



**PRE-PROPOSAL MEETING
ON CALL CM AT RISK
FOR THE UNIVERSITY OF MARYLAND,
BALTIMORE
RFP# 91097 CB
JUNE 12, 2024**

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**INFORMATION AVAILABLE TO
PROPOSERS**

- Contract documents are available via eBid Board at <http://www.umaryland.edu/procurement/ebid-board/>.
- Documents include:
 - RFP
 - Forms (Attachment A)
 - Addenda, as applicable

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SECTION 1: SOLICITATION SCHEDULE

Issue Date	June 5, 2024
Pre-proposal Meeting	June 12, 2024
Deadline for Questions	June 20, 2024
Phase 1 Technical Proposal*	July 2, 2024
Phase 2 Technical Proposal *	August 5, 2024
Oral Interviews	August 14-15, 2024
Price Proposal*	August 22, 2024
Award Notification on or about	August 27, 2024
BPW approval (Anticipated)	October 2, 2024

***Late proposals will not be accepted**

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ATTACHMENT J: SOLICITATION TERMS AND CONDITIONS INCLUDING DEFINITIONS

Issuing Office –

UMB Office of Construction & Facilities Strategic
Acquisitions (UMB CFSA)

Contact:

Christina Blair

cblair@umaryland.edu

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SECTION 2: GENERAL INFORMATION

Solicitation Purpose

The purpose of the Request for Proposal (RFP or Solicitation) is for the University of Maryland, Baltimore (UMB) to procure On Call Construction Management at Risk Services for design and construction of various projects.

- Work primarily at UMB

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SECTION 2: GENERAL INFORMATION

Response to this RFP

- Phase 1 Technical Proposal: Open to any firm
- Phase 2 Technical Proposal & Oral Interviews: Only those firms shortlisted following the Phase 1 Evaluations.
- Cost Proposal Phase: Only those firms shortlisted following the Phase 2 Evaluations.

proc-oncallbids@umaryland.edu

Max 25 MB attachment

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JMO

ATTACHMENT J: SOLICITATION TERMS AND CONDITIONS INCLUDING DEFINITIONS

- Please Mark Confidential/Proprietary Information
- MBE Participation will be set on Task Orders
- Note Joint Venture Requirements
- eMaryland Marketplace Advantage registration
- Contract Documents

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SECTION 2: GENERAL INFORMATION

Contract Award

- Contract Term – initial contract term is to be a three (3) year “Base Contract”, with renewal for ^{JMO} up to a two years at UMB’s discretion.
- Multiple awards will be made.

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SECTION 2: GENERAL INFORMATION

Contract Overview

- The Task Orders will generally be \$1-15 million, with most projects under \$5M.
- UMB will generally rotate Task Orders
 - Reserve the right to be ‘Smart’ about Rotation
 - May also choose to issue competitive TORP, particularly on relatively large projects
- Estimated annual dollar volume of \$25M total
- Anticipate a slow first year, with 1-2 projects awarded to each contractor per year following

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SECTION 2: GENERAL INFORMATION

Contract Renewal/Rate Changes

- Rates apply to task orders initially assigned/awarded during that period for the life of each of task order
- CM may request rate adjustments at renewal.
- Simple percentage method, utilizing the referenced hourly earning index, unless an alternate method is agreed prior to contract execution
- Insurance rate adjustment discussion
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SECTION 3: SCOPE OF SERVICES

Project Development/Scope

- Pre-Con CM Services Fee as a reimbursable to be billed against a NTE amount, or a University established allowance, at hourly labor rates
- The RFP includes an outline of the level of effort expected for Pre-Con and Construction Phase Services for informational purposes only
- Key elements of Pre-Con and Construction Phase Services confirmed on a task order basis
- Task Orders will include Construction and Maintenance, which impacts State requirements and approvals.

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Anticipated University Project Types JMO

Noted under Section 4, Item 4.1.3. as “**Similarities of the submitted projects to the University’s projects**”

- Construction Cost (excluding furnishings, fixtures and equipment): \$1 Million -\$15 Million in building construction cost.
- Building Type: Academic building with learning spaces (preferably professional schools)
- Setting: Occupied, phased renovation at a Higher Education institution (can include comparable academic programs in community colleges), on a campus with tight logistical site constraints.
- Sustainability: Green Building objectives and enhanced commissioning of all systems.

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SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

- 4.1 Phase 1 Technical Proposal
- 4.2 Phase 2 Technical Proposal & Oral Interviews
- 4.3 Technical Evaluations
- 4.4 Cost Proposal/Final Evaluations and Selection

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A3 Explanation

- Firms have discretion on layout/format, but make sure information is addressed. (One sample follows, but there are many options.
- Sample is just that.
- Respect everyone's time and effort: What is the most important information?

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EXAMPLE OF AN A3 FORMAT

GENERAL INFORMATION

WHY GRANGER CONSTRUCTION
(Ex. 100) | Licensed Michigan Corporation since 1900

Granger Construction has been serving Michigan State University since our inception as a company over 80 years ago. Our team will bring passion, creative solutions and a CAN DO attitude to the Dairy Cattle Teaching and Research Center Project. We are MSU's best construction partner because of our track:

- Capabilities and capacity to self-perform key trade work like Heating, Cooling and Carpentry to maintain project scope, reduce cost and mitigate on-going work labor shortages.
- 30-year working relationship with our state company Granger Energy on dozens of Water to Energy projects across the state.
- Experience with AgriSense and sustainable technology at Granger is second to none, so we can provide real value in the planning and execution phases.
- Recent experience to draw from regarding Pre-Engineered buildings that will help provide expertise when it comes to cost, performance and execution in the field.
- A rich history and proven working relationship with DTE&E on campus and all over Michigan. We are ready to enter the team as we work through the selection process.
- The ability to integrate specialized equipment and technology. Whether its robotic welding, cutting edge lift equipment or mass timber, we are able to manage the conventional and value construction by the way we manage the decision making process.

Address: 6267 Annapolis Rd, Lansing, MI 48911
Federal ID Number: 38-3620213

Granger's Bonding Capacity:

\$1.5 MILLION in active bonds | **\$500 MILLION** in performance bonds | **\$472.5 MILLION** in surety bonds

Identify if your function is an MBE, WBE, or other DBE (A/BE). Granger Construction is not a diverse supplier, but we are committed to encouraging participation from diverse parties. Our list of strengths includes relationships from across the entire state and experience with many contracting entities - all which will allow us to find additional opportunities to engage with diverse firms on this project.

Does your function have an Affirmative Action Plan(s) approved by the Michigan Department of Civil Rights? Granger Construction Company has long held a Certificate of Affirmative Action from the Michigan Department of Civil Rights and is fully committed to affirmative action and to the use of our employees as being positive. The Michigan Department of Civil Rights issues a Certificate of Affirmative Action to those firms who demonstrate an effective and proactive Internal Affirmative Action plan and commitment. They do not require Affirmative Action Plans per se.

Granger Contact Person:
The Mackinnon, PE, Esq.
Project Executive / Vice President
(517) 739-5864 | tmackinnon@grangerconstruction.com

Tom Mackinnon
Certification by office of State I certify on the best of my knowledge that the information provided is complete and accurate.



MOOT BOARD FACILITIES PROJECT: The DTE&E funded project required a deep understanding of the DTE&E budgeting process and pre-engineered metal building construction.



MSU VETERINARY DIAGNOSTIC LAB (VDL): This highly MSU facility required a unique combination of research grade planning and construction, high specialized equipment and experience of multiple individuals from MSU and the State of Michigan.

PROFESSIONAL STAFF *Total Personnel Employees: 228*

10 Principals or Officers	56 Field Managers / Superintendents	49 Project Admin / Project Managers
11 Chief Estimating and Construction	29 Project Engineers	12 Support of Admin. Offices
24 Estimators / Field Support	18 Business Personnel	04 Visual Design / Construction/3D
12 Project Estimators	11 Certified Professional Engineers	01 Registered / Licensed Architect
19 LEED AP Certified	03 CM LEAN Certified	02 LEED GA Certified

DISTRIBUTION OF PROJECTS
% of Revenue

9% less than 200K	42% green less 25 million but less than 50M	49% green less than 50M
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COMMITMENT TO DIVERSITY, EQUALITY & INCLUSION (DEI)

Granger is fully committed to supporting and advancing Diversity, Equity & Inclusion. Enhancing MSU's campus built projects, without compromising the quality, progress of MSU or the safety of campus. Granger is always a central, visible link in our business with regard to subcontractor engagement, business practices, community engagement and corporate culture.

Allyship Matters, our Pre-Construction Bid Conditions, has been implemented by improving Granger's subcontractor diversity program by including building/contractor-owned or minority-owned subcontractors to establish, maintain, measurement and work for working our program. Through Bid/Contractor we are able to ensure MBE subcontractor participation across all of our projects. These measurements of targeted, Subcontract and Awarded fully or substantially if we are successfully meeting diverse subcontractors, including the right to bid.

Establishing an equitable environment where our DEI commitments can be successful among their own diverse peers.

Inclusion and equity come from the sharing of ideas, opportunities and progression, and Granger values this inclusivity and push us all forward for the most growth of construction. To facilitate this growth, we have made efforts to improve Granger's website, making it easier for new subcontractors to connect with us on Building/Contractor and business opportunities to bid and work on Granger projects. Other examples of how we make an impact on MSU include community engagement, forums, and partnerships in online, in-person, and on-site.

Please refer to Question #6 for a project profile 2023 plan.

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SECTION 4: PROCUREMENT PHASES AND EVALUATION PROCESS

Phase 1 Technical Proposal Submittals

- 4.1.1 General Information (provide on one A3)
 - Basic Info
 - Firm Org Chart
 - Permanent Employee breakdown
 - Bond Capacity
 - \$ Construction in Place past 3 years
 - Other notable facts
 - Certification
- 4.1.2 Team Resumes (single 8.5 x 11)
 - Qty 1: CM Principal
 - Qty determined by CM's proposal: CM Px, CM PM, CM Pre-Con Manager, CM Field Super

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SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

Phase 1 Technical Proposal Submittals, cont.

- 4.1.3 Firm Relevant Experience/Firm References (provide each relationship on one A3): At least 4 projects with each
 - Project name and brief description
 - Key challenges and lessons learned
 - Year completed
 - Role of those proposed team members involved
 - Project Owner and contact
 - Similarities to the University's projects
- 4.1.4 Experience with Institutional Owners (provide on one A3)
 - Successes
 - Challenges

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SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

Phase 1 Technical Proposal Submittals, cont.

- 4.1.5 Certifications/Forms:
 - Copy of Contractor's License
 - Bid/Proposal Affidavit (Attachment A)
 - MBE Attachment H-1A Part 2, MBE Utilization and Fair Solicitation Affidavit for the Framework Contract (Attachment A)
- Due by: July 2, 2024 at 2:00 p.m.

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SECTION 4: PROCUREMENT PHASES AND EVALUATION PROCESS

Phase 2 Technical Proposal Submittals

- 4.2.1 Key Issues for UMB (provide on one A3)
 - Adding Value
 - Hidden opportunities for USM
 - 4.2.2 Procurement (provide on one A3)
 - Opportunities for smart/start procurement within USM
 - MBE Strategy
 - Certification
 - 4.2.3 Team Staffing Approach (provide on one A3)
 - Framework Contract Staffing Strategy
 - Task Order Staffing Plan
 - 4.2.4 Pre-Con Services, Sample Documents
 - Cost Estimate
 - Constructability Review
 - Value Engineering Reports
- Due by: August 5, 2024 at 2:00 p.m.

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SECTION 4: PROCUREMENT PHASES AND EVALUATION PROCESS

Oral Interviews

- Anticipated dates: August 14-15, 2024
- Advised to set aside these dates on calendars of key personnel whose attendance is required.

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SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

RFP 4.3 Technical Evaluation

- 4.3.1 – Evaluation of Proposals
- 4.3.3 – Phase 1 Technical Evaluation
- 4.3.4 – Phase 2 Technical Evaluation

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SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

Cost Proposal Phase

- Maximum Unit Costs
 - Hourly reimbursable personnel labor categories for Pre-Con and On Site Construction Phase CM services
 - Mark-up on self-performed work
 - Mark-up for bonds and insurance
 - Mark-up for Subcontractor Default Insurance (if applicable)
 - Percentage fee for Construction Phase CM services.
- Cost Proposal Due by: August 22, 2024 at 2:00⁰⁰_{JM0} p.m.

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Sample Cost Proposal

Maximum Personnel Billing Rates for all offered service labor categories for the initial three-year contract term

FIRM NAME: _____

Quote maximum hourly rates for each labor category and/or staff person offered by the Proposer for both Pre-Construction Reimbursables & General Conditions Reimbursables	Role	Name(s) of Proposed Key People for whom Rate will apply (**See Note Below)	Fully Burdened Base Hourly Rate (*See Note Below)		
			First Year (\$)	Second Year (\$)	Third Year (\$)
UMB LABOR CATEGORY					
CM Project Executive(s)			\$ -	\$ -	\$ -
CM Project Manager(s)			\$ -	\$ -	\$ -
CM Field Superintendent(s)			\$ -	\$ -	\$ -
CM PreCon Manager(s)			\$ -	\$ -	\$ -
Other: (specify)			\$ -	\$ -	\$ -

*Rates apply to task orders assigned/awarded during that period for the full duration of that task order.
 **Note: The name(s) provided for the key personnel positions MUST match those provided for evaluation in the firm's Technical Proposal.

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Sample Cost Proposal

CM Construction Fees & Project Costs

FIRM NAME: _____

Variable Fee Proposal (lump sum): State as a graduated percentage rate	
Base CM fee % for DTD up to \$1M	
Additional fee% for DTD between \$1M and \$4M	
Additional fee % for DTD between \$4M and \$9M	
Additional fee % for DTD \$9M and up (Expected \$25M)	
Fee/Markup to be charged on self-performed work:	
Insurance: unless otherwise noted, show as percentage of all other construction subtotal costs (each % will be applied directly to this subtotal)	
Insurance, including GL, Auto, and \$1M Pollution Liability	
Builder's Risk Insurance	
Pollution liability of \$5m (required if remediation, etc.)	
Payment/Performance Bonds	
Subcontractor Default Insurance, if applicable (as % of trade \$)	
Estimated General Conditions for Project	Project Specific
Estimated CM Contingency for Project	Project Specific

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SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

Sample Cost Proposal - Stratification

Variable Fee Proposal (lump sum): State as a graduated percentage rate		
Base CM fee % for DTD up to \$1M		
Additional fee% for DTD between \$1M and \$4M		
Additional fee % for DTD between \$4M and \$9M		
Additional fee % for DTD \$9M and up (Expected \$25M)		

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SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

Sample Cost Proposal - Stratification

Variable Fee Proposal (lump sum): State as a graduated percentage rate		
Base CM fee % for DTD up to \$1M		5%
Additional fee% for DTD between \$1M and \$4M		1%
Additional fee % for DTD between \$4M and \$9M		1%
Additional fee % for DTD \$9M and up (Expected \$25M)		1%

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SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

Sample Cost Proposal - Stratification

Project Construction Cost Budget (DTD):

\$ 2,000,000

CM Construction Services Fee	Portion of Budget Applied	%	\$
Variable Fee Proposal (lump sum): State as a graduated percentage rate			
Base CM fee % for DTD up to \$1M	\$1,000,000	5%	\$ 50,000
Additional fee% for DTD between \$1M and \$4M	\$1,000,000	1%	\$ 10,000
Additional fee % for DTD between \$4M and \$9M	\$ -	1%	\$ -
Additional fee % for DTD \$9M and up (Expected \$25M)	\$ -	1%	\$ -
	\$2,000,000		\$ 60,000

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SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

Sample Cost Proposal - Stratification

Project Construction Cost Budget (DTD):

\$ 8,000,000

CM Construction Services Fee	Portion of Budget Applied	%	\$
Variable Fee Proposal (lump sum): State as a graduated percentage rate			
Base CM fee % for DTD up to \$1M	\$1,000,000	5%	\$ 50,000
Additional fee% for DTD between \$1M and \$4M	\$3,000,000	1%	\$ 30,000
Additional fee % for DTD between \$4M and \$9M	\$4,000,000	1%	\$ 40,000
Additional fee % for DTD \$9M and up (Expected \$25M)	\$ -	1%	\$ -
	\$8,000,000		\$ 120,000

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SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

Final Proposal Rating and Award

- Based on all submissions
- Technical merit has much greater weight
- Proposals which best serve the interest of the University
- The successful firms will sign the University's Standard contract documents (Attachment B)

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Forms & Attachments

- ATTACHMENT A: Technical Proposal Forms
- ATTACHMENT B: Contract Forms
- ATTACHMENT C: (Intentionally Omitted)
- ATTACHMENT D: UMB Shop Drawings/Submittal Flow Chart (To be issued to successful CM firms)
- ATTACHMENT E: (Intentionally Omitted)
- ATTACHMENT G: Sample Cost Proposal Forms
- ATTACHMENT H: MBE Forms
- ATTACHMENT I: University Standard General Conditions
 - Section 00700: UMB Standard General Conditions
 - Section 00800: Amendments to UMB Standard General Conditions for USM Institutions in the Baltimore Region
 - Prevailing Wage Rates (to be issued to successful CM prior to trade bidding)
- ATTACHMENT J: Solicitation Terms And Conditions
- DOCUMENTS PACKAGED SEPARATELY:
 - Design & Construction Documents Procedures / Standards / Guidelines
 - Addenda (on eBid Board)

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Forms & Attachments

- ATTACHMENT F: On Call Task Order Forms
 - Cost proposal for task orders (To be issued to successful CM firms)
 - Apprenticeship Training Fund Verification Contractor Affidavit
 - Performance and Payment Bonds Form
 - Apprenticeship Training Fund Verification Subcontractor Affidavit
 - MBE Attachment H-1A (Part 3 & 4) Participation Schedule submitted with each task order for PreCon & GMP
 - Performance and Payment Bonds (if the project is over \$100,000) submitted with GMP and applicable change orders
 - MBE Attachment H-2 Outreach Efforts Compliance Statement submitted with each task order GMP
 - MBE Attachment H-3A Subcontractor Project Participation Certification submitted with each task order for PreCon, GMP, & change order
 - MBE Attachment H-3B Prime Contractor Project Participation Certification submitted with each task order for PreCon, GMP, & change order
 - Subcontractor Affidavit, Apprenticeship Training Fund Verification
 - MBE Attachment H-4A Submitted monthly by the prime contractor
 - MBE Attachment H-5 Submitted monthly by the MBE subcontractor
 - MBE Annual Inventory reporting by the prime (To be issued to successful CM firms)
 - MBE Compliance Assessment Report (To be issued to successful CM firms)

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KEY POINTS TO REMEMBER

- Pay special attention to the new proposal submission requirements in the RFP.
- Questions must be submitted in writing via email to cblair@umaryland.edu
- Follow directions in the RFP
- Addenda, Q&A, and other documents will only be published on the UMB eBid Board at www.umaryland.edu/procurement/ebid-board/.

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KEY POINTS TO REMEMBER

- Attachment A forms are available in Word format on the UMB eBid Board
- MBE H-1A Part 2 must be in your Phase 1 proposal submission
- Addenda must be acknowledged with your submittal(s)
- Late proposals will not be accepted
- Set dates aside for oral presentations

