

**UMBC & TU  
On Call Roofing  
RFP #BC-20995-K**

**Pre-Proposal Meeting  
April 6, 2017**

John Kenny, Point of Contact  
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**Pre-proposal Meeting Agenda**

- Procurement Process
- RFP Highlights
- Question/Answer Period

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**RFP Sections and Attachments**

- Procurement Schedule
- Section I: Summary Information
- Section II: General Information
- Section III: Technical Requirements and Specifications
- Section IV: Proposals, Evaluation and Forms (5 Articles)
  - Appendix A: Forms to be included in Proposer's Technical Proposals.
  - Appendix B: Price Proposal Form
  - Appendix C: Contract & Contract Affidavit; Performance and Payment Bonds (only the successful firms will be required to complete these forms)
  - Appendix D: UMBC General Conditions for Maintenance
  - Appendix E: Maintenance/Repair Roofing Specifications
  - Appendix F: MBE Program/Forms

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**On Call Roofing Overview**

1. UMBC is going to establish "Master" Contracts with several commercial and institutional roofing firms that will be the prime contractor(s) for three categories of roofing work on behalf of both UMBC and Towson University:

- a) Maintenance/Repair
- b) Roof Replacements
- c) Slate Roofs Repair/Replacements (solely at Towson University)

- Proposers may elect to provide a proposal for one, two, or all of these categories. It is anticipated that a separate list of awardees will result for each category
- Proposers must be experienced and qualified in the category(ies) for which they are proposing. Roof Replacement contractors must be certified by the manufacturer as a factory trained, authorized installer

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**Procurement Process**

- Technical Proposals submittal.
- Technical Proposals will be evaluated before Price Proposals are requested.
- Technical evaluation resulting in a short list of proposers
- Only the short-listed firms will be invited to participate in an Interview Session
- Second Technical Evaluation
- Only the shortlisted firms following the Second Technical Evaluation will be requested to submit a Price Proposal.

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**Procurement Process**

- Price Evaluation
- Final ranking for each proposer for each category of On Call Roofing\*.

**\*Note: It is anticipated that separate awards will result for each category.**

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**Procurement Schedule**

- **Deadline for Questions** is Tuesday, April 11, 2017 by 2:00 p.m. (To be submitted in writing to [jkenny@umbc.edu](mailto:jkenny@umbc.edu))
- **Technical Proposals:** Due on Tuesday, April 18, 2017, at or before 2:00 p.m.
- **Interview Sessions only with the shortlisted firms:** Monday, May 15 and/or Tuesday, May 16, 2017 (times to be determined)
- **Price Proposal:** Anticipated on Friday, June 9, 2017. (privately opened)
- **Contract Award:** Anticipated on or about Thursday, June 22, 2017.
- **Contract Start Date:** Wednesday, 07/05/17 (first replacement project is UMBC Commons)

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**RFP Section I - Highlights**

- Technical Proposals are to be submitted to UMBC's Procurement Office either via:
  - Upload electronically to [Technical.y051rv0tkhcr4o3@u.box.com](mailto:Technical.y051rv0tkhcr4o3@u.box.com)

**OR**

- Hard copy to UMBC's Procurement Office in the form of a CD, thumb drive, or bound paper form.
  - Note: Technical Proposal is to be compiled as one document and provided in pdf and WORD/Excel for ease of use by UMBC.
- Proposers must clearly indicate each and every section of their Technical Proposal which they deem to be confidential, proprietary or a trade secret.
- Late proposals cannot be accepted.

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**RFP Section I - Highlights**

- All questions on this procurement are to be directed via e-mail to John Kenny at [jkenny@umbc.edu](mailto:jkenny@umbc.edu), with a copy to Valerie Rolandelli via e-mail: [vroland@umbc.edu](mailto:vroland@umbc.edu)
- Questions and responses will be sent to all proposers via an addendum.
- Initial term of the contract will be two (2) years with eight (8) one year option renewals at University's sole option.

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**RFP Section II – General Information Highlights**

- Section II provides general information to the vendors.
- By submitting a proposal, a firm agrees that if awarded the Contract, they will be bound under the Contract to all the terms and conditions contained in the RFP documents.
- Any addenda if issued will be posted in the UMBC BOX and on UMBC's eBid Board.


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**Section II – General Information (Continued)**

- Vendors must clearly indicate sections of its Technical Proposal deemed to be confidential, proprietary or a trade secret.
- An overall MBE subcontractor participation goal of 5% of the total cumulative contract dollar amount awarded to each On Call Contractor during the life of the Contract has been established for this procurement. (It is understood that the MBE participation will vary from project to project due to the scope of the work.)


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**Section II – General Information (Continued)**

- The submission of Proposal Security in an amount equal to at least 5 percent (5%) of the price for the UMBC Commons Roof Replacement Project will be required at the time the Price Proposal is submitted.
- Note: This will be applicable for all projects greater than \$100K done under the resulting 'master' contracts.


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**RFP Section III  
TECHNICAL REQUIREMENTS &  
SPECIFICATIONS**

- Implementation of the On Call Contracts
  - On Call Maintenance and Repair, and, Slate Roof Repair/Replacement categories:
    - <\$25,000: University will generally rotate amongst the On Call Contractors for this category; however, reserves the right to competitively procure
    - >\$25,000: University will bid from amongst all On Call Contractors for this category
  - On Call Roof Replacements: University will notify each On-Call Contractor for Roof Replacements who is certified by the applicable roofing material manufacturer, schedule a pre-proposal meeting, and distribute procurement and construction documents.

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**RFP Section III  
TECHNICAL REQUIREMENTS &  
SPECIFICATIONS, continued**

- General description of the work to be performed for all three categories:
  - Roof Maintenance and Repair
  - Roof Replacements (will have separate scope of work/drawings for each project)
  - Slate Roof Repair/Maintenance
- Prevailing Wage (is not applicable to any project under the resulting contracts)

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**Section III – Technical Requirements  
and Specificaiton  
(Continued)**

- ADDITIONAL INFORMATION:
  - UMBC General Conditions for Maintenance Projects
  - SPECIFICATIONS & DRAWINGS for the UMBC Commons Roof Replacement Project will be issued to the shortlisted contractors for roof replacement projects following the second phase technical evaluation.
  - BONDS AND INSURANCE
    - Payment Bonds for all projects greater than \$100K
    - Performance Bonds for all projects greater than \$100K
    - Insurance to include Builder's Risk to cover on call work (as requested for specific projects)

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**RFP Section IV,  
Proposals, Evaluation and Forms  
Article 1**

- Proposal must be signed by an authorized individual(s) of the company submitting the Proposal.

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**RFP Section IV, Article 2  
INFORMATION REQUIRED IN VENDOR  
TECHNICAL PROPOSALS**

- **Forms:** In addition to responses to the technical criteria, the proposal also includes:
  - Transmittal Letter (must indicate which category(ies) of roofing work is being proposed)
  - Detailed responses to Article 2, Item B. Criteria (forms found in Appendix A)
  - Contractor's license
  - Bid/Proposal Affidavit
  - MBE Attachment 1-1A (**MUST BE INCLUDED!**)
  - Acknowledgement of Receipt of Addenda Form

**Note:** All forms to be used in Proposers' technical proposals are available on the UMBC Box and UMBC eBid Board in MS Word format.

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**RFP Section IV, Article 2  
(Continued)**

**1. KEY PERSONNEL:** (See descriptions and requirements for each position on pp 25-26)

- Complete the Key Personnel Form - University form found in Appendix A):
  - the Project Manager (to be provided for all categories of roofing)
  - Three (3) Field Superintendents (to be provided for all categories of roofing)
  - Three (3) Roofing Supervisor or Project Lead (to be provided only for those proposing on Maintenance/Repair category.)
- UMBC will contact the key personnel references listed on this form of the shortlisted Proposers only.

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**RFP Section IV, Article 2  
(Continued)**

**1. KEY PERSONNEL (contd.):**

- By submitting the name of the Key Personnel for consideration under this Key Personnel Section, the Proposer is committing these persons to UMBC and Towson University for this contract's duration if awarded the project. No personnel changes will be permitted without written authorization from the University via a contract amendment issued by UMBC's Procurement Office.

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**RFP Section IV, Article 2  
Technical Proposal Criteria**

**2. FIRM EXPERIENCE:**

- Complete the Firm Experience Form on a total of three (3) similar projects/contracts for each category of roofing for which firm is proposing. (Proposer must complete three (3); six(6), and nine (9) University forms as may be applicable).
- Submitted projects/contracts should reflect the size, complexity, and services required for each roofing category under this RFP.

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**RFP Section IV, Article 2  
Technical Proposal Criteria**

**2. FIRM REFERENCES:**

- UMBC will contact the firm references listed on this(ese) form(s) of the shortlisted firms only. The University reserves the right to check other sources.

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**RFP Section V, Article 2  
Technical Proposal  
Criteria**

**3. COMPANY PROFILE/CONTRACTOR  
QUALIFICATION:**

- Company Profile/Contractor Qualification:  
Complete the Company Profile/Contractor Qualification Form in its entirety found in Appendix A.

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**Section IV, Article 2  
INITIAL PROPOSAL EVALUATION**

- Technical Proposals will be evaluated by a University Evaluation Committee for each roofing category.
- A score of 75% or better of the available technical points (for each category of roofing) must be achieved in order for a proposer to advance to the Interview Session phase
- Proposers may be shortlisted for one, two, or all categories of on call roofing types.
- Only those firms that are short-listed will advance/continue in this procurement process.

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**Section IV, Article 3  
Interview Sessions**

- Will be held only with the Shortlisted Firms
- **Required Attendees:** Proposed Project Manager, two (2) of the three proposed Field Superintendents, and one (1) of the three proposed Roofing Supervisors/Project Leads.
- **Purpose:**
  1. to allow the University to meet the Proposer's key personnel and provide them an opportunity to convey their background and expertise as it applies to the University's project;
  2. to discuss selected categories of the Proposer's Technical Proposal;
  3. to provide an opportunity to clarify and discuss the scope of services for this On Call Roofing Contract; and,
  4. to review the Price Proposal form.

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**Section IV, Article 3  
Second Phase Technical  
Evaluation**

- Second Phase Technical Evaluation will be conducted following the Interview Sessions.
- Order of Importance of Technical Criteria remains the same.
- All technical criteria will be re-evaluated based on the Interviews.
- Key Personnel and Firm References will be included.
- Proposers must maintain 75% or better of the available technical scores (for all roofing categories for which they are proposing) to advance in the procurement.
- May be shortlisted for one, two, or all roofing categories.

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**Section IV, Article 4  
Price Proposal**

- Price Proposals will only be requested of those proposers who remain shortlisted following the Second Technical Evaluation.
- Price Proposals for On Call Maintenance and Repair AND Slate Roofing Repair/Replacement will consist of:
  - Hourly Rates for Key Personnel/Additional Staff positions;
  - Percent (%) Mark-up for:
    - Materials
    - Equipment Rental
    - Subcontractors
- Price Proposals for Commons Roof Replacement (Lump sum price based on 100% documents issued to shortlisted firms for Roof Replacement category (who are certified by the specified roof manufacturer(s); may also include alternates and/or allowances)

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**Section IV, Article 4  
Price Proposal**

- Shortlisted firms proposing on the Roof Replacement Projects, MUST also include:
  - MBE Attachment 2 – MBE Subcontractor Schedule – **THIS MUST BE INCLUDED**
  - 5% Bid Bond

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**Section IV, Article 4  
Price Proposal Evaluation**

- Price Proposals will be evaluated based on:
  - Sample projects for the categories of 1) On Call Repair/Maintenance, and, 2) On Call Slate Roofing Repair/Replacement;
  - Lump Sum total for the UMBC Commons Project including allowances and/or alternates as may be applicable
- Price proposals are not opened publicly.
- The University may elect to request Best & Final Price Proposal(s).

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**Section IV, Article 5  
Final Evaluation**

- Ranking of the Price Proposal for each roofing category will be combined with the corresponding total technical ranking for each roofing category to determine a final rating for each proposal for each roofing category.
- Technical merit will have a greater weight than price.
- The University will choose from among the highest rated proposals those proposals for each category of roofing which will best serve the interests of the University in accordance with USM procurement policies and procedures.
- The award of the UMBC Commons Roof Replacement Project will be made to the most advantageous proposal amongst those proposers who are awarded on call 'master' contracts for roof replacement.

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**RFP Questions**

- Questions from this pre-proposal meeting as well as questions submitted subsequently will be included in an issued addendum.
- All questions must be sent to John Kenny with a copy to Valerie Rolandelli as indicated in the RFP. Proposers are not to contact anyone else outside of UMBC Procurement about this procurement.
- Firms must provide their contact information to Procurement so that any addenda are provided to them.

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**Question/Answer Period**

Any questions?

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