

### 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 | ut 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

### **SECTION 2: GENERAL INFORMATION**

### Solicitation Purpose

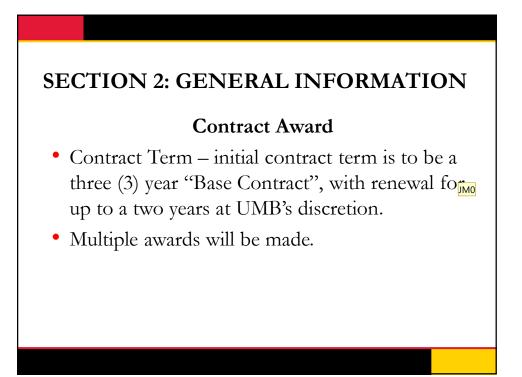
The purpose of the Request for Proposal (RFP or Solicitation) is for the University of Maryland, Baltimore (UMB) to procure On Call Construction Management at Risk Services for design and construction of various projects.

- Work primarily at UMB

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# SECTION 2: GENERAL INFORMATION Besponse 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

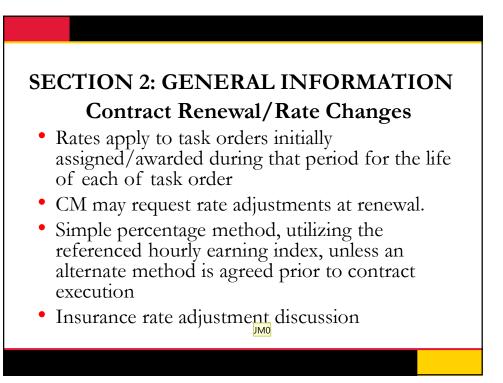




### **SECTION 2: GENERAL INFORMATION**

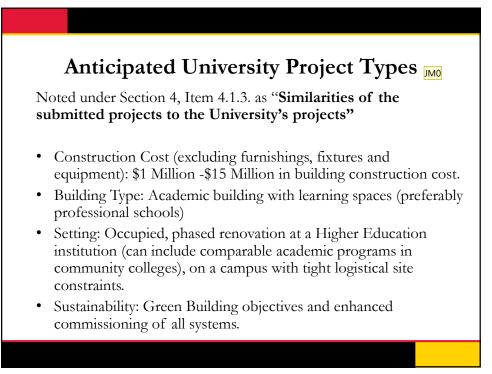
### **Contract Overview**

- 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



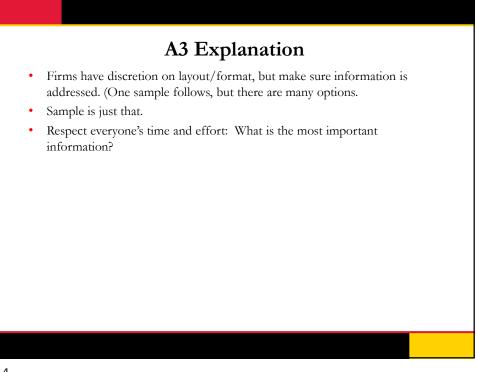
### SECTION 3: SCOPE OF SERVICES Project Development/Scope

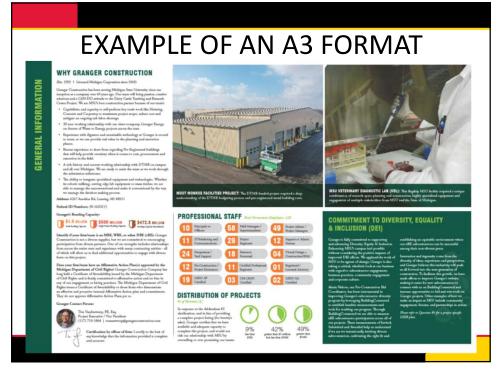
- Pre-Con CM Services Fee as a reimbursable to be billed against a NTE amount, or a University established allowance, at hourly labor rates
- The RFP includes an outline of the level of effort expected for Pre-Con and Construction Phase Services for informational purposes only
- Key elements of Pre-Con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

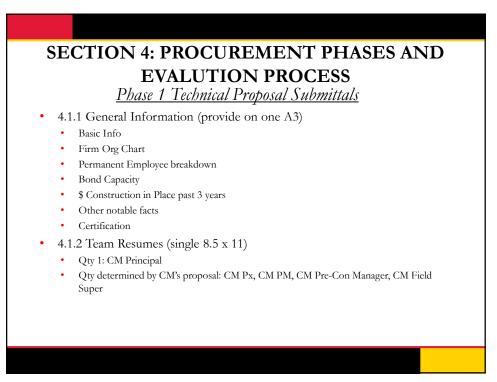


### SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

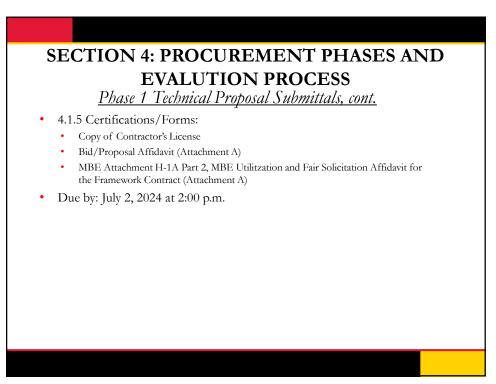
- 4.1 Phase 1 Technical Proposal
- 4.2 Phase 2 Technical Proposal & Oral Interviews
- 4.3 Technical Evaluations
- 4.4 Cost Proposal/Final Evaluations and Selection

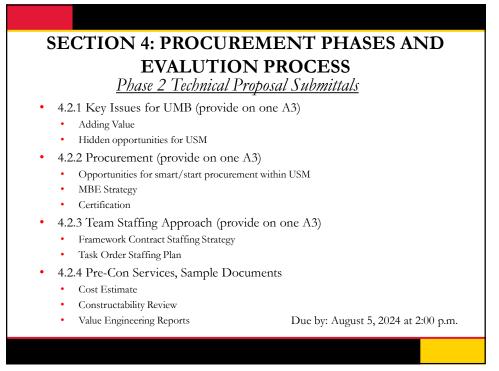


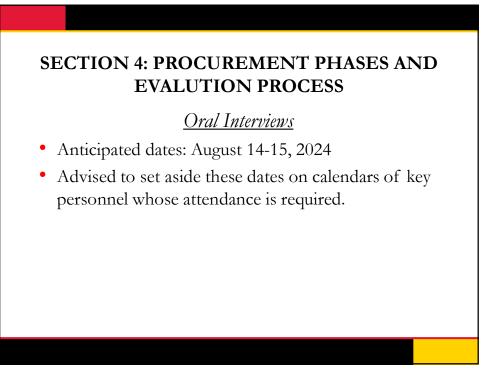




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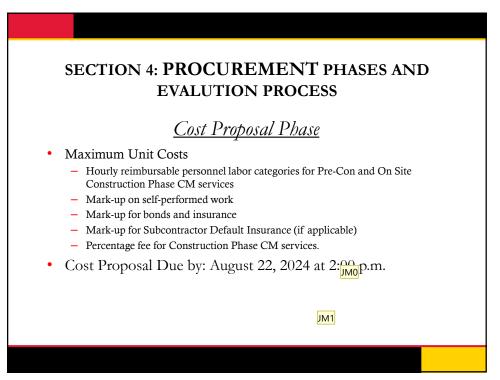


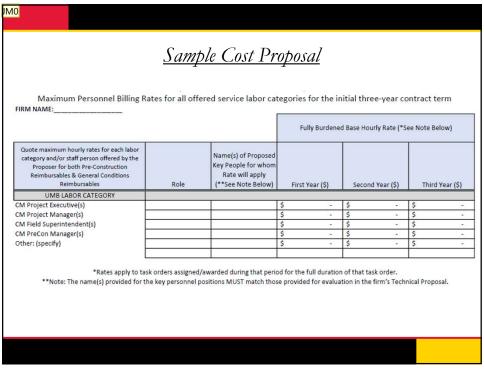


### SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

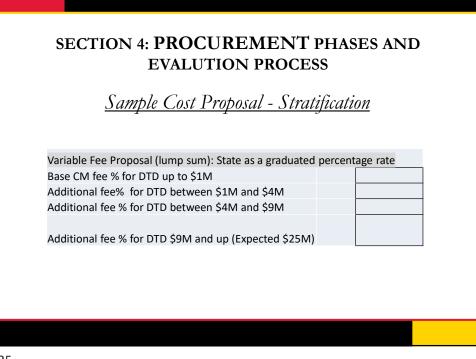
RFP 4.3 Technical Evaluation

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





| Sample Cost Prop   | ocal             |
|--|------------------|
| <u>Sample Cost Prope</u>   |                  |
| CM Construction Fees & Project   | Costs            |
| FIRM NAME:   |                  |
|  |                  |
| Variable Fee Proposal (lump sum): State as a graduated percer<br>Base CM fee % for DTD up to \$1M  | itage rate       |
|  |                  |
| 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   |                  |
|  |                  |
| construction subtotal costs (each % will be applied directly to t  | this subtotal)   |
| construction subtotal costs (each % will be applied directly to 1<br>Insurance, including GL, Auto, and \$1M Pollution   | this subtotal)   |
|  | this subtotal)   |
| Insurance, including GL, Auto, and \$1M Pollution  | this subtotal)   |
| Insurance, including GL, Auto, and \$1M Pollution<br>Liability   | his subtotal)    |
| Insurance, including GL, Auto, and \$1M Pollution<br>Liability   | his subtotal)    |
| Insurance, including GL, Auto, and \$1M Pollution<br>Liability<br>Builder's Risk Insurance   | his subtotal)    |
| Insurance, including GL, Auto, and \$1M Pollution<br>Liability<br>Builder's Risk Insurance<br>Pollution liability of \$5m (required if remediation, etc.)<br>Payment/Performance Bonds   | his subtotal)    |
| Insurance, including GL, Auto, and \$1M Pollution<br>Liability<br>Builder's Risk Insurance<br>Pollution liability of \$5m (required if remediation, etc.)  | Lis subtail      |
| Insurance, including GL, Auto, and \$1M Pollution<br>Liability<br>Builder's Risk Insurance<br>Pollution liability of \$5m (required if remediation, etc.)<br>Payment/Performance Bonds<br>Subcontractor Default Insurance, if applicable (as % of  | Lissubtal)       |
| Insurance, including GL, Auto, and \$1M Pollution<br>Liability<br>Builder's Risk Insurance<br>Pollution liability of \$5m (required if remediation, etc.)<br>Payment/Performance Bonds<br>Subcontractor Default Insurance, if applicable (as % of  |                  |
| Insurance, including GL, Auto, and \$1M Pollution<br>Liability<br>Builder's Risk Insurance<br>Pollution liability of \$5m (required if remediation, etc.)<br>Payment/Performance Bonds<br>Subcontractor Default Insurance, if applicable (as % of<br>trade \$)<br>Estimated General Conditions for Project | Project Specific |
| Insurance, including GL, Auto, and \$1M Pollution<br>Liability<br>Builder's Risk Insurance<br>Pollution liability of \$5m (required if remediation, etc.)<br>Payment/Performance Bonds<br>Subcontractor Default Insurance, if applicable (as % of<br>trade \$)   |                  |



| <u>Sample Cost Proposal - Stratification</u>                           |
|--|
|  |
| 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                          |
| Additional fee % for DTD between \$4M and \$9M                         |
| Additional fee % for DTD \$9M and up (Expected \$25M) 1%               |

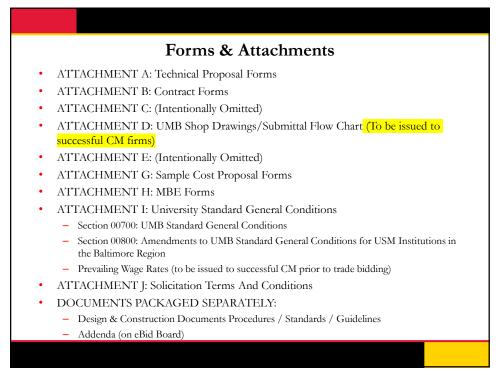
| SECTION 4: PROCUREMENT PHASES AND<br>EVALUTION PROCESS                 |                              |                 |                  |
|--|------------------------------|-----------------|------------------|
| <u>Sample Cost Propos</u>  | sal - Stratifica             | ation           |                  |
| Project Construction Cost Budget (DTD):<br>\$ 2,000,000                |                              |                 |                  |
| CM Construction Services Fee   | Portion of<br>Budget Applied | %               | Ś                |
| Variable Fee Proposal (lump sum): State as a graduated percentage rate | Suger, pp.ed                 | ,,,             | Ŷ                |
| Base CM fee % for DTD up to \$1M                                       | \$1,000,000                  | <mark>5%</mark> | \$ 50,000        |
| Additional fee% for DTD between \$1M and \$4M                          | \$1,000,000                  | <mark>1%</mark> | \$ 10,000        |
| Additional fee % for DTD between \$4M and \$9M                         | \$ -                         | <mark>1%</mark> | \$ -             |
| Additional fee % for DTD \$9M and up (Expected \$25M)                  | \$ -                         | <mark>1%</mark> | \$-              |
|  | \$2,000,000                  |                 | \$ <b>60,000</b> |

| SECTION 4: PROCUREMENT PHASES AND<br>EVALUTION PROCESS                 |                              |                 |                   |
|--|------------------------------|-----------------|-------------------|
| <u>Sample Cost Propos</u>  | al - Stratific               | <u>ation</u>    |                   |
| Project Construction Cost Budget (DTD):<br>\$ 8,000,000                | 5                            |                 |                   |
| CM Construction Services Fee   | Portion of<br>Budget Applied | %               | \$                |
| Variable Fee Proposal (lump sum): State as a graduated percentage rate |                              |                 |                   |
| Base CM fee % for DTD up to \$1M                                       | \$1,000,000                  | <mark>5%</mark> | \$ 50,000         |
| Additional fee% for DTD between \$1M and \$4M                          | \$3,000,000                  | <mark>1%</mark> | \$ 30,000         |
| Additional fee % for DTD between \$4M and \$9M                         | \$4,000,000                  | <mark>1%</mark> | \$ 40,000         |
| Additional fee % for DTD \$9M and up (Expected \$25M)                  | \$ -                         | <mark>1%</mark> | \$ -              |
|  | \$8,000,000                  |                 | \$ <b>120,000</b> |

### SECTION 4: PROCUREMENT PHASES AND EVALUTION PROCESS

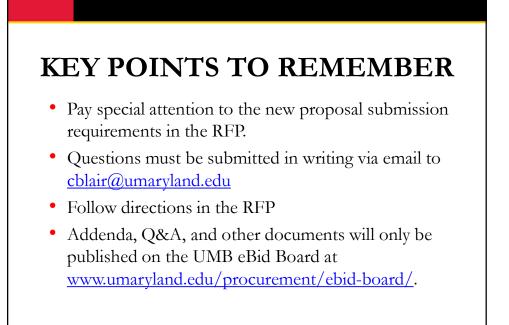
Final Proposal Rating and Award

- 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)



|      | Forms & Attachments   |
|------|---|
| • AT | TACHMENT 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)  |
|      |   |





## **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
- DON'T I FORGET!
- Set dates aside for oral presentations