

**SOLICITATION BC-21116-M**  
**FACILITIES AND ADMINISTRATIVE RATE PROPOSAL CONSULTANT**  
**October 25, 2018**

**SCOPE OF SERVICES**

**DESCRIPTION:** The University of Maryland, Baltimore County (UMBC) seeks proposals from qualified consultants to assist the University in the preparation of the Facilities & Administrative Rate proposal.

**UMBC BACKGROUND:** Established in 1966, the University of Maryland, Baltimore County (UMBC) is one of twelve universities that along with two regional centers and one system office constitute the University System of Maryland. The campus houses over 4.7 million gross square feet (GSF) of built space on 512 acres.

UMBC is a dynamic public research university integrating teaching, research and service to benefit the citizens of Maryland. As an Honors University, the campus offers academically talented students a strong undergraduate liberal arts foundation that prepares them for graduate and professional study, entry into the workforce, and community service and leadership. UMBC emphasizes science, engineering, information technology, human services and public policy at the graduate level. UMBC contributes to the economic development of the State and the region through entrepreneurial initiatives, workforce training, K-16 partnerships, and technology commercialization in collaboration with public agencies and the corporate community. UMBC is dedicated to cultural and ethnic diversity, social responsibility and lifelong learning.

In Fall 2017, the university enrolled 13,662 students of which 2,428 are graduate students. In addition, there were 697 full-time and 322 part-time faculty; 1,275 full-time and 42 part-time staff; 596 Graduate Research Assistants; and 613 personnel graduate assistants. The campus (excluding bwtech@UMBC and the three parking garages) houses 3.5 million gross square feet (GSF) of built space on 512 acres.

Nearly seven percent of assignable space is dedicated to research laboratory facilities, a reflection of UMBC's classification by the Carnegie Foundation as a Doctoral University – Higher Research Activity. UMBC is generally recognized as among the fastest growing research universities in the nation. Annual extramural research expenditures in FY2017 were \$78.5 million, a remarkable growth from only \$20 million in 1996. These overall expenditures include \$45.8 million provided by federal funded programs.

UMBC's key research strengths include environmental sciences, high-performance computation, life sciences, health sciences, public policy and social sciences. In most fields, conducting and publishing research is a requirement for tenured faculty. Students often participate as research assistants to gain hands-on experience and apply knowledge learned in the classroom to their field. Offering opportunities for students to participate in research provides them with the experience, skills and confidence that puts them at a competitive advantage when entering the workplace.

**WORK TO BE PERFORMED:** The work to be performed under this solicitation shall consist of the following:

- 1. Space Survey:** The Consultant shall assist UMBC personnel in the selection of the rooms to be surveyed as well as the development of the timeline for the space survey procedures. The Consultant shall also develop training documents, conduct on-site training, and transmit surveys to the departments, as well as interview and assist key departments in the completion of the surveys following the space survey training. The Consultant shall perform periodic reviews of the quality of the space survey results during the data gathering phase, and recommend adjustments as required. The Consultant shall also conduct general reviews of UMBC space after completion of data gathering, and migrate the data into the Consultant's space survey system. Finally, the Consultant shall perform a standard "base / space" analysis and any other required tests of the University provided space files to ensure that all necessary data fields are populated.
- 2. F&A Rate Calculation:** The Consultant shall assist UMBC personnel in the calculation of the Facilities & Administrative rate. The rate calculation will be based upon fiscal year 2019 data following the appropriate guidelines and be sensitive to the treatment of unallowable costs, cost sharing, departmental administration, and other items of risk.
- 3. F&A Rate Proposal:** The Consultant shall assist UMBC personnel in the preparation of the Facilities & Administrative Rate proposal. The proposal shall be prepared in compliance with 2 CFR 200.57 standard format and contain all supporting documents required by the Department of Health & Human Services (DHHS) Cost Allocation Services (CAS).
- 4. Cost Accounting Disclosure Statement (DS2):** The Consultant shall conduct a review of the current DS2 Statement and assist UMBC personnel in updating the statement as required.
- 5. F&A Rate Strategy:** The Consultant shall develop a strategy for the Facilities & Administrative Rate negotiations with CAS. The strategy shall provide a requested F&A rate that is favorable to both the University and CAS, and acceptable for at least a three (3) year period.
- 6. Rate Negotiations Assistance:** The Consultant shall assist in the rate negotiations with CAS. This effort shall include working with UMBC to respond to all questions and providing additional data as requested from CAS during the standard negotiations.

**PROJECT SCHEDULE:** The schedule for the UMBC F&A rate proposal process is as follows:

- 1. Initial phase:** The initial phase includes the work required for the space survey, the rate calculation, the rate proposal, and the rate strategy as described above. This phase of work is to be completed by December 31, 2019 with submission of UMBC's F&A rate proposal.

2. Waiting Period: After the submission of UMBC's F&A rate proposal, it is anticipated that there will be a three (3) month waiting period during which no services will be required from the Consultant. However, the timeframe for the actual waiting period will be determined by DCA.
3. Final phase: During the final phase of the project, the Consultant shall provide assistance to UMBC during the rate negotiations with DCA. It is anticipated that this phase shall be approximately six (6) months in duration.

**CONTRACT TERM:** Contract is to be issued for a period of two (2) years from date of award. There will be one (1) one-year renewal option solely at the University's option.

**AWARD:** It is the University's intent to award a single contract. This study is to be performed for a fixed rate fee. UMBC will not pay in advance for any services, however, it may consider progress payments as milestones are met and deliverables are approved by UMBC.

### **FIRM'S RESPONSE REQUIREMENTS**

Firms shall submit the following information:

1. A cover letter signed by an officer or member authorized to bind the firm to the proposed fees, rates, and terms. The cover letter shall include the name, address, phone number, and email address for the contact for the solicitation.
2. Summary of the qualifications and experience of the firm. Provide brief narrative describing your firm's experience providing assistance with developing Facilities & Administrative Cost rates for Higher Education institutions. Provide brief narrative describing your firm's experience assessing the space as a component of the F&A cost calculation. Provide information for at least three (3) F&A rate cost proposals that have been performed with a similar scope. Describe the scope of work that was performed, the dates of the work, and the assistance that were provided to the institution. Include information to indicate whether the rate calculation was subsequently approved and the actual approved rate as compared to the rate that had been provided in the proposal. Provide contact information for each of these Institutions including the name of the Institution, contact name, contact phone number, and contact email address. References may be contacted at any time during this process to determine an offeror's responsibility.
3. Lead consultant/Key staff. Provide a resume for the lead consultant and, if applicable, any other key staff proposed, detailing qualifications and experience suitable for the project and describing how the Offeror's team will interface with UMBC.

4. Workplan/Timeline. Provide information regarding the approach that the firm will take and the tools to be utilized to perform the scope of work. Provide a recommended schedule/level of effort for the engagement. The schedule/level of effort should be resource loaded so that UMBC is able to understand the anticipated level of effort for each member of the Offeror's team, as well as the required level of effort for UMBC staff. Include a timeline to accomplish the work as well as narrative indicating whether the timeframe in the proposed UMBC schedule is a sufficient amount of time for this project.
5. Subconsultants/Partners. There may be areas for use of subconsultants or partners in this Project. UMBC encourages the use of small businesses and MBE firm whenever possible. If a firm is utilizing a subconsultant or partner, the firm shall list the subconsultant/partner, the area of expertise of the subconsultant/partner, and all other applicable information regarding key personnel for that firm.
6. Sample strategy. Provide a sample strategy demonstrating your firm's experience with F&A rate proposals. This sample may be one of the proposals described in the qualifications section. The strategy may be submitted as a separate document, but should clearly indicate the Offeror's name.

All responses shall be provided electronically by November 19, 2018 by 11:59 pm Eastern Time to: [Technic.3byytubcvz0qi5zp@u.box.com](mailto:Technic.3byytubcvz0qi5zp@u.box.com). Proposers should receive an automatically generated verification from Box when the file has successfully uploaded. Proposers that do not receive verification should immediately contact the Procurement office to confirm that their response has been received.

### **EVALUATION PROCESS**

Firms shall be shortlisted based on their proposal responses. Shortlisted firms may be required to attend an interview either in person or via Skype. These sessions are anticipated to be held on December 17, 2018. The Lead Consultant and Key Personnel are to set aside this date on their calendar to avoid conflicts.

Additionally, shortlisted firms shall provide a price proposal on December 20, 2018. This shall be a fixed fee for the engagement. There are no reimbursables under the resulting contract. The fee and hourly billing rate are to include all costs, including domestic travel, for the engagement.

If you have any questions regarding this solicitation, please contact Elizabeth Moss, Executive Director of Procurement and Strategic Sourcing at [emoss@umbc.edu](mailto:emoss@umbc.edu). It is preferable that questions be provided in writing via email for ease of distribution within UMBC. Responses shall be provided to all other proposers, but without identification of the inquiring firm. All questions shall be submitted by November 8, 2018 to allow for sufficient time to respond before proposals are due. To maintain the integrity of the procurement, Elizabeth Moss shall be the sole point of contact for this solicitation.