those in this project
* repairs were inconspicuous
* new work aligned with existing ornament

**ROOFING - 073126 SLATE SHINGLES**

Repair:

* 3 projects in 5 years, involving techniques similar to those specified for this project
* replacement slates matched originals in color, size, and other visual characteristics
* repairs were inconspicuous

Replacement in kind:

* 3 projects in 5 years
* matched original slates in color, size, and other visual characteristics

**ROOFING - 07320 ROOFING TILE - CLAY**

Repair:

* 3 projects in 10 years, involving techniques similar to those specified for this project
* replacement tiles matched original materials in color (including color range, if variegated) and other visual characteristics
* repairs were inconspicuous: new work blended in and aligned with existing

Replacement:

* 3 projects in 10 years
* matched original materials in color, texture, and other visual characteristics

**ROOFING - 07620 SHEET METAL ROOFING:** Standing or flat seam, tin shingle

Repair:

* 3 projects in 5 years, using techniques specified for this project
* matched original metal in color, texture, and other visual characteristics
* matched roof configuration, including contours and ornamental details
* repairs were inconspicuous

Replacement:

* 3 projects in 5 years, at least one project involving the particular roof system specified for project
* matched original materials in color, texture, and other visual characteristics
* matched roof configuration, including contours and ornamental details

**SELECTIVE DEMOLITION** - see specific specialty trade

**STUCCO - 092423 PORTLAND CEMENT PLASTER (INTERIOR AND EXTERIOR)**

Repair/replacement:

* 2 projects in 5 years
* removed unsound stucco without damaging wood/masonry substrate
* new stucco (patches/replaced areas) matched original in color, texture, and other visual characteristics

**TERRAZZO -09660TERRAZZO**

Resurfacing:

* 3 projects in 8 years

Replication (replacement in kind):

* 2 projects in 8 years
* matched color, texture, chip size, and other visual characteristics

Patching:

* 2 projects in 8 years
* matched color, texture, chip size, and other visual characteristics
* no damage to sound terrazzo

Crack Repair:

* 2 projects in 8 years
* no damage to sound terrazzo
* repair not conspicuous: blended with color and texture of adjoining terrazzo

**TILE - 09300 TILE: CERAMIC, MOSAIC, GLAZED WALL, QUARRY, PAVERS 09385**

**DIMENSION STONE - TILE: MARBLE, GRANITE, LIMESTONE, SLATE**

Deep cleaning/stain removal:

* 2 projects in 15 years
* no damage to tile by cleaning products, tools, or equipment

Replication (replacement in kind):

* 2 projects in 8 years
* matched tile color, finish, texture, size, shape, grout color and texture, tile layout, and other visual characteristics
* no damage to sound tile

Crack Repair:

* 2 projects in 8 years
* no damage to sound tile
* repair not conspicuous: blended with color and texture of adjoining tile

Interior Cleaning of Polished Stone or Mosaic Tile:

* 3 projects in 4 years, using method specified for this project
* no damage of masonry by cleaning products or equipment

Application of Repellent Coatings:

* 2 projects in 5 years
* no damage to/discoloration of masonry by mating products or equipment

**WINDOWS - 08510 ALUMINUM/ 08510 STEEL/ BRONZE**

Custom fabrication/replication:

* 2 projects in 8 years
* accurate replication of historic aluminum, steel, or bronze windows in size, and detailing, including muntin profile and configuration

Window removal and installation:

* 2 projects in 8 years, involving removal of existing windows and installation of new or repaired/salvaged windows
* no damage to window frame
* no damage to adjoining finishes
* newly installed windows align with existing frames, operate properly, conform to existing opening sizes

Repair - replacement of parts, soldering, welding, filling dents, etc.

* 3 projects in 7 years
* no loss of window function as a result of repair
* repair was inconspicuous; conformed to existing window detailing
* watertight

Repair - aligning, straightening, restoring operability, repairing weather-stripping

* 3 projects in 7 years
* repair was inconspicuous, no alteration of original window appearance
* watertight

Installing new weather-stripping

* 2 projects in 5 years
* no damage to windows or adjoining finishes
* window operability maintained

Glazing:

* 3 projects in 4 years
* no damage to windows
* replicated historic glazing appearance

Painting:

* 3 projects in 4 years
* surface preparation: loose paint removed, surface smoothed/cleaned as necessary to assure adhesion and neat finished appearance
* application: smooth and uniform, with no drips or sags
* window operability maintained, no openings painted shut

Sealant Installation:

* 3 projects in 4 years
* removed sealant cleanly, without damaging windows or adjoining materials
* sealant matched existing window/wall color, as required
* sealant applied neatly, not spreading onto window or wall surface
* sealant adhered to both sides of joint
* uniform sealant beds
* watertight installation

**WINDOWS - 08520 WOOD WINDOWS**

Custom fabrication/replication:

* 3 projects in 4 years
* accurate replication of historic wood windows in size, and detailing, including muntin profile and configuration

Window removal and installation:

* 3 projects in 6 years, involving removal of existing windows and installation of new or repaired/salvaged windows
* no damage to window frame or building during removal
* no damage to adjoining finishes
* newly installed windows align with existing frames, operate properly, conform to existing opening sizes

Repair - slicing/replacing window members

* 3 projects in 6 years
* no damage to sound wood
* repair was inconspicuous

Consolidation/epoxy fill repair:

* 3 projects in 4 years, using epoxy fill able to be tooled
* no damage to sound wood
* repair was inconspicuous
* patches conform to profile/contours of historic woodwork
* technicians must have successfully completed a minimum of 2 days
* training in use of epoxy product(s), for structural applications, and a minimum of 1 day of training, for non-structural applications

Preservative treatments:

* 2 projects in 5 years
* no damage to sound woodwork
* treatment must be done by, or under direction of, certified pest control operator

Glazing:

* 3 projects in 4 years
* no damage to windows
* replicates historic glazing appearance

Painting:

* 3 projects in 4 years
* surface preparation: loose paint removed, surface smoothed/cleaned as necessary to assure adhesion and neat finished appearance
* application: smooth and uniform, with no drips or sags
* window operability maintained; no openings painted shut

Sealant Installation:

* 3 projects in 4 years
* removed sealant cleanly, without damaging windows or adjoining materials
* sealant matched existing window/wall color, as required
* sealant applied neatly, not spreading onto window or wall surface
* sealant adhered to both sides of joint
* uniform sealant beds
* watertight installation

**WOOD - 06401 EXTERIOR ARCHITECTURAL WOODWORK**

**06402 INTERIOR ARCHITECTURAL**

Cleaning - conserving an existing finish:

* 2 projects in 10 years, involving cleaning techniques similar to those specified for this project
* preserved existing historic finishes (stain and/or surface coatings)
* cleaning of existing shellac, varnish, lacquer finishes: at least one project must have involved conserving an existing surface coating
* no damage to/discoloration of wood substrate by cleaning products, tools, or equipment
* no damage to adjoining finishes
* did not alter original finish color, gloss, or other visual qualities

Stain removal:

* 2 projects in 8 years
* no damage to/discoloration of wood substrate by cleaning products, tools, or equipment
* no damage to adjoining finishes

Refinishing/replicating an historic finish:

* 3 projects in 5 years, involving application techniques similar to those specified for this project
* no damage to wood
* no damage to adjoining finishes
* sanding: created no gouges or ridges
* refinishing: matched original finish appearance, including color, gloss, and other surface characteristics

Finishing - staining, applying shellac, varnish, lacquer, or oil (traditional materials and techniques, not necessarily matching a particular finish)

* 3 projects in 3 years, involving application techniques similar to those specified for this project
* no damage to wood
* no damage to adjoining finishes

In kind replacement/replication:

* 3 projects in 4 years
* accurately replicated historic wood in color, grain character, form, finish and other visual qualities

Patching/repair:

* 3 projects in 4 years
* no damage to sound wood
* repair was inconspicuous
* patches blended with historic wood in color, grain character, finish, and other visual qualities

Consolidation/epoxy fill repair

* 3 projects in 4 years, using epoxy fill
* no damage to sound wood
* repair was inconspicuous
* patches conform to profile/contours of historic woodwork
* technicians must have successfully completed a minimum of 1 day of training in use of epoxy product(s)

Treating unusual conditions (e.g. sun damage, fire damage, water damage):

* Illustrate training or experience involving similar problem(s) which enables you to solve this project's problem(s)

Preservative treatments (active infestations):

* 2 projects in 5 years
* no discoloration of sound, unpainted woodwork o no damage to sound woodwork
* treatment must be done by, or under direction of, certified pest control operator

**WOOD DOORS** (See Wood, Architectural)

**WOOD, FLOORING** (See Flooring, Wood)

**WOOD, STRUCTURAL - 06100 ROUGH CARPENTRY/ 06130 HEAVY TIMBER CONSTRUCTION**

Consolidation/epoxy fill repair

* 3 projects in 4 years, using epoxy fill able to be tooled
* no damage to sound wood
* repair was inconspicuous
* patches conform to profile/contours of historic woodwork
* technicians must have successfully completed a minimum of 2 days training in use of epoxy product(s)

Treating unusual conditions (e.g. sun damage, fire damage, water damage):

* illustrate training or experience involving similar problem(s) which enables you to solve this project's problem(s)

Preservative treatments:

* 2 projects in 5 years
* no damage to sound woodwork
* treatment must be done by, or under direction of, certified pest control operator