

RFP 91166DM UMB ELEVATOR MAINTENANCE

Preproposal Meeting

January 16, 2025

11:00 AM

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- Objective of the Solicitation is to select a qualified **General Contractor** for the UMB ELEVATOR MAINTENANCE project.
- Solicitation prepared by UMB Construction and Facilities Strategic Acquisitions (CFSA)

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- Solicitation documents, including any addenda, are posted on UMB's electronic bid board at:

<https://www.umaryland.edu/procurement/ebid-board/>

- Issuing Office is sole contact for any questions related to the procurement
 - Daryl Moore daryl.moore@umaryland.edu

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- **Summary of Solicitation** – Responsibility of Proposers to familiarize themselves with the Solicitation and its requirements
 - Table of Contents
 - Solicitation Schedule
 - RFP Sections 00100-00400
 - Section 00700 Maintenance General Terms and Conditions dated December 2020 – issued as separate document
 - Attachments

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Solicitation Schedule Important Dates

- **Thursday, January 23, 2025**– Questions Due
- **Thursday, February 6, 2025 on or before 2:00 PM**
 - Technical Proposals **only** due
 - submitted electronically – refer to Section 00100 Paragraph F for email address for this submittal
 - File size is limited to 25 MB

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Section 00100:

This is a phased procurement:

- ❖ Technical Proposal
- ❖ Initial Technical Evaluation resulting in shortlist
- ❖ Oral Presentation/Interviews (optional) with shortlisted Proposers
- ❖ Second Phase Technical Evaluation resulting in final shortlist
- ❖ Price Proposal from final shortlisted Proposers

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- Attachment I – Procurement Terms and Conditions

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- Section 00200
 - List of Contract Documents
 - Attachment C – Maintenance Contract and Forms

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- Section 00300 – Procurement Process
 - Article 1 – Summary of Procurement Phases and Technical Proposal Requirements
 - Article 2 – Initial Evaluation of Technical Proposals
 - Article 3 – Oral Presentation/Interview Sessions (optional)
 - Article 4 – Price Proposals and Final Evaluation

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Technical Proposal Criteria
(listed in order of importance)

- Forms are in Attachment A – issued as separate WORD file
- KEY PERSONNEL- Within this category, the named positions are defined below. These Key people must be direct employees of the bidding firm:

Key Personnel – CONTRACT MANAGER

- **CONTRACT MANAGER:** This person will be responsible for the overall management of this contract and be the prime contact person for the University. This person may also provide onsite management as needed: reviewing the project in the field when required with a University representative and/or be the channel for inquiries concerning work in progress or work to be started under this contract. The University will accept only one (1) person in this role.

Key Personnel – LEAD MECHANIC

LEAD MECHANIC: Is an elevator mechanic, licensed by Maryland DLLR who is a direct employee of the bidding firm. The lead mechanic will be on site to supervise all scheduled work and is responsible to ensure that work is completed competently and in a timely manner. Lead elevator mechanic must have a minimum of 5 years' experience as an elevator mechanic. Firm may submit no more than one (1) person for this position.

Key Personnel – ELEVATOR ADJUSTOR

- **ELEVATOR ADJUSTOR:** Is a senior troubleshooter, licensed by Maryland DLLR as an elevator mechanic, who is a direct employee of the bidding firm. The elevator adjustor must have a minimum of 10 years' experience as an elevator mechanic with at least a minimum of 5 years in the elevator adjustor role. Firm may submit no more than one (1) person for this position.

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- Firm Experience – Complete the Proposer's Firm Experience & Reference Form for Elevator Maintenance Contracts/Projects (found in Attachment A), for three (3) contracts/projects, which have been successfully completed within the past five (5) years from issue date of bid, which are similar to work, size and complexity to be performed under this Elevator Maintenance contract.
- In order to be considered as experience, the three (3) contracts/projects given, as similar to work, size and complexity as described herein, and must be completed by the bidding firm.
- Please Note: If your firm is a local office of a parent company, such experience must be performed by the local firm in order to be considered.

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- References The references of customers of previous similar work will be checked by the University. All references should include a contact person who can comment on your firm's ability to do similar work.
- NOTE: It is imperative that contact names and phone numbers be given for the projects listed and be accurate. In addition, the University reserves the right to check other sources available. The University will hold references in the strictest of confidence.

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FIRM EQUIPMENT EXPERIENCE:

Elevator Contractor shall submit documentation defining its experience with providing maintenance on equipment that is similar to the installed equipment at the UMB Campus.

Proposal should include emphasis on similar make and models, refer to Section U for listing of elevators at UMB. Please provide manufacturer certifications where applicable. Number of units under maintenance that are of the same type of equipment as listed below:

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- a) Virginia Controls
- b) ThyssenKrup
- c) Otis
- d) Dover
- e) Hollister Whitney
- f) KONE/Montgomery

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- STATEMENT OF APPROACH:
- Provide a detailed but concise, overall description (developed in response to this bid) of how the Contractor(s) Key Personnel (defined as Contract Manager, Lead Mechanic and Elevator Adjustor) will be organized and managed and how work will be performed per the scope of services/work contained in the bid documents.
- The information to be provided under this category is to include, but not limited to, the following:

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- a. A description of how your firm will respond quickly to the University for Elevator operation, repairs, adjustments, emergency service, preventive maintenance, testing services and inspection services work under this contract, from the initial call/request throughout the completion of the project;
- b. A discussion of your Key Personnel's approach to coordinating all work including how your firm plans to provide project management of the task orders in order to minimize disruption to the University, students, staff and faculty when providing services under this Elevator Maintenance Contract; and,
- c. Particular challenges which these Projects present and how the Bidder would address these challenges.

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- COMPANY PROFILE and ANNUAL SALES:
- Complete the Company Profile Form with Annual Sales Form (found in Attachment A) included in the solicitation documents. Please be sure to include a brief, but informative, history of your firm including bonding capacity.

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- Forms:
 - Bid/Proposal Affidavit
 - Acknowledgement of Receipt of Addenda

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Article 2 – Initial Evaluation

- In general, proposals submitted in response to this Solicitation must demonstrate that the firms and, in particular, the project team will have:
 - a. Experience that clearly demonstrates the proposer's and Key Personnel knowledge of, and ability to, successfully perform work similar to that contemplated by these specifications. Higher consideration will be given for experience involving projects most similar to the project proposed by this RFP, in terms of size, scope, setting, and complexity. Ability to deliver projects on time. Ability to deliver projects within cost established at award. Projects provided in an occupied setting, preferably in an Higher Education setting.

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- Higher consideration will be given to project approaches that are clear and demonstrate that the contractor understands the University's project, the schedule, and challenges.
- Higher consideration will be given to proposers whose company profile, and current workload illustrate that the proposer has the resources available to successfully complete the University's projects on time.
- Will result in shortlist of best technically qualified proposers
- Only shortlist will advance to the next phase

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Oral Presentation (optional)

-Friday March 7, 2025

The University will contact only the shortlisted Proposers to schedule an Oral Presentation/Interview Session (“Interviews” or “Oral Presentations”) with the University, either in person or remotely, whichever is deemed to be in the best interest of the University. Only those Proposers who are shortlisted as a result of the initial technical evaluation will be requested to attend an Interview.

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- Second Phase Technical Evaluation
 - Based on Technical Proposals and Oral Presentations (Interviews)
 - All criteria will be re-evaluated
 - References will be incorporated for both GC's Key Personnel and Firm
 - Same order of importance
- Second shortlist results
- Final Shortlist will be ranked

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- **Price Proposal** — (anticipated to be due Monday, March 24th, 2025)
 - Only final shortlist will submit a Price Proposal
 - Site Walk Through for final shortlisted Proposers and their subcontractors is anticipated to be held Week of March 12, 2025, time TBD

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- Final Evaluation:
 - Technical merit weighs greater
 - Final ranking based on the second technical evaluation and price proposal evaluation
 - UMB will choose from amongst the highest rated proposals that which will serve its best interest.
 - UMB may negotiate or modify any element of the proposal evaluation process.
 - UMB may award with or without negotiations

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Section 00400 – Scope of Work

- The Project consists of providing all labor, materials, equipment, supplies, permits, supervision, subcontracting and other resources as required to provide for operation, repairs, adjustments, emergency service, preventive maintenance, testing services and inspection services on a “Time and Material” basis for all Elevators at the University of Maryland, Baltimore and any University owned property as directed by the University Elevator Manager or another designated University Facilities Maintenance (FM), Operation and Maintenance (OM) employee as designated by the Associate Director for OM Electrical Shop.

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- Section 00700 – UMB's General Terms and Conditions for Maintenance dated December 2020 (new)
- Contract award is anticipated to be April 1, 2025

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QUESTIONS????