UMBC INTERDISCIPLINARY LIFE SCIENCES BUILDING

CMAR SOLICITATION – RFP-#BC-20942-C
PRE-PROPOSAL MEETING
AND
SITE VISIT

31 OCTOBER 14
CMAR Solicitation #RFP-20942-C

CMAR SOLICITATION SCHEDULE
<table>
<thead>
<tr>
<th>EVENT/ACTIVITY</th>
<th>DAY/DATE</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deadlines for Questions</td>
<td>Friday, 11/07/14</td>
<td>Sent to <a href="mailto:tcook@umbc.edu">tcook@umbc.edu</a></td>
</tr>
<tr>
<td>Responses to Questions</td>
<td>By Wednesday, 11/12/14</td>
<td>Issued via addendum.</td>
</tr>
<tr>
<td>Technical Proposal</td>
<td>Monday, 11/17/14, on or before 4:00 p.m.</td>
<td>Submitted to the Issuing Office – UMBC OFFICE OF PROCUREMENT - #301 of UMBC Administration Building</td>
</tr>
<tr>
<td>Discussion/Interview Session</td>
<td>Friday, 01/16/15, at 8:30 a.m. – 5:00 p.m.</td>
<td>Proposers are advised to set this date aside to avoid any conflicts</td>
</tr>
<tr>
<td><strong>Discussion/Interview Session with shortlisted firms only</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Price Proposal (anticipated date/time)</td>
<td>Tuesday, 02/03/15, on or before 4:00 p.m.</td>
<td>Submitted to the Issuing Office (as noted above)</td>
</tr>
<tr>
<td>BPW Meeting</td>
<td>March 2015</td>
<td>Actual date is dependent on BPW schedule, once published</td>
</tr>
</tbody>
</table>
CMAR Solicitation RFP #BC-20942-C

REVIEW OF CMAR RFP

REQUEST
RFP
FOR PROPOSALS
Section 00100
Instructions to Proposers

- The CMAR firm will provide pre-construction and construction services on this UMBC project.

- The initial contract will be issued for pre-construction services only with subsequent amendment(s) anticipated for the construction of the project.

- Early trade packages, if any, will be determined by the Project Team.
Section 00100
Instructions to Proposers

• Issuing Office is UMBC’s Office of Procurement Services and is the sole point of contact.

• All questions are to be directed to Terry Cook at tcook@umbc.edu.

• Responses to questions will be provided via addendum and posted on UMBC ebid board http://www.umbc.edu/adminaffairs/procurement/EBidB.shtml.
Section 00100
Instructions to Proposers

• Late proposals (technical and/or price) cannot be accepted.

• Proposals must be delivered to UMBC’s Procurement Office located in Suite #301 of the UMBC Administration Building.

• Bid bond is required to be submitted with the Price Proposal.
Section 00100
Instructions to Proposers

- Pre-construction phase CM fee in the price proposal is valid for 120 days.

- The Construction phase CM fee in the price proposal shall remain irrevocable until acceptance of each GMP and approval of the associated contract amendment.
Section 00100
Instructions to Proposers

• MBE participation level for this solicitation is 29%.

• The MBE sub-goals total 13% with:

<table>
<thead>
<tr>
<th>MBE Category</th>
<th>Sub-goal %</th>
</tr>
</thead>
<tbody>
<tr>
<td>African-American Owned</td>
<td>7%</td>
</tr>
<tr>
<td>Asian American Owned</td>
<td>4%</td>
</tr>
<tr>
<td>Any MBE category</td>
<td>2%</td>
</tr>
<tr>
<td>Total</td>
<td>13%</td>
</tr>
</tbody>
</table>

• Only MDOT MBE certification is accepted.
Section 00100
Instructions to Proposers

• If MBE is the prime or a participant in a joint venture, work performed by MBE with its own forces can be counted towards the MBE goal.

• Up to 50% of the MBE participation goal (overall) and up to 100% of not more than 1 of the MBE sub-goals.

• MBE prime must list its firm in Section 4A of the MBE Participation Schedule (Form 1-1A that must be included with the technical proposal).

• The remainder of the MBE goal must be met with other MBE firms.
Section 00100
Instructions to Proposers

• By submitting a proposal, proposing firms are committing to the 29% MBE participation level.

• MBE Attachment 1-1A MUST be submitted with the Technical Proposal.

• If 1-1A is not included, the proposing firm will be deemed “non-responsive and not susceptible for the award” – this is not curable.
Section 00100
Instructions to Proposers

• Confidential/Proprietary Information – Proposers are to identify those portions of their proposal which they deem confidential, proprietary, or trade secrets.

• It is not sufficient to preface the entire proposal with a proprietary statement.
Section 00200
Information Available to Propose

• Solicitation document #BC-20942-C, any addenda and responses to questions;

• The UMBC ILSB Facility Program dated 3/28/12; and,


• Solicitation documents are available on the UMBC ebid Board.
Section 00300
Proposals, Evaluation and Forms

• **Technical Proposals**: Submitted to UMBC’s Office of Procurement Services.

• An original, two (2) hard copies and six (6) sets of CDs or flash drives (for a total of 3 hard sets and 6 CDs or flash drives)

• Note: Only Technical Proposals requested at this time.
Section 00300
Proposals, Evaluation and Forms

• **Discussion/Interview Sessions** with proposers who are short listed as a result of the evaluation of the technical proposals.

• **Price Proposals** will be requested from proposing firms who are short listed as a result of the second phase evaluation after the discussion/interview sessions.
Section 00300
Proposals, Evaluation and Forms

• BPW approval anticipated in March 2015.

• Contract start date is anticipated to be on or about April 1, 2015.

• Groundbreaking on this project is anticipated in March 2017.
CMAR Solicitation #BC-20942-C

TECHNICAL PROPOSAL SUBMITTAL
Technical Proposal Submittal – PCC and Schedule

• Within the technical proposal, Proposers must either agree with or take exception to:

  – The Project Construction Costs (PCC) of $87,000,000; and,

  – Project Schedule - 48 months (of which 24 months for design inclusive of 4 months for bidding and 24 months for construction).
Technical Proposal Submittal – PCC and Schedule

• The University considers the project to be feasible at the Project Construction Costs and Project Time Frames.

• The University may disallow any change to either of them.
Technical Proposal Submittal - PCC and Schedule

• Proposers wishing to argue for higher costs or adjusted time frames must do so in their technical proposal with sufficient evidence/documentation to support their argument.

• The University will make the final determination and notify all proposers if there are any changes via addendum.
1. CM Team Organization

1.1 Organizational Chart of the Proposed CM Team

- Proposing Firm Name and CM Team Organizational and Reporting Structure.
- Must include the (1) Project Executive, (2) Senior Project Manager, (3) Project Manager, (4) Field Superintendent, (5) Chief Estimator and (6) BIM Manager.
- May include Other Key People as determined by the Proposing firm; and,
- Key Person’s Name and Project Role.
Technical Proposal Submittal –

1. CM Team Organization

1.2 Basis for Selection Form – Completed Form

1.3 Working Relationships Form – Completed Form

Higher consideration will be given based on the extent to which the key personnel have previously worked together on successfully completed projects, particularly if similar to the UMBC project.
Technical Proposal Submittal
1. CM Team Organization

1.4 **CM Key Personnel:** Provide completed Key Personnel Forms for the following positions:

- Project Executive
- Senior Project Manager (full time during construction)
- Project Manager (full time during design & construction)
- Field Superintendent (full time during construction)
- Chief Estimator
- BIM Manager

Note: See solicitation document for applicable definitions of these positions. By submitting these names, the proposer is committing these people to this project if the awarded CMAR firm.
Technical Proposal Submittal –
1. CM Team Organization

1.4 CM Key Personnel References:

- Include 3 references for each of the six (6) key personnel.

- References are to be from different projects; a minimum of one reference per person must be from outside of UMBC.

Note: All references will be held in the strictest of confidence and the University reserves the right to verify all information and check any other sources available.
Technical Proposal Submittal – 1. CM Team Organization

1.5 **Matrix of Anticipated Total Hours:** Complete this form for all on-site CM staff during construction (2080 hours = 1 year)

1.6 **Matrix of CMAR Services:** Complete this form to indicate primary responsibility (1), secondary (2) and participating (P).

Only one person is to be listed as having primary responsibility for each service.
2.1 **Design Assist**: Provide preliminary recommendations on design-assist trades inclusive of the basis for the recommendations.

2.2 **Project Specific Background**: Provide summary information on the proposer’s specific background in doing a CMAR project such as the UMBC project including, *but not limited to*, the items noted in the RFP.
2.3  **Pre-construction Services:** Provide examples of:

- 100% DD estimate;
- Design Review/Constructability Review Report;
- Value Engineering Report; and,
- Design-assist solicitation document. *(See Addendum #1 for update on this document.)*

**Notes:**

- These documents MUST be from one (1) single project.
- Higher consideration given if they are from one of the projects submitted under Firm Experience (#3).
2.4 **Project Challenge:**

- Select one (1) aspect that your team finds the most challenging.
- Provide description of the challenge and reason for selection.
- Provide description of how your team would address it inclusive of your recommendations.
3.1 **CM Firm Experience:**

- Complete the CM Firm Experience form on **three (3) projects** that meet the specific criteria in the solicitation documents.

  Note: If joint venture, see RFP for specific information on firm experience.

- All projects must have been done by the Proposing firm.
## 3.1 Firm Experience

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Requirements</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Status</td>
<td>1 project substantially complete</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2 projects at least 50% complete for construction</td>
<td></td>
</tr>
<tr>
<td>Delivery Method</td>
<td>2 CMAR</td>
<td>3rd project cannot be CM Agent. See RFP for definition of CMAR.</td>
</tr>
<tr>
<td>Construction Costs</td>
<td>1 - &gt;$65M</td>
<td>See RFP - escalation factor calculated from mid-point of construction</td>
</tr>
<tr>
<td></td>
<td>2 - &gt; $40M</td>
<td></td>
</tr>
<tr>
<td>Project Type</td>
<td>3 – new*</td>
<td>*See RFP re: additions</td>
</tr>
<tr>
<td></td>
<td>1- higher ed research facility</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1- higher ed teaching facility</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1- includes vivarium</td>
<td></td>
</tr>
<tr>
<td>Project Photo</td>
<td>Include for each project (color desirable)</td>
<td></td>
</tr>
<tr>
<td>Consideration Factors</td>
<td>See RFP for these details</td>
<td></td>
</tr>
</tbody>
</table>
Technical Proposal Submittal –
3.2 CM Firm References

- Provide a reference with each project on the CM firm experience form.
- Reference contact must be from the project owner’s organization.
- The University reserves the right to check any other sources available.
- Provide two additional project references with a list of applicable project(s) and brief description(s).
- Additional references will only be used if UMBC unable to contact one or more the 3 references from the submitted projects.
• All reference checking will be conducted as part of the second phase technical evaluation.

• However, all proposers must furnish this information in their technical proposals.

• Ensure that the reference can speak to the firm or key person’s performance.

• All references will be held in the strictest of confidence.
4. Profile of Proposer

4.1 Company Background:

• Provide a brief but *informative history* of your firm. See RFP document for specific information to be included.

• If joint venture, see RFP for specific notes.

• Provide financial information – D&B report with rating or most recent financial statement (higher consideration)

*Only* one (1) set of the financial information is required in a separate envelope with the “original” set of the technical proposal.

Highest consideration if *audited* financial statements are submitted
Technical Proposal Submittal –
4. Profile of Proposer

4.2 Annual Sales Volume/Completed Projects: Complete this form for the last 4 years (2010-2013).

4.3 Current Workload: Complete this form to list the current projects on which your firm is committed with the specific information to be provided.

Include statement on your firm’s ability to perform under the CMAR contract with this workload (in space provided).

Notes: This information is to be about the responsible office only that will be directly handling this project. See RFP for notes on joint venture proposers.
4.4 Experience Modifier Ratio (EMR):

- Provide your firm’s EMR

- For the last three (3) years (2011, 2012 and 2013).
Technical Proposal Submittal –
5. Economic Benefit

• Provide a description of how the award of this contract to your firm will benefit the economy of Maryland.

• See the RFP for specific information to be provided inclusive of dollar/job projections.
Technical Proposal Submittal

Other Documents to be included:

• Contractor’s License (photocopy);

• Bid/Proposal Affidavit (completed and signed);

• MBE Attachment 1-1A*; and,

• Acknowledgement of Receipt of Addendum.

*Note: MBE Attachment 1-1A Form **MUST** be included.
CMAR Solicitation #BC-20942-C

DISCUSSION/INTERVIEW SESSION
Discussion/Interview Sessions-Purpose

• Allow the University to meet the CM’s key personnel.

• Allow the Proposer to present and discuss its project challenge.

• Allow the Proposer to present its preliminary thoughts on design-assist subcontractors for this project.
Discussion/Interview Sessions-Purpose

- Discuss other elements/categories of the Technical Proposal.
- Provide opportunity to discuss/clarify the CMAR scope of services.
- Review the Price Proposal form.
Discussion/Interview Session

• Key personnel *required* to attend:
  1. Project Executive
  2. Senior Project Manager
  3. Project Manager
  4. Field Superintendent
  5. Chief Estimator

Other personnel are at the discretion of the CM firm but must be participants in the session

• Sessions will be 1-hour in duration and UMBC will confirm specifics of these sessions in writing.
Discussion/Interview Session

• Sessions scheduled for 01/16/15 so proposers are advised to set this date aside.

• Forum will be informal. The University is not interested in a marketing presentation.

• Requesting round table discussions with short listed CMAR firms.
Price Proposal Submittal – CM Pre-construction Fixed Fee

• The quoted fee is an all-inclusive, lump sum fee for the provision of the required services with complete breakdown.

• To include pre-construction allowances (per the RFP).

• The allowances are set up by UMBC and UMBC is responsible to replenish these, if necessary.

However, no allowance funds are to be expended without the prior written approval of the University’s PM. Any unused allowance funds revert to UMBC.
Price Proposal Submittal – CM Construction Fixed Fee

• Quoted all-inclusive lump sum fee. See RFP document for specifics on what is included and not included in this quoted fee.

• There will not be any adjustments made to the CM construction fee no matter the scope changes unless UMBC, in its sole discretion, finds the magnitude of the change warrants consideration of an adjustment; see RFP for further details on this.

• There is NO mark-up by the CM of any kind on any change order work.
Price Proposal Submittal-
CM Reimbursable Costs/NTE

• CM On Site Staff Costs (see list of applicable positions) with completed breakdown attachment and quoted hourly billing rates to be provided inclusive of the allowances for Building Commissioning Agent during construction and FFE Engineer.

• Quoted on a not-to-exceed (NTE) basis.

• All CM positions not included on this list of on-site staff positions must be included in the CM Construction Phase fee.

• Senior Project Manager and Project Manager are salaried positions with maximum reimbursement of 40 hours/week
Price Proposal Submittal – CM Reimbursable Costs/NTE

• General Conditions Non-personnel Items including the allowances for third party testing and inspection as well as Exact Built documents with completed breakdown attachment. [Note: Two (2) Offices in CM trailer are to be provided for AE and University.]

• Quoted NTE must be a minimum of 4.5% of Project Construction Costs (PCC) (after insurance, bond and allowance costs).

• The CM is not to expect that any change order will allow for an increase in General Conditions costs. Such requests will be handled on a case by case basis.
Price Proposal Submittal – CM Reimbursable Costs/NTE

- **CM-GMP Contingency** – must be minimum of 1.5% of the Project Construction Costs ($87M).

- There will not be any adjustment made to the CM-GMP contingency no matter the project scope changes *unless* UMBC, in its sole discretion, finds the magnitude and/or nature of the change warrants consideration of additional contingency; see RFP for further details on this.
Price Proposal Submittal – General Notes

• An original and one (1) copy of the Price Proposal are to be submitted.

• The Price Proposal shall be filled out completely in ink or typed.

• Any erasures and/or alterations to the pricing shall be initialed by the signer.

• Changes, alterations and additions to the Price Proposal form are NOT allowed.

• A Bid Bond on the University form is to be included.
CMAR Solicitation #BC-20942-C

EVALUATION PROCESS
Evaluation Process

• Conducted by a University Evaluation Committee.

• Initial technical evaluation will be based on the technical proposals. The order of importance of the technical criteria is noted in Section 00300.

• Based on the results of this initial evaluation, the University will develop a short list of proposers.

• All proposers will be advised of the outcome of this initial evaluation.
Evaluation Process

• Short listed proposers will be asked to attend the Discussion/Interview Sessions.

• Following these sessions, a Second Phase Technical Evaluation will be conducted.

• All information provided by the Proposer in the technical proposal and the Discussion/Interview session will be re-evaluated.

• A second short list of proposers will result from this evaluation.
Evaluation Process

• Further information may be requested by UMBC during the technical evaluation process.

• UMBC may elect to conduct a Best & Final Technical phase.

• Proposers who remain short listed will be asked to submit a Price Proposal.
Evaluation Process

- Price proposals will not be opened publicly.
- Price proposals will be evaluated based on the sum total price.
- UMBC may elect to request a Best & Final Price Proposal(s).
Evaluation Process

• The final proposal rating will be based on the combined evaluation of the Technical Proposal, Discussion/Interview Session and the Price Proposal.

• Technical merit will have a much greater weight than cost.

• The University will choose from among the highest rated proposals that proposal that will best serve its interest in accordance with USM procurement policies.
CMAR Solicitation #BC-20942-C

CONTRACT AWARD
Contract Award

• The successful CMAR firm will be required to sign the University’s contract prior to BPW.

• The initial contract will be for pre-construction services only.

• Upon approval by the Board of Public Works, the University will fully execute the contract.

• The University anticipates submitting the contract for a BPW meeting in March 2015.
CMAR Solicitation #BC-20942-C

CMAR SCOPE OF SERVICES
Section 00400 - CMAR Scope of Work
Pre-construction CM Services

• Provision of requested **pre-construction CM services** inclusive of the submission of a Guaranteed Maximum Price (GMP) to construct the project within the PCC Costs of $87,000,000 and the specified 24 months for construction, as approved by UMBC.

• Pre-construction services include the following: Project review and consultation, VE, scheduling, constructability review, cost estimating, design-assist subcontracting and FFE and trade bidding/GMP submittal. (See RFP for full details.)
Section 00400 - CMAR Scope of Work
CM Preconstruction Services – Design-Assist

• The CM will be responsible to handle the solicitation and award of any Design-Assist contracts.

• Initial D-A awards are for pre-construction services only with the associated costs handled under the D-A allowance.

• The CM will be responsible to oversee and manage these D-A subcontractors with the associated costs included in the CM pre-construction fee (not the FFE allowance).

• The University may, at its sole discretion and without penalty, have the CM discontinue with a D-A subcontractor prior to the construction award.
Section 00400 - CMAR Scope of Work
CM Pre-construction Services – FFE

• The AE will be responsible for designing/specifying all furniture, fixtures and equipment (FFE).

• The CM will be responsible to procure the following FFE: AV and multi-media equipment; and, built-in research equipment such as fume hoods, biosafety cabinets and environmental boxes.

• The CM will submit separate FFE GMPs or include FFE in the Construction GMP(s), as determined between the CM and the University.
Section 00400 - CMAR Scope of Work
CM Construction Services

• Provision of **construction CM services** to complete the project within the approved GMP(s) and project schedule.

• CM construction services include: Project control (staffing, on site management, meetings, RFIs, substitution requests, project photos), shop drawings/submittals processing, scheduling, cost control, quality assurance, commissioning, FFE services, project safety and close out. (See RFP for full details.)
Section 00400 - CMAR Scope of Work
CM Construction Services – FFE Services

• The CM shall expedite delivery, receive, coordinate, schedule and oversee the installation of all FFE items which the CM has procured.

• The CM shall receive, coordinate, schedule and oversee the installation of all furniture and common lab equipment such as autoclaves, incubators, refrigerators, steam generators, etc. which are procured by the University.

• A FFE Engineer has been added to the On-Site staff positions for this purpose under a University allowance.
Section 00400 - CMAR Scope of Work
CM Construction Services – QC Manager

• Additional on-site staff position of Quality Control Manager (see RFP for specific duties of this position).

• Person shall have not less than 10-years combined experience as superintendent, project manager, or approved comparable position managing and executing quality-assurance and quality-control procedures.

• Individual shall have experience in areas of hazard identification and safety compliance.

• The QC Manager may not also serve as Senior Project Manager, Project Manager or Field Superintendent.
Procurement Overview
CMAR Solicitation – RFP #BC-20942-C
PROJECT OVERVIEW
Interdisciplinary Life Sciences Building
CMAR Pre-proposal Meeting – Project Overview

View from the north

View from the south-west

Proposed project boundaries
The new UMBC Interdisciplinary Life Sciences Building (ILSB) is programmed to be approximately 131,000 GSF/70,690 NASF.

The purpose of the new facility is to provide flexible and adaptable research and teaching/educational spaces.
New state-of-the-art facility to provide:

- **Classrooms, teaching labs, study rooms** and associated support space
- **Shared, flexible and adaptable research labs** with associated support spaces
- **Core research facilities** including an AAALAC accredited vivarium and bioprocess and cell science lab
- **Center for Interdisciplinary Research and Consulting office.**
# PROGRAM SUMMARY

<table>
<thead>
<tr>
<th>Program Element</th>
<th>NASF Total</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Teaching Facilities</strong> inclusive of classrooms, teaching labs, study rooms with associated support spaces**</td>
<td>25,570</td>
<td>36%</td>
</tr>
<tr>
<td>Interdisciplinary <strong>Research Lab Facilities</strong></td>
<td>34,685</td>
<td>49%</td>
</tr>
<tr>
<td><strong>Shared Core Research Facilities</strong></td>
<td>8,710</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Building Support</strong></td>
<td>1,725</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>70,690</td>
<td>100%</td>
</tr>
</tbody>
</table>
PROJECT BOUNDARIES

• The footprint of the Theater/Academic Services Building.

• The area of the open quadrangle to the west of the building.

• The plaza to the north with vehicular access to the site from Commons Drive to the southeast.

• Encompasses the Central Plant, the access stairs between Biological Sciences and the Math/Psychology buildings, the outflow area to the south of the garage and a ribbon of land to the north of the garage extending to Hilltop Circle.
PROJECT GOALS

• Enhancement and expansion of life sciences programs and teaching facilities;

• Address shortages in teaching and research space;

• Advancement of retention and recruitment of top quality students and faculty; and

• Relocation of core facilities from existing deficient spaces and creation of new facilities to support campus research and teaching.
PROJECT BIM APPROACH

- This project will use BIM technologies and workflow to achieve the following goals:
  - High performance building using sustainable design concepts;
  - Collaborative project environment;
  - Coordinated project documents
  - System coordination to streamline construction processes and minimize change order;
  - Use BIM as an information & communication tool with the campus community
  - Simulate the planning sequence of construction activities and space requirements
  - Incorporate record document BIMs into UMBC GIS.

- A BIM execution plan will be developed by the Project Team (University, AE & CMAR):
PROJECT OVERVIEW

QUESTIONS
Interdisciplinary Life Sciences Building
CMAR Pre-proposal Meeting – Site Visit
UMBC INTERDISCIPLINARY LIFE SCIENCES BUILDING PROJECT

CMAR SOLICITATION – RFP #BC-20942-C

PRE-PROPOSAL MEETING
AND
SITE VISIT

31 OCTOBER 14