

The purpose of this ADDENDUM NO. 1 dated May 03, 2021, 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.

2. **RFP Revisions:**

2.1 Section Solicitation Schedule- Interview Sessions for Shortlisted Firms: Delete "Anticipated 06/03/2021" and replace with "Anticipated 06/07/21".

2.2 Section 2.4 - Profile of Proposer – Annual Sales, Page 17: Delete "the last four (4) years (2016, 2017, 2018, and 2019)" and replace with "the last four (4) years (2017, 2018, 2019, and 2020)".

2.3 Section 2.4 - Profile of Proposer – Experience Modifier Ratio (EMR), Page 17: Delete "the last three (3) years (2017, 2018, and 2019)" and replace with "the last three (3) years (2018, 2019, and 2020)".

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 5/03/21

Attachments:

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

This Addendum #1 on RFP #BC-21220-E and its attachments are posted on UMBC's ebid Board at <http://procurement.umbc.edu/bid-board/>

RFP NO.: BC-21220-E

RFP FOR: UMBC ON-CALL MECHANICAL SERVICES

TECHNICAL PROPOSAL DUE DATE: Friday, May 14, 2021 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. <u>1</u>	dated <u>May 03, 2021</u>
Addendum No. _____	dated _____

Signature _____

Printed Name _____

Title _____

Date _____

UMBC On-Call Mechanical
Services
Solicitation

RFP# BC-21220-E
Pre-Proposal Meeting

29 April, 2021

SOLICITATION SCHEDULE



SOLICITATION SCHEDULE

EVENT/ACTIVITY	DAY/DATE	COMMENTS
Deadlines for Questions	Wednesday, 5/05/21 by 4:30 p.m.	Sent to espinoza@umbc.edu
Responses to Questions	By Monday, 5/10/21	Issued via addendum.
Technical Proposal	Friday, 5/14/21, on or before 11:59 p.m.	Submitted to the Issuing Office via UMBC Box. Ensure that automatic confirmation of upload is received.
Site visits	Monday 6/14/21 through 6/17/21	Site visits will be scheduled with shortlisted firms.
Discussion/Interview Session <i>with shortlisted firms only</i>	Monday, 6/07/21	Proposers are advised to set this date aside to avoid any conflicts.
Price Proposal (<i>anticipated date/time</i>)	Thursday, 6/17/21, on or before 11:59 p.m.	Price proposals to be submitted via UMBC Box
Contract start date		Anticipated to be July 09, 2021

Contract Overview

- Selected firms shall provide On-Call Mechanical Services throughout campus.
- The on-call contracts will include the maintenance, repair, replacement, and installation for mechanical systems. These services will primarily be utilized by the Office of Facilities Management (FM) through the issuance of task orders.
- The initial term for the contract will be three (3) years with two (2) three-year renewal options, at the University's sole discretion.
- Task Order Pricing will be structured in multiple ways.
- Multiple awards will be made from this solicitation; start date of contract anticipated as early July of 2021.
- The estimated annual dollar volume for work to be performed under the contract is \$200,000. UMBC makes no guarantee that any or that all of the estimated work will be assigned to the selected on-call mechanical firms.
- The University anticipates that task order size under this contract will range from approximately \$5,000 to \$100,000.
- Task orders shall be issued to the selected Contractors through rotation or through a competitive selection process.
- The University is unable to forecast the frequency of use.

Scope of Work

- Services shall be provided by well-established mechanical firms with extensive experience performing on-call mechanical maintenance in a higher education environment.
- The firm shall have a significant pool of employees on staff to ensure appropriate staffing of the contract, as well as the financial capability to support a large payroll.
- For each assigned task order, the Contractor is to furnish all labor, supervision, safety, and material necessary to comply with any applicable scope of work, specifications, and drawings provided by authorized personnel of the University.

Scope of Work

- The Contractor is responsible to coordinate all work with existing conditions, schedule, and operations of the University, and to complete the work in the time required by the University and in accordance with the task order requirements.
- Work is generally performed on the following types of systems: HVAC; High Temperature Hot Water/Chilled Water; and plumbing.
- Task Order Rotation:
 1. Less than \$25K will be rotated among selected firms
 2. \$25K and above may be awarded on rotation or through direct selection when it is determined by Procurement that it is in the best interest of the University.

Scope of Work

- Task Order Price Proposal Components:
 1. Itemized breakdown of the total costs for self-performed work (labor);
 2. Itemized list of material and equipment with quoted mark-up percentage;
 3. Subcontractor quotes with quoted mark-up percentage;
 4. Time frame/schedule; and
 5. MBE participation dollars and percentage.
 6. Name of the Project Manager and Field Superintendent to be assigned.

- Staffing:
 1. Contractor shall specify two (2) individuals as Project Managers and three (3) individuals as on-site Field Superintendents. These individuals shall be direct employees of the Contractor.
 2. The Field Superintendent shall be 100% on-site once the project commences at any time work is being performed on-site to manage the job and supervise all on-site personnel.

TECHNICAL PROPOSAL SUBMITTAL



Technical Proposal Format

- **Technical Proposals:** Submitted to UMBC's Department of Procurement & Strategic Sourcing via email to the Box address provided in the Solicitation Schedule.
 - File names for the documents are to include the RFP number and the Proposer's name.
 - Submit two (2) sets of the Technical Proposal as follows: One set in Microsoft Word format (for documents created in word processing format). One set in PDF Format.
- * Note: Only Technical Proposals are requested at this time.

Technical Proposal Submittal – Organization



Proposals shall be organized in the following format:

- Title page
- Profile of Proposer
- Contract Relevant Experience
- Key Personnel
- Acknowledgement of Addenda form
- Licenses and certifications
- Bid/Proposal Affidavit

*Failure to include all the documents may render the proposal non-responsive and the offer may be rejected.

Technical Proposal Submittal – Profile of Proposer



- Provide a brief but informative history of the firm.
- Indicate the type of mechanical services performed and the client base.
- Demonstrate at least five (5) years in the business of performing preventive maintenance, repairs, and service on mechanical systems.
- Firms must be must be licensed as required by the Construction Firm Law of Maryland (Title 17, Subtitle 6, of the Business Regulation Article of the Annotated Code of Maryland) and shall provide a copy of the firm's contractor license with their proposal.

Technical Proposal Submittal – Profile of Proposer



- Include the firm's annual sales volume on a per year basis for the last four (4) years (2017, 2018, 2019, and 2020) and indicate the number of projects and what percentage of such work is mechanical.
- Include the firm's Experience Modifier Ratio (EMR) for the last three (3) years (2018, 2019, and 2020).
- This section shall be limited to two pages with a font size no smaller than 11.

Technical Proposal Submittal – Contract Relevant Experience



- Complete the Contract/Project Experience Form provided in the RFP for each of the three (3) similar or relevant on call contracts.
- Provide a reference contact for each of the three (3) contracts including contact name, address, telephone number (including extension), and email address for each reference.
- Experience should clearly demonstrate a firm's experience with on-call mechanical maintenance services of similar complexity to the types of services under this contract.

Technical Proposal Submittal – Contract Relevant Experience



- The experience is to be similar in size, function, setting (higher education and occupied project setting) and complexity to the type of on-call relationship to be formed under this contract.
- Higher consideration will also be provided if proposed key people were involved in the submitted experience, particularly in the proposed role.

Technical Proposal Submittal – Key Personnel



- For each individual, provide requested information per the RFP under this section for the following individuals: One (1) Account Manager, who will act as the single point of contact for task order requests and coordinate the Contractor's response to requests; and Two (2) individuals designated as Project Managers; and at least Three (3) Field Superintendents, to be assigned to the Contract if selected.

Technical Proposal Submittal – Key Personnel



- Provide educational background; work experience with the proposing firm inclusive of duration, by dates, of employment and positions held; and work experience with prior employers, durations, by dates, of employment and positions held. Include applicable licenses and apprenticeships as relevant to demonstrate experience and background for the position.
- A minimum of three (3) projects performed under on call contracts shall be listed for each person.
- Key personnel must be current direct employees of the Proposing Firm and shall have at least five (5) years of experience working on mechanical maintenance projects.

Technical Proposal Submittal – Key Personnel



- Provide educational background; work experience with the proposing firm inclusive of duration, by dates, of employment and positions held; and work experience with prior employers, durations, by dates, of employment and positions held. Include applicable licenses and apprenticeships as relevant to demonstrate experience and background for the position.
- Field Superintendents listed for this contract shall hold current journeyman's or master's licenses in HVAC, Plumbing or Pipefitting. Higher consideration will be given if the Field Superintendents have experience in occupied settings and with higher education institutions.

Technical Proposal Submittal



Other Documents to be included:

- Bid/Proposal Affidavit (completed and signed); and
- Acknowledgement of Receipt of Addendum; and
- Licenses & Certifications

INTERVIEW SESSION



Interview Session-Purpose



- Allow the University to meet the firm'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 scope of services for the contract.

Interview Session



- Each firm will be required to have the following key personnel attend the interview: President/Owner or other individual with the Executive role for the contract, Account Manager, Project Managers, and Field Superintendents.
- Sessions will be 1-hour in duration and UMBC will confirm specifics of these sessions in writing.

Interview Session



- Sessions scheduled for 6/07/21 via Webex so proposers are advised to set this date aside.
- Forum will be informal. The University is not interested in a marketing presentation.
- A virtual meeting round table discussions with short listed On-Call Mechanical Services firms.

Price Proposal Submittal



- Price Proposal form will be issued to short listed firms at the appropriate time during the proposal process.

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



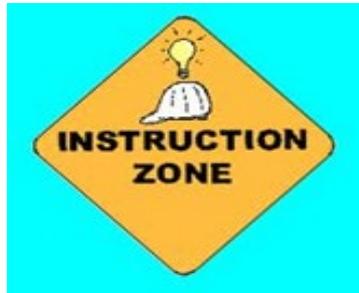
- Further information may be requested by UMBC during the technical evaluation process.
- UMBC may elect to conduct a Best & Final Technical phase.
- Proposers who remain short listed after the Second Phase Technical Evaluation will be asked to submit a Price Proposal.

Evaluation Process

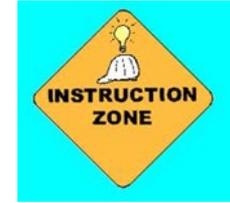


- The final proposal rating will be based on the combined evaluation of the Technical Proposal, Interview Session, and the Price Proposal.
- Technical merit will have a much greater weight than cost.
- The University will choose from among the highest rated proposals that will best serve its interest in accordance with USM procurement policies.

INSTRUCTIONS TO PROPOSERS



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 Rafael Espinoza at espinoza@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 email to the Box link provided in the RFP. 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



- 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.



UMBC On-Call Mechanical
Services
Solicitation

RFP# BC-21220-E
Pre-Proposal Meeting

29 April, 2021

PRE-PROPOSAL MEETING
UMBC ON-CALL MECHANICAL SERVICES
SOLICITATION NUMBER: #BC-21220-E
DATE: Thursday, April 29, 2021 at 2:00 p.m.

Firm Representative	Firm Name	Phone Number	Email Address
Michael O. Scherr	EMJAY	410-298-2000	Scherrm@emjaycons.com
Christa K. Gahagan	EMJAY	410-298-2000	gahaganc@emjaycons.com
Dan Shanahan	Denver- Elek		dshanahan@denver-elek.com
Alison Shea	Limbach Company		alison.shea@limbachinc.com
Rafael Espinoza	UMBC		
John Zahor	UMBC		
Thomas Myers	UMBC		
Gregory Linz	UMBC		
Willie Jones	UMBC		