

The purpose of this ADDENDUM NO. 1 dated September 13, 2021, is to distribute 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 initial technical proposal.***

1. **Pre-proposal Meeting:**
 - 1.1 A/E Pre-Proposal Meeting Power Point Presentation: Attached is provided the power point presentation in pdf format from the A/E Pre-Proposal meeting of 9/10/21.
 - 1.2 A/E Pre-Proposal Meeting Sign In Sheet: Attached is provided the sign-in sheet from the A/E Pre-proposal meeting of 9/10/21 which consists of five (5) pages.
2. **Acknowledgement of Addendum Form**: The attached Acknowledgement of Receipt of Addendum form is to be completed/signed and included with the Initial Technical Proposal.

END OF ADDENDUM #1 DATED 9/13/21

Attachments:

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

This Addendum #1 on A/E Solicitation #BC-21243-M and its attachments are posted on UMBC's ebid Board at <http://procurement.umbc.edu/bid-board/>

A/E SOLICITATION NO.: BC-21243-M

RFP FOR: UMBC SHERMAN HALL RENEWAL PROJECT

TECHNICAL PROPOSAL DUE DATE: Monday, September 27, 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. 1 dated September 13, 2021

Addendum No. _____ dated _____

Addendum No. _____ dated _____

Addendum No. _____ dated _____

Addendum No. _____ dated _____

Addendum No. _____ dated _____

Signature _____

Printed Name _____

Title _____

Date _____



UMBC SHERMAN HALL RENEWAL PROJECT

A/E SOLICITATION - #BC-21243-M
PRE-PROPOSAL MEETING
AND
SITE VISIT

September 10, 2021



A/E Solicitation #BC-21243-M

SOLICITATION SCHEDULE






EVENT/ACTIVITY	DAY/DATE	COMMENTS
Deadlines for Questions	Friday, 9/17/21 at 5:00 pm	Sent to emoss@umbc.edu
Responses to Questions	Tuesday, 9/21/21	Issued via addendum on UMBC bid board
Initial Technical Proposal	Monday, 9/27/21, by 11:59 p.m.	Submitted to the Box address in solicitation document.
Second Phase Technical Proposals <i>from shortlisted firms only</i>	Wednesday, 10/27/21 by 11:59 p.m.	Submitted to the box address in solicitation document
Interview Sessions <i>with shortlisted firms only</i>	Monday, 11/8/21, 9 am - 5 pm	Proposers are advised to set this date aside to avoid any conflicts.
Notification of top ranked firm	Tuesday, 11/9/21	Scope clarification items from top ranked firm due by noon on Tuesday, 11/16/21
A/E Fee Negotiations	12/08/21 – 02/04/22	Fee pre-proposal meeting on Tuesday, 11/23/21
BPW Meeting	March 2022	Actual date is dependent on number of negotiation sessions

A/E Solicitation #BC-21243-M

REVIEW OF A/E RFP



Section 2 - Summary and Background

- Sherman Hall Renewal project will be designed and constructed as a phased, occupied renovation.
 - A/E will be required to provide complete design services for the 6 project phases - Schematic Design through Post Construction.
 - The University will be using the CMAR delivery method on this project.
- 

Section 3 - Definitions

- Definitions of terms are provided
- These definitions apply to this A/E procurement.



Section 4 – A/E Scope of Work

- The A/E will be obligated to design the project to the specified Project Construction Costs [=Design to Dollar (DTD) amount].
- The DTD amount is \$72.8M.



Section 4 - A/E Scope of Work

- The total project schedule is 51 months with the anticipated durations of the Project phases as follows:
 - Design: 12 months
 - Bidding: 3 months
 - Construction: 36 months



Section 4 – A/E Scope of Work

- Design time frames include the following:
 - SD: 4 weeks for design review, cost estimate preparation and reconciliation, and VE efforts
 - DD: 5 weeks for design review, cost estimate preparation and reconciliation, and VE efforts
 - 50% CD: 4 weeks for design review, cost estimate preparation and reconciliation, and VE efforts
 - 95% CD: 2 weeks for design review
 - 100% CD: 1 week back check



Section 4 – A/E Scope of Work

- The construction time frame is 36 months.
- The University desires to improve upon this schedule wherever possible.



Section 5 - 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/>.

Section 5 – Instructions to Proposers

- The link to the A/E standard contract form is provided in the solicitation document
- The initial contract will be executed through Design Development phase, with subsequent amendments anticipated for the remainder of the design phases, and later for the construction administration and post construction phases.
- UMBC Procurement will handle and be solely responsible for the contract administration and management of the executed A/E contract.



Section 5 - Instructions to Proposers

- MBE participation level for this solicitation is 5% for subconsultants.
- There are no MBE subgoals.
- 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. MBE -1A, Part 3 MBE Participation Schedule must be submitted with the Proposals.
- If these forms are not included, the proposing firm will be deemed “non-responsive and not susceptible for the award” – this is not curable.

Section 5 - 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.

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TECHNICAL PROPOSAL SUBMITTAL





Section 6 – Initial Technical Proposal

SF 330 – Part I

Section A – Contract Information

Section B – A/E Point of Contact: Name and contact information

Section C – Proposed Team: Listing of all of the firms on the A/E team by name, address, and role

SF-330 – Part I *(continued)*

Section D - Organizational Chart

1. Chart: To include the following:
 - Each of the Firm's name, discipline or specialty
 - Each key person's name, role, discipline or specialty, and office location *(city/state)*
 - Managerial relationships among the persons and firms
2. Written description of proposed contractual relationships among the firms *(see specific information about JV firms in the solicitation document)*
3. Summary or matrix of prior working relationships among the proposed firms

SF 330 – Part I *(continued)*

Section E – Resumes of Proposed Key Personnel:

- Resumes to be submitted for the requested Key Personnel (9) based on the definitions provided; must be direct employees of the applicable firms.

Notes regarding CA Professionals (Architectural and M/E/P):

- Preference that these positions be people involved during the design with higher consideration if this is the case.
- If the CA Professionals are members of the team in another role, Proposers are to submit an additional resume for the CA role to demonstrate project experience in this role versus the design role.

SF 330 – Part I *(continued)*

Section E – Proposed Key Personnel *(continued)*:

- Resumes shall include all required information on SF330 form: (1) project name and location; (2) description; (3) delivery method; (4) construction cost; (5) project start and completion date; and (6) specific role of the individual and the dates of the individual's involvement

Note: By submitting these names for the University's consideration, the proposer is committing these people to the University for the project's duration. No changes are permitted without written authorization via an amendment to the A/E contract.



SF 330 – Part I *(continued)*

Section F – Project Experience for A/E team firms

A total of (8) projects are to be submitted as follows:

Team Member	# of projects
Prime A/E firm	2
Mechanical Engineer	2
Electrical Engineer	2
Cost Estimator	2



SF 330 – Part I *(continued)*

Section F – Project Experience for A/E team firms

- The project submission is to include all information noted in the solicitation
- Submitted projects must be similar or relevant to UMBC's Sherman Hall Renewal Project
- See higher consideration factors for each firm's projects
- For project construction costs, an escalation chart has been included to determine the project size in today's dollars.



SF 330 – Part I *(continued)*

Section F – Example Projects – Prime A/E Firm

# of Projects	Requirements	Higher Consideration Factors
2	<p>1 – Completed and occupied for 6 months</p> <p>1 – CM at Risk (with GMP) contract method</p> <p>1 – must exceed \$50M in renovation construction value (other project must exceed \$35M)</p> <p>Both projects must be renovation projects (one must have been constructed in phased occupied setting)</p>	<p>Proposed key people were involved in submitted project, particularly in the proposed role</p> <p>Higher Education setting</p> <p>Project included building envelope replacement</p> <p>Design assist for building envelope or MEP is applicable to submitted project</p> <p>Project constructed in occupied setting</p> <p>Projects are closer in size to UMBC project based on construction cost</p>

SF 330 – Part I *(continued)*

Section F – Example Projects – M/E Firm

# of Projects	Requirements	Higher Consideration Factors
<p>4 (2 mechanical, 2 electrical)</p>	<p>2 – Completed and occupied for 6 months (one from each discipline)</p> <p>2 – Substantially completed (one from each discipline)</p> <p>2 – CM at Risk (with GMP) contract method (one from each discipline)</p> <p>1 – value of mechanical work must exceed \$25M</p> <p>1 – value of electrical work must exceed \$15M</p> <p>1 – one from each discipline must be a renovation project</p>	<p>Proposed key people were involved in submitted project, particularly in the proposed role</p> <p>Higher Education setting</p> <p>Project is constructed in an occupied setting</p> <p>Projects are closer in size to UMBC project based on construction cost</p> <p>Include HTHW for mechanical projects</p>

SF 330 – Part I *(continued)*

Section F – Example Projects – Cost Estimating

# of Projects	Requirements	Higher Consideration Factors
2	Substantially completed CM at Risk project delivery method 1- in excess of \$50M in renovation construction costs 1- phased occupied, renovation	Proposed cost estimator was involved in submitted project, particularly in the proposed role Project included building envelope replacement Projects are closer in size to UMBC project based on construction cost

Section F – Example Project Notes

- Include all requested project information on each project per the A/E solicitation documents
- Limit each project to one page (excluding project photos).
- Best consideration will be given to projects with the characteristics identified in the solicitation document.
- Failure to follow the outlined instructions in the solicitation may result in a lower evaluation.



SF 330 – Part I *(continued)*

Section G: Key Personnel Participation in Example Projects

- Provide matrix depicting proposed key personnel on the example projects and their role
- Higher consideration will be given if the key personnel's role is the same for both this UMBC project and the example projects



SF 330 – Part I *(continued)*

Section H: Additional Information – Summary of Qualifications

- A summary of qualifications
- A written description of why the Proposer is most qualified and skilled to design this project.

This information should be objective and limited to not more than 2 typewritten pages with a font size no smaller than 11



Basis for Selection

- Provide a brief explanation as to why each firm was selected for the proposed A/E team by the Proposing firm.
- Limit the response to 3 pages





Documentation and Forms

- Complete the License Documentation form
- Professional Liability Insurance form (\$5M coverage)
- MBE Attachment A-1A – parts 2 and 3 must be included – this can not be cured
- Bid/Proposal Affidavit form
- Acknowledgement of Receipt of Addendum

Note: Technical proposals are to be compiled in the order listed in the solicitation. It is preferable that tabs separating each section/aspect of the response be utilized.





References

- Firm (3) References:
 - Prime/Proposing A/E firm
 - Mechanical/Electrical Engineering Firm
 - Cost Estimating Firm
- Key Personnel (7) References:
 - A/E Project Manager
 - Project Architect
 - Mechanical Engineer
 - Electrical Engineer
 - Cost Estimator
 - CA Professional (Architectural)
 - CA Professional (M/E/P)





References

Firm References:

- Complete the Firm Reference Form for each identified firm.
- References are to be based on the submitted projects.
- Provide two additional references for each firm.

Key Personnel References:

- Complete the Key Personnel Reference form on each of the identified key people
- Provide three (3) references for each person based on the submitted project experience.



References Notes

- References are to be from different projects; that is, only one reference per project.
- Only one reference per firm or person from UMBC and one reference from UMB.
- References are to be submitted in the Initial Technical Proposal, however the University will be conducting reference checking on short-listed firms only.
- References are to be able to speak to the firm or key person's performance.

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.



Second Phase Technical

Second Phase Technical Proposal will be requested from *short-listed proposers only*

Submitted to UMBC's Department of Procurement & Strategic Sourcing via identified Box site.

Second Phase Technical Proposal Submittal

- Project Approach:
 - intended approach to the design of the project based on the various elements, the DTD amount, the occupied setting and the phased approach to construction
- Building Envelope Replacement:
 - vision for design of façade based on project program, site visit, and A/E team experience
 - thoughts about utilizing design assist given the Façade Condition and Recommendation Report dated 10/21/18



Second Phase Technical Proposal Submittal

Special/Unique Qualifications:

- Provide narrative to elaborate on the special/unique qualifications and experiences of the proposed A/E team (firms and key personnel) which make it uniquely capable to provide A/E services on the UMBC project
- Project Experience included in this section is to be in addition to projects submitted previously
- Narrative is to demonstrate why the proposed A/E team is distinctively capable to provide the A/E services on this UMBC project

Second Phase Technical Proposal Submittal

Quality Control Program:

- Provide narrative of “how” the proposing A/E team will provide well-coordinated, high quality design documents on Sherman Hall
- Include what “tools” will be utilized with samples provided

Key Personnel Workload form:

Complete this form for the following only:

- A/E Project Manager
- A/E Project Architect
- Mechanical Engineer
- Electrical Engineer

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INTERVIEW SESSION





Second Phase Interview Sessions

- Interview Sessions *with shortlisted firms only*
- To be held on Monday, 11/8/21 between 9:00 am – 5:00 pm
- Proposers are advised to set this date aside to avoid a conflict





Interview Session-Purpose

- Allow the University to meet the A/E Proposer's key personnel.
- Review the Proposer's Project Approach as submitted in its Second Phase Technical Proposal
- Discuss the Proposer's vision for the design of the façade.
- Allow the Proposer to respond to other inquiries from the University during the course of the session.



Interview Session

- Key personnel **required** to attend:
 1. Principal in Charge
 2. A/E Project Manager
 3. Project Architect
 4. Mechanical Engineer
 5. Electrical Engineer

Other personnel are at the discretion of the A/E 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.
- Forum will be informal. The University is not interested in a marketing presentation.
- Requesting round table discussions with short listed A/E firms.

Section 8 - Evaluation

- University Qualifications Committee
- Initial Technical Proposals evaluation conducted
- Resulting in a short list of firms
- All proposers will be notified

Section 8 - Evaluation

- Short listed firms will be invited to (1) submit a Second Phase Technical proposal; and (2) conduct an interview session.
- Second phase technical evaluation will be conducted after the interviews inclusive of the results from the reference checking as indicated in the solicitation
- Qualifications Committee will submit a final ranking of the short listed firms.
- Upon approval of the Committee's ranking report, all shortlisted firms will be notified
- A University Negotiation Committee will be designated.

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NEGOTIATION PROCESS

Negotiation Process

- A/E proposer ranked #1 will be requested to submit a Fee Proposal
- Scope Clarifications due on Tuesday, 11/16/21 by 12:00 noon sent electronically
- Fee pre-proposal meeting to be held on Tuesday, 11/23/21, time to be determined

Negotiation Process

- First Fee Proposal is due on Wednesday, 12/08/21 by 5:00 pm sent electronically
- Fee proposal to include MBE Attachments (A-3A – MBE Subcontractor Project Participation Certification and Attachment A-3B MBE Prime Project Participation Certification)
- Fee Negotiation Meetings scheduled for 12/21/21, 1/14/22, 1/26/22, and 2/4/22



Contract Award

- Upon successful conclusion of negotiations, the recommended award will be reviewed for approval by the University Review Group (URG).
- Upon approval by URG, the University will submit the contract for BPW approval at early March meeting.
- The successful A/E firm will be required to sign the University's A/E contract prior to the BPW meeting.
- Upon approval by the Board of Public Works, the University will fully execute the contract.

Available Project Information



- University of Maryland Baltimore's 2019 edition of the Procedure Manual for Professional A/E services, available through link in solicitation document
- UMBC Documents available in Box site included in solicitation document:
 - Sherman Hall Renewal Facility Program, Part II dated March 2021
 - UMBC Supplement to UMB Procedure Manual for Professional Architectural/Engineering Services dated 8/25/21, including attachments
 - Facilities Assessment Consultant Services for Sherman Hall dated September 8, 2020
 - Sherman Hall Façade Condition and Recommendation report dated October 31, 2018
 - Evaluation of Modular Brick Masonry Unity and Masonry Systems dated December 15, 2017

Questions on the Procurement Process?





Solicitation – RFP #BC-21243-M

PROJECT OVERVIEW

Project Overview

- 41-year-old Sherman Hall provides office, classroom, and teaching lab space in support of 8 academic programs
- Building is 59,707 net assignable square feet and 122,545 gross square feet.
- Project includes restoration of the building envelope, corrections of barriers to accessibility, and replacement and upgrade of mechanical, electrical, plumbing, and life safety systems
- Goal is to extend building's useful life by 30 plus years.

Project Overview

- Limited reconfiguration of existing spaces to address programmatic deficiencies
- Renew building finishes
- Construction work will be phased as building will remain occupied during project
- Review the following reports
 - Sherman Hall Renewal Facility Program, Part II dated March 2021
 - Facilities Assessment Consultant Services for Sherman Hall dated September 8, 2020
 - Sherman Hall Façade Condition and Recommendation report dated October 31, 2018
 - Evaluation of Modular Brick Masonry Unity and Masonry Systems dated December 15, 2017



Fine Arts + Meyerhoff on 220



Meyerhoff on 196



Math/Psych + Sondheim on 196
Sherman Hall + Sondheim



Engineering
ITE



Sherman Hall on 220



Sherman Hall courtyard



Sherman Hall Location

PROJECT OVERVIEW

QUESTIONS





Sherman Hall Renewal Project A/E Solicitation

Project Site Visit



UMBC SHERMAN HALL RENEWAL PROJECT

SOLICITATION – #BC-21243-M

PRE-PROPOSAL MEETING

10 SEPTEMBER 21

UMBC SOLICITATION FOR A/E PROFESSIONAL SERVICES FOR SHERMAN HALL RENEWAL PROJECT

#BC-21243-M

PRE-PROPOSAL MEETING – 10SEPTEMBER21 - LIST OF ATTENDEES

#	Person's Name	Firm/Organization	Email Address	Telephone No.	Prime Architect (P), Associate Architect (AA), or Sub Consultant (S) (Indicate P, AA, or S)
1	SEAN SENFT	STRATIFIED	ssenft@stratified.us	717-858-4308	S
2	Chris Greaney	AEI	cgreaney@aeieng.com	301	S
3	Scott Spangenberg	AEI	sspangenberg@aeieng.com	301	S
4	Maria Belli	JMT	mbelli@jmt.com	x2321	P
5	JACQUELINE KILLIP	WALDON STUDIO ARCHITECTS	JKILLIP@WALDONSTUDIO.COM	410-290-9680	S
6	Jack Nye	URA	jnye@urallp.com	443-224-1626	P
7	CASEY ROSS	BKM	CROSS@BKMA.COM	410-624-8255	S
8	JOE BRIGGS	JMT	JBRIGGS@JMT.COM	443.838.3830	P
9	Steve Devon	RMF	Steve.Devon@RMF.com		
10	Zachary Robertson	Sik Resources Inc.	zrobertson@sikresourcesinc.com sellioth@sikresourcesinc.com	453-689-0970	S
11	Rebecca McCormick	Murphy & Dittlerhoffer	RLM@murphdittarch.com	336-655-5740	P

UMBC SOLICITATION FOR A/E PROFESSIONAL SERVICES FOR SHERMAN HALL RENEWAL PROJECT

#BC-21243-M

PRE-PROPOSAL MEETING – 10SEPTEMBER21 - LIST OF ATTENDEES

#	Person's Name	Firm/Organization	Email Address	Telephone No.	Prime Architect (P), Associate Architect (AA), or Sub Consultant (S) (Indicate P, AA, or S)
12	COREY CHANG	AYERS SAINT GROSS	cchang@ayerssaintgross.com	410-347-8500	P
13	Jeff Caldwell	James Posey Assoc.	jcaldwell@jamesposey.com	410-265-6100	S
14	Steve Whitman	Coffman Eng	Steven.whitman@coffman.com	301-538-0986	S
15	Matt Thomasson	Rk+k	mthomasson@rk+k.com	410-462-9259	S
16	Karen Schulte	Mueller Assoc	kschulte@muellerassoc.com	410-646-4500	S
17	ERIC OBER	SGH	erobere@sgh.com	240-328-3805	S
18	STEVEN ORLANSKY	NEUMAN	SORLANSKY@NEUMANARCHITECTS.COM	202-838-9451	P
19	DAVID GAUDREAU	EWINGCOLE	dgaudreau@ewingcole.com	410-837-5040	P
20	RAY HEIL	PELA DESIGN	raymondheil@verizon.net	443-991-9133	S
21	Rachel Barry	Carroll Engineering	rbarry@ceiengineering.com	410-785-7423	S (WBE)

UMBC SOLICITATION FOR A/E PROFESSIONAL SERVICES FOR SHERMAN HALL RENEWAL PROJECT

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#	Person's Name	Firm/Organization	Email Address	Telephone No.	Prime Architect (P), Associate Architect (AA), or Sub Consultant (S) (Indicate P, AA, or S)
22	JOHN MORRELE	MCA ARCHITECTURE	jmorrele@mea.design	410.532.3131	P
23	JASON DITTRICH	Mueller Associates	jdittrich@muellerassoc.com	410.299.4236	S - MEP / FP Lighting
24	Leika Uzcategui	(cost) Rider Levett Bucknall	leika.uzcategui@us.rlb.com	(410)740-1671	S - COST
25	Michael Radio	Ballinger	URADSO@Ballinger.com	215-446-0522	AE
26	Steve BARTLETT	BAUMBER	sbartlett@ballinger.com	(610)761 8096	AE
27	Ty CORNER	UMBC	tcornor@umbc.edu	410-455-3583	owner
28	Paul ORZEWILZ	SETTY ENGINEERS	PAUL.ORZEWILZ@SETTY.COM	410-218-7130	S
29	Kiana Smith	Kumi Construction Management Corp	Ksmith@kumicm.com	410.244.8041	S
30	ANYA GRANT	LEO A DALY	aagrants@leoadaly.com	202.861.4600	P
31	ELLIC FEISS	GWWD	efeisse@gwwdinc.com	410 332 1009	P
32	TODD GARING	MUELLER	tgaring@muellerassoc.com	410-646-4500	S - MEP

UMBC SOLICITATION FOR A/E PROFESSIONAL SERVICES FOR SHERMAN HALL RENEWAL PROJECT

#BC-21243-M

PRE-PROPOSAL MEETING – 10SEPTEMBER21 - LIST OF ATTENDEES

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33	ANIKKEN BUSACK	USA ARCHITECTS	ABUSACK@USAARCHITECTS.COM	*215-710-3835 484-951-0030	
34	MARVIN KEMP	DESIGN COLLECTIVE	MKEMP@DESIGNCOLLECTIVE.COM	410 685 6655	
35	Bonni Dickens	Kumi Constr Management	rdickens@kumichm.com	410-244-8641	S
36	MOUSTAPHA DIACK	LORING CONSULTING ENR	mdiack@loringengineers.com	240.539.7211	S
37	MIKE DOUGHERTY	UMB			

UMBC SOLICITATION FOR A/E PROFESSIONAL SERVICES FOR SHERMAN HALL RENEWAL PROJECT

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38	Will Jovel	Design Collective	wjovel@designcollective.com	410.685.6655	P
39	JOHN BAXTER	EYP	JBAXTER@EYP.AE.COM	202-253-1284	P
40	Alice Storm Jones	Floura Teeter Landscape Arch	astormjones@floura-teeter.com	410.218.3837	MBE SUB
41	DILAN MACK	MODULUS	DMACK@MODULUSCOMPANY.COM	240-643-3129	MBE S
42	Elizabeth Moss	UMBC Procurement			
43	Wray Goodwin	UMBC FM			