The purpose of this ADDENDUM NO. 1 is to distribute information in response to questions received from proposers as well as other revisions to the solicitation documents. All other specifications, terms and conditions of this solicitation not expressly amended by the responses in this ADDENDUM remain as originally stated. Please include the attached Addendum Acknowledgement Form in your firm’s technical proposal.

1. Proposer Questions:

1.1 Question: In the evaluation of relevant firm experience, are IPD projects an acceptable alternative to CMAR projects, given IPD focus on a collaborative approach and focus on preservation/enhancement of program?

UMBC Response: The University has determined that IPD projects are not an acceptable alternative to CMAR projects. Although the University acknowledges that the focus of both methods is similar, the roles and responsibilities are different and do not demonstrate the relevant firm experience required.

1.2 Question: Is it sufficient to submit a searchable PDF file instead of also submitting a word version of the document?

UMBC Response: Yes.

1.3 Question: Section 2.2 of the RFP provides an organizational format for the technical proposal. Section 2.3 – 2.8 seem to slightly deviate from the format list provided. Please confirm which format/order of sections should be followed for the technical submission.

UMBC Response: Please follow the category format provided through Section 2.3 – 2.8.

2. RFP Revisions:

2.1 Section 2.5 – Firm Relevant Experience, page 39, second paragraph: Delete “the last five (5) years” and replace with “the last eight (8) years”.

2. Pre-proposal Meeting: The power point presentation and sign-in sheet have been provided as an attachment to this addendum.

3. Acknowledgement of Addendum Form: The attached Acknowledgement of Receipt of Addendum form is to be completed/signed and included with the Technical Proposal.

END OF ADDENDUM #1 DATED 9/24/19

Attachment: Acknowledgement of Receipt of Addendum
Power point presentation
Pre-Proposal sign in sheet

This Addendum #1 on RFP #BC-21148-M and its attachment are posted on UMBC’s ebid Board at http://procurement.umbc.edu/bid-board/
RFP NO.: BC-21148-M

RFP FOR: UMBC ON CALL CMAR CONTRACT

TECHNICAL PROPOSAL DUE DATE: Tuesday, October 1, 2019 on or before 11:59 p.m.

NAME OF PROPOSER: ________________________________

ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

The undersigned, hereby acknowledges the receipt of the following addenda:

<table>
<thead>
<tr>
<th>Addendum No.</th>
<th></th>
<th>dated</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>9/24/19</td>
<td></td>
</tr>
<tr>
<td>______</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>______</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>______</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>______</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>______</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Signature ________________________

Printed Name ________________________

Title ______________________________

Date ______________________________
UMBC On-Call CMAR

RFP-#BC-21148-M

PRE-PROPOSAL MEETING

10 September 19
CMAR SOLICITATION SCHEDULE
# 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, 9/20/19</td>
<td>Sent to <a href="mailto:emoss@umbc.edu">emoss@umbc.edu</a></td>
</tr>
<tr>
<td>Responses to Questions</td>
<td>By Wednesday, 9/25/19</td>
<td>Issued via addendum.</td>
</tr>
<tr>
<td>Technical Proposal</td>
<td>Tuesday, 10/1/19, on or before 11:59 p.m.</td>
<td>Submitted to the Issuing Office via UMBC Box. Ensure that automatic confirmation of upload is received.</td>
</tr>
<tr>
<td>Discussion/Interview Session with shortlisted firms only</td>
<td>Tuesday, 10/29/19</td>
<td>Proposers are advised to set this date aside to avoid any conflicts.</td>
</tr>
<tr>
<td>Price Proposal  <em>(anticipated date/time)</em></td>
<td>Monday, 11/11/19, on or before 11:59 p.m.</td>
<td>Price proposals to be submitted via UMBC Box</td>
</tr>
<tr>
<td>Contract Award for Maintenance Projects</td>
<td></td>
<td>In place by December 1, 2019</td>
</tr>
<tr>
<td>Contract Award for Construction Projects</td>
<td></td>
<td>In place by January 1, 2019 following BPW approval</td>
</tr>
</tbody>
</table>
Contract Structure Overview

• Provide “on call” pre-construction and construction services for projects utilizing the Construction Management at Risk/Construction Management with Guaranteed Maximum Price project delivery method.

• Multiple awards will be made from this solicitation to establish two types of contracts with each successful CM firm.
  
  • One contract for projects categorized by the University as a maintenance project
  
  • One contract for projects categorized by the University as a construction contract
Contract Structure Overview

• Upon selection of CM firms, contracts will be executed for maintenance projects – December 1, 2019 anticipated date

• Upon selection of CM firms and approval of BPW, contracts will be executed for construction projects – January 1, 2020 anticipated date

• Estimated annual dollar volume for work is $7,000,000
  • Anticipated project size will range from $200K to $7M

• Initial term for three (3) years with two (2) three-year renewal options
Contract Process

Each project will be competed among all awarded CM firms and awarded on a task order by task order basis.

*Ad Hoc* services may be required to be performed for a project.

- Generally services needed during a preconstruction phase
- Awarded through selection of a particular firm based on expertise necessary for the project, on a rotation basis, or competed among contracted firms
Scope of Work

Work to be performed for task orders under these contracts shall be performed in accordance with the Division 01 requirements for the particular project.

• Pre-Construction/Design Phase - develop schedules, prepare construction cost models/estimates, conduct value engineering studies, study labor conditions, identify and address constructability issues, and advise on the sequencing of construction work.

• Construction Phase - provide services and manage the project (inclusive of the award and management of all trade contracts) in the areas of change order review, quality assurance/inspections, schedule maintenance, cost control, meetings, shop drawing review, processing/monitoring of RFIs and substitution requests and claims resolution, and coordination/communication of the activities of the Project Team.
MBE Participation

• A MBE participation goal is not set at the master on-call contract level.

• MBE participation level will be set at the task order level dependent on the scope of the work to be performed.

• MBE participation is encouraged for all work performed under this contract regardless of the goal that has been set.

• Only MDOT MBE certification is accepted.
TECHNICAL PROPOSAL SUBMITTAL
Technical Proposal Format

- **Technical Proposals**: Submitted to UMBC’s Department of Procurement & Strategic Sourcing via Box site.
  - One set in Microsoft Word format
  - One set in PDF format
- Note: Only Technical Proposals are requested at this time.
Technical Proposal Submittal – CM Team Organization

Organizational Chart of the Proposed CM Team

- Proposing Firm Name and CM Team Organizational and Reporting Structure.
- Must include the (1) Contract Coordinator, (2) two CM project managers, (3) three Field Superintendents, and (4) Chief Estimator.
- May include Other Key People as determined by the Proposing firm; and,
- Include Key Person’s Name and Project Role.

Basis for Selection Form – Completed Form
Technical Proposal Submittal
CM Team Organization

CM Key Personnel: Provide completed Key Personnel Forms for the following positions:
- two (2) CM Project Managers
- three (3) Field Superintendents

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

CM Key Personnel References:

– Include 3 references for each of the five (5) 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 –
Firm Experience/References

CM Firm Experience:

- Complete the CM Firm Experience form for each of 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.
## Technical Proposal Submittal – CM Firm Experience

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Requirements</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Status</td>
<td>Constructed in last (5) years or at least be substantially complete</td>
<td>In excess of $1 million in construction costs</td>
</tr>
<tr>
<td>Delivery Method</td>
<td>5 CMAR projects</td>
<td>Projects may not be CM Agent. See RFP for definition of CMAR.</td>
</tr>
<tr>
<td>Project Type</td>
<td>1 project must be a renovation in occupied setting</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 – 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 projects and brief descriptions.

• Additional references will only be used if UMBC unable to contact one or more the 3 references from the submitted projects.
Technical Proposal Submittal – References Notes

• 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.
Technical Proposal Submittal – Project Specific Background

Project Specific Background:

Provide summary information on the proposer’s specific background in doing CMAR projects such as the UMBC projects to be completed under this contract.
Technical Proposal Submittal- Project Specific Background

Pre-construction Services: Provide examples of:

- 100% DD estimate;
- Design Review/Constructability Review Report;
and
- Value Engineering Report.

Note: Higher consideration given if they are from one of the projects submitted under Firm Experience.
Technical Proposal Submittal – Profile of Proposer

Company Background:

• Provide a brief but *informative history* of your firm.

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

• Provide firm’s bonding capacity via written confirmation from firm’s bonding agent or bonding company.

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

Annual Sales Volume/Completed Projects: Complete this form for the last 4 years (2015-2018).

Note: This information is to be about the responsible office only that will be directly handling this contract.

Experience Modifier Ratio (EMR):
  • Provide your firm’s EMR
  • For the last three (3) years (2016, 2017, and 2018).
Technical Proposal Submittal

Other Documents to be included:

• Contractor’s license;
• Bid/Proposal Affidavit (completed and signed); and
• Acknowledgement of Receipt of Addendum.
INTERVIEW SESSION
Interview Session - Purpose

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

- Allow the Proposer to present and discuss background and expertise as it applies to this contract.

- Discuss other elements/categories of the Technical Proposal.

- Provide opportunity to discuss/clarify the CMAR scope of services.

- Review the Price Proposal form.
Interview Session

• Key personnel *required* to attend:
  1. Contract Coordinator
  2. 2 CM Project Managers
  3. Field Superintendents

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.
Interview Session

- Sessions scheduled for 10/29/19 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

Anticipated that the price proposal format will be hourly rates for key personnel

Price Proposal form will be issued to short listed firms at the appropriate time during the proposal process
CMAR Solicitation #BC-21148-M

EVALUATION PROCESS
Evaluation Process

• Conducted by a University Evaluation Committee.

• Initial technical evaluation will be based on the technical proposals.

• 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 Interview Sessions.

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

• All information provided by the Proposer in the technical proposal and at the Interview session will be evaluated.

• A second short list of proposers will result from this Second Phase 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 after the Second Phase Technical Evaluation will be asked to submit a Price Proposal.
Evaluation Process

• Price proposals will not be opened publicly.

• Price proposals will be evaluated based on sample projects.

• UMBC may elect to request a Best & Final Price Proposal.
Evaluation Process

• The final proposal rating will be based on the combined evaluation of the Technical Proposal, 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 those proposals that will best serve its interest in accordance with USM procurement policies.
Instructions to Proposers

• Issuing Office is UMBC’s Department of Procurement & Strategic Sourcing and is the sole point of contact.

• All questions are to be directed to Elizabeth Moss at emoss@umbc.edu.

• Responses to questions will be provided via addendum and posted on UMBC ebid board: https://procurement.umbc.edu/bid-board/.
Instructions to Proposers

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

• Proposals must be delivered to UMBC’s Procurement Office via Box. Proposers should receive an automatically generated verification from Box when the file has successfully uploaded.

Note: If a proposer does not receive this verification, contact the Issuing Office immediately.

• No bonds are required for the award of the On Call contract. However, the awarded firm for a particular task orders must furnish Performance and Payment bonds, each in the amount of 100% of the GMP, as required by the particular task order.
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.
Information Available to Proposers

- General conditions listing for non-personnel items
- University submittal/shop drawing flow chart
- UMBC Division 01 Requirements *(sample for illustrative purposes)*
- UMB Standard General Conditions of Construction Management, as modified by UMBC
UMBC ON-CALL CMAR

RFP #BC-21148-M

PRE-PROPOSAL MEETING

10 September 19
# PRE-PROPOSAL MEETING
UMBC ON CALL CMAR
SOLICITATION NUMBER: # BC-21148-M
DATE: Tuesday, September 10, 2019 at 3:00 pm

<table>
<thead>
<tr>
<th>Firm Representative</th>
<th>Firm Name</th>
<th>Phone Number</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dana Blackwood</td>
<td>Turner Construction</td>
<td>410-371-0940</td>
<td><a href="mailto:dbblackwood@tcco.com">dbblackwood@tcco.com</a></td>
</tr>
<tr>
<td>Dawn Fox</td>
<td>J. Vinton Schafer + Sons</td>
<td>410-335-3000</td>
<td><a href="mailto:dfox@guamdel.com">dfox@guamdel.com</a></td>
</tr>
<tr>
<td>woo Kang</td>
<td>Braunel Builders</td>
<td>410-666-2500</td>
<td><a href="mailto:winkang@braunel-builders.com">winkang@braunel-builders.com</a></td>
</tr>
<tr>
<td>Chuck Briney</td>
<td>Turner Construction</td>
<td>410-456-5677</td>
<td><a href="mailto:cbriney@tcco.com">cbriney@tcco.com</a></td>
</tr>
<tr>
<td>Daniel Moll</td>
<td>Veteran Design and Construction</td>
<td>413-543-5081</td>
<td><a href="mailto:dmoll@veteran-dci.com">dmoll@veteran-dci.com</a></td>
</tr>
<tr>
<td>Antoine Foy</td>
<td>Kim Engineering Inc.</td>
<td>413-8013551</td>
<td><a href="mailto:antoinef@kimengineering.com">antoinef@kimengineering.com</a></td>
</tr>
<tr>
<td>Curtis Dalsimer</td>
<td>Wohlsen Construction</td>
<td>410-678-3440</td>
<td><a href="mailto:cdalsimer@wohlsen.com">cdalsimer@wohlsen.com</a></td>
</tr>
<tr>
<td>Chelsea Newman</td>
<td>Lewis Contractors</td>
<td>410 350 4200</td>
<td><a href="mailto:cnewman@lewis-contractors.com">cnewman@lewis-contractors.com</a></td>
</tr>
<tr>
<td>Thomas Koen</td>
<td>PLANO COUPON</td>
<td>410 837 2570</td>
<td><a href="mailto:tkoen@plano-coupon.com">tkoen@plano-coupon.com</a></td>
</tr>
<tr>
<td>Tom Graw</td>
<td>J. Vinton Schafer</td>
<td>410-335-3000</td>
<td><a href="mailto:tgrau@guamdel.com">tgrau@guamdel.com</a></td>
</tr>
<tr>
<td>Gordon Shepard</td>
<td>Barton Malow</td>
<td>443-915-4241</td>
<td><a href="mailto:gordon.shepard@bartonmalow.com">gordon.shepard@bartonmalow.com</a></td>
</tr>
<tr>
<td>Firm Representative</td>
<td>Firm Name</td>
<td>Phone Number</td>
<td>Email Address</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------</td>
<td>------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>Doc Edr</td>
<td>OAK Contracting</td>
<td>410-285-1000</td>
<td><a href="mailto:doeder@oak-contracting.com">doeder@oak-contracting.com</a></td>
</tr>
<tr>
<td>Rob Tirocchi</td>
<td>Harkins</td>
<td>410-950-3939</td>
<td><a href="mailto:rtirocchi@harkinsbuilders.com">rtirocchi@harkinsbuilders.com</a></td>
</tr>
<tr>
<td>Gary Mackay Reid</td>
<td>David Fagan</td>
<td>240-730-7099</td>
<td><a href="mailto:dfagan@dmrc.cc.com">dfagan@dmrc.cc.com</a></td>
</tr>
<tr>
<td>Heather Rustici</td>
<td>JBC</td>
<td>410-334-5788</td>
<td><a href="mailto:hrustici@jbc.bz">hrustici@jbc.bz</a></td>
</tr>
<tr>
<td>Larry Hennessey</td>
<td>UMBC</td>
<td>410 455 1667</td>
<td><a href="mailto:lhennessey@umbc.edu">lhennessey@umbc.edu</a></td>
</tr>
<tr>
<td>Rafael Espinoza</td>
<td>UMBC</td>
<td>410-455-2071</td>
<td><a href="mailto:espinoza@umbc.edu">espinoza@umbc.edu</a></td>
</tr>
<tr>
<td>Joe Rexing</td>
<td>UMBC</td>
<td>410 455 3041</td>
<td><a href="mailto:jrexing@umbc.edu">jrexing@umbc.edu</a></td>
</tr>
<tr>
<td>Craig Goodwin</td>
<td>UMBC</td>
<td>443-939-2763</td>
<td><a href="mailto:cgoodwin@umbc.edu">cgoodwin@umbc.edu</a></td>
</tr>
<tr>
<td>Tom Oliver</td>
<td>DME</td>
<td>240 381 9385</td>
<td><a href="mailto:toliver@dmeconsulting.us.com">toliver@dmeconsulting.us.com</a></td>
</tr>
<tr>
<td>E. Raymond Moss</td>
<td>UMBC</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>