The purpose of this ADDENDUM NO. 1 dated May 12, 2020, is to distribute information in response to questions received from proposers as well as information provided during the pre-proposal meeting. **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. **Pre-proposal Meeting:**

   1.1 **PPT/Sign-in Sheet:** The (a) power point presentation and (b) sign-in sheet have been provided as attachments to this addendum.

   1.2 **Question:** In our interpretation of the RFP requirements, we believe that the Project Superintendent is to be a non-working superintendent. Is this a correct understanding of the RFP requirements?

      **UMBC Response:**
      Correct. The Project Superintendent is to be a non-working superintendent.

2. **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 5/12/20**

Attachments:

- Acknowledgement of Receipt of Addendum
- Pre-proposal Meeting PowerPoint
- Pre-proposal Meeting Sign-in Sheet

This Addendum #1 on RFP #BC-21194-C and its attachments are posted on UMBC's ebid Board at [http://procurement.umbc.edu/bid-board/](http://procurement.umbc.edu/bid-board/)
RFP NO.: BC-21194-C

RFP FOR: UMBC UTILITIES UPGRADES PHASE I

TECHNICAL PROPOSAL DUE DATE: Wednesday, May 27, 2020 on or before 11:59 pm.

NAME OF PROPOSER: ________________________________

ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

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

Addendum No. 1    dated May 12, 2020
Addendum No. _______ dated ________________
Addendum No. _______ dated ________________
Addendum No. _______ dated ________________
Addendum No. _______ dated ________________
Addendum No. _______ dated ________________

Signature __________________________________

Printed Name______________________________

Title_____________________________________

Date______________________________________
UMBC UTILITIES UPGRADES PHASE I PROJECT

PRIME CONTRACTOR
SOLICITATION – RFP-#BC-21194-C
PRE-PROPOSAL MEETING

MAY 11
Solicitation #RFP-21194-C

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>Tuesday, 5/19/20</td>
<td>Sent to <a href="mailto:emoss@umbc.edu">emoss@umbc.edu</a></td>
</tr>
<tr>
<td>Technical Proposal</td>
<td>Wednesday, 5/27/20, on or before 11:59 p.m.</td>
<td>Submitted to the Issuing Office to the UMBC Box address: <a href="mailto:Technic.Lr1ptnxkvv33g0vx@u.box.com">Technic.Lr1ptnxkvv33g0vx@u.box.com</a></td>
</tr>
<tr>
<td>Discussion/Interview Session with shortlisted firms only</td>
<td>Wednesday, 6/17/20</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>Thursday, 7/9/20, on or before 11:59 p.m.</td>
<td>Submitted to the Issuing Office to the UMBC Box address: <a href="mailto:Price_P.hj815nwulzplt0vz@u.box.com">Price_P.hj815nwulzplt0vz@u.box.com</a></td>
</tr>
<tr>
<td>Contract Award</td>
<td>August 2020</td>
<td>Notice to Proceed to be issued on or about Thursday, August 13, 2020.</td>
</tr>
</tbody>
</table>
Site Visits

In-Person Site visits for Proposing firms are to be scheduled by contacting Elizabeth Moss via email: emoss@umbc.edu

Two days for visits: Wednesday, May 13\textsuperscript{th} and Friday, May 15\textsuperscript{th}

Time slot for the visit will be provided based on availability due to current requirement of a maximum number of 10 people in a group

Only one person from each firm to attend. Additional site visits will be scheduled for short listed firms prior to the price proposal phase.

Individuals need to wear hard hats, glasses, vests, and face covering

Pictures may be taken, but no video recording
Solicitation RFP #BC-21194-C

REVIEW OF RFP
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 or 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.
Instructions to Proposers

• The Price Proposal shall be irrevocable for one hundred twenty (120) calendar days from the price proposal due date.

• A five percent (5%) proposal bond shall be included with the Price Proposal Submission. The awarded firm must furnish Performance and Payment bonds, each in the amount of 100% of the contract amount for construction work.
Instructions to Proposers

• MBE participation level is 5%.

• Only MDOT MBE certification is accepted.

• By submitting a proposal, proposing firms are committing to the 5% MBE participation level.

• MBE Attachment 1-1A, Part 2 Affidavit and Part 4 Signature MUST be submitted with the Technical Proposal.

• If these forms are not included, the proposing firm will be deemed “non-responsive and not susceptible for the award” – this is not curable.
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

• Solicitation document #BC-21194-C, any addenda and responses to questions; and

• Contract documents to include:
  – 19-113 Site Improvements – Phase I – Drawings – April 20, 2020
  – 19-113 Site Improvements – Phase I – Specifications – April 20, 2020

Solicitation documents are available on the UMBC ebid Board. Contract documents are available in the box folder provided in the solicitation.
Proposals, Evaluation, and Forms

• **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.
Proposals, Evaluation and Forms

• **Initial Technical Evaluation** will be conducted on the submitted technical proposals resulting in a short list.

• **Interview Sessions** will be conducted with those proposers who are short listed as a result of the initial technical evaluation.

• **Second Phase Evaluation** will be conducted after Interview sessions resulting in a second short list.

• **Price Proposals** will be requested from proposing firms who remain short listed after the second phase evaluation (second short list).
Solicitation #BC-21194-C

TECHNICAL PROPOSAL SUBMITTAL
Technical Proposal Submittal – Team Organization

Organizational Chart of the Proposed Team

- Proposing Firm Name and Team Organizational and Reporting Structure;

- Must include the (1) Project Executive, (2) Project Manager, and (3) Project Superintendent; and,

- Include Key Person’s Name and Project Role.

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

Key Personnel: Provide completed Key Personnel Forms for the following positions:

- Project Executive
- Project Manager
- Project Superintendent

By submitting these names, the proposer is committing these people to this project if the awarded Prime Contractor firm.
Key Personnel References:

– Include 3 references for each of the three (3) 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

**Firm Relevant Experience:**

- Complete the Prime Contractor Experience form for each of three (3) projects that meet the specific criteria in the solicitation documents.

- Firm experience is to demonstrate the Proposer’s experience as a prime contractor on multi-discipline projects of similar scope, complexity and cost.

- All projects must be constructed in the last 10 years or substantially complete by 5/1/20 (available for its intended purpose)

- All projects must have been done by the Proposing firm.
Found the criteria for the firm experience was not included so added it. And form is the Prime Contractor Experience Form in RFP not Firm Experience form -so changed it.

Terry Cook, 5/8/2020
Technical Proposal Submittal – Firm References

• Provide a reference with each project on the 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.
• 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 Approach and Preliminary Schedule

• **Project Approach:**

  • Provide a proposed approach to performing the work (see details in RFP)
  
  • Include a detailed rigging plan and a site/staging plan
  
  • Identify long lead equipment and material and approach to securing these items

• **Preliminary Schedule:** Provide a preliminary project schedule taking into consideration the campus break schedule
Separated out the Project Approach from the Project Schedule. Changed security to securing

Terry Cook, 5/8/2020
Technical Proposal Submittal – Profile of Proposer

Company Background:

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

• Provide financial information – D&B report with rating or most recent financial statement (higher consideration). Highest consideration if *audited* financial statements are submitted.

• Provide firm’s bonding capacity via written confirmation from firm’s bonding agent or bonding company (higher consideration).
Moved highest consideration if audited financial statements under financial information. And, added higher consideration after bonding company.

Terry Cook, 5/8/2020
Technical Proposal Submittal – Profile of Proposer

Experience Modifier Ratio (EMR):

• Provide your firm’s EMR

• For the last three (3) years (2017, 2018, and 2019).
Technical Proposal Submittal

Other Documents to be included:

• Contractor’s License (photocopy);

• Bid/Proposal Affidavit (completed and signed);

• MBE Attachment D-1A-Part 2 and 4*; and,

• Acknowledgement of Receipt of Addendum.

*Note: MBE Attachment D-1A-Part 2 and 4 Forms **MUST** be included; this is NOT curable.
Solicitation #BC-21194-C

INTERVIEW SESSION
Interview Session-Purpose

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

• Allow the Proposer to present and discuss its project approach and schedule.

• Discuss other elements/categories of the Technical Proposal.

• Provide opportunity to discuss/clarify the scope of services.

• Review the Price Proposal form.
Interview Session

• Key personnel *required* to attend:
  1. Project Executive
  2. Project Manager
  3. Project Superintendent

Other personnel are at the discretion of the Prime 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 Wednesday, 6/17/20 so proposers are advised to set this date aside.

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

• Requesting round table discussions with short listed firms.
Price Proposal Submittal – Lump sum

- The quoted price is an all-inclusive, lump sum price for the provision of the required services with completed breakdown.

- Price Proposal shall be submitted to the Box address.

- The Price Proposal shall be filled out completely inclusive of the attachments.

- Changes, alterations and additions to the Price Proposal form are NOT allowed.
Solicitation #BC-21194-C

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 on the due date/time in the solicitation schedule.
Evaluation Process

• Price proposals will not be opened publicly.

• Price proposals will be evaluated based on the sum total price with completed breakdown.

• 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 that proposal that will best serve its interest in accordance with USM procurement policies.
Solicitation #BC-21194-C

CONTRACT AWARD
Contract Award

• The recommendation for award will be submitted for the Board of Public Works on 8/12/20 BPW meeting.

• The successful Prime Contracting firm will be required to sign the University’s contract prior to the meeting.

• The selected Prime Contractor is required to submit documentation to confirm that the requirements for the mechanical, electrical and rigging subcontractors, as outlined in the RFP, are met prior to the University executing the contract.

• The University anticipates executing the contract in August 2020.
Procurement Overview
Solicitation – RFP #BC-21194-C
PROJECT OVERVIEW
PROJECT BACKGROUND

• UMBC has undertaken a two-phase campus-wide utility upgrade and site improvement project to more efficiently produce and distribute energy.

• This solicitation is for Phase I of the Project, which primarily encompasses the replacement of the hot water generator and electrical equipment.

• Phase I work has been preceded by installation of new HTHW valves to allow portions of system to be isolated to facilitate execution of work.
Utilities Upgrades Phase I Project Scope

- Project generally consists of:

  - Hot water generator: Remove existing hot water generator and install new one
  - Electrical feeders: Replace 5 electrical feeders in existing conduit pathways
  - Electric switchgear: Replace low and medium voltage switchgear in 3 buildings
  - Electric transformers: Replace transformers in 4 buildings

- Project to be completed with 12 months from NTP
PROJECT OVERVIEW

QUESTIONS
UMBC UTILITIES UPGRADES PHASE I PROJECT

SOLICITATION – RFP #BC-21194-C

PRE-PROPOSAL MEETING

11 MAY 20
Pre-Proposal WebEx Attendees
UMBC: Elizabeth Moss: emoss@umbc.edu, Tom Argasinski – UMBC Facilities
UMB: Mike Dougherty – UMB Facilities, Jean Graziano – UMB Procurement
RMF - Vince Basilio and Andrew Hay

1. Dawn Fox, J. Vinton Schafer, 410-335-3000, dfox@quandel.com
2. Brian Soethe, J. Vinton Schafer & Sons, Inc., 410-335-3000
3. Dan Shanahan, Denver-Elek, 410 808-0424, dshanahan@denver-Elek.com
4. Tom Mckelvey Frank Lill & Son, tmckelvey@franklillandson.com
5. Kelsie Andrews, Kimball Construction Company, Inc., 443-206-1704, kandrews@kimballcc.com
6. Chuck KonKolics Whiting-Turner - 443-506-6904
7. Art McGraw, Spectrum Engineering LLC, representing Indeck Power Equipment, local, 804-337-4090, quikdraw@mindspring.com
8. Brian Dailey - Indeck Power Equipment - Boiler OEM - bdailey@indeck-power.com, 847 541-8300 x3587
9. Libby Crothers – Maryland Mechanical Systems, eac@marymec.com, 410 327-4750
10. Greg Eberwein – Maryland Mechanical Systems, geberwein@marymec.com, 410 327-4750
11. Dan Shanahan – Denver-Elek, 410 574-8400 x242, dshanahan@denver-elek.com
12. Brett Landrum – Victory Energy, 918 382-4888, blandrum@victoryenergy.com
13. Mike Melton – Victory Energy, 918 382-4842, mmelton@victoryenergy.com
14. Chris Jarrett – M&M Welding, 301 948-9330, cjarrett@mandmwelding.com
15. Jeff McLaughlin – Freestate Baltimore, LLC – 443 738-1100, jmclaughlin@freestateelectric.com
16. Matt Corrigan – M&M Welding, 301 948-9330, mcorrigan@mandmwelding.com
17. Jim Hershey – Powrtech Solutions – 410 340-9567, jim.hershey@powrtechsolutions.com