DATE: January 30, 2015

TO: All Prospective Proposers

FROM: Valerie Rolandelli
Associate Vice President
301-985-7895

RE: RFP 91268 – Facilities and Equipment Maintenance
Addendum #5 dated 01/30/2015

The following amends the above referenced RFP documents. Receipt of this addendum is to be acknowledged by completing the enclosed "Acknowledgement of Receipt of Addenda Form" and including it in the Technical Proposal. As well, the addendum number and date should be noted in the appropriate space on the Price Proposal form.

1. A pre-proposal meeting was held yesterday, January 29, 2015. A summary of the Solicitation documents was provided (See revised Power Point handout attached to this Addendum 5. Revisions are in ‘red’.) In addition, a tour of UMUC’s Academic Center, Largo II, Administration, and Conference Center and Hotel was conducted.

2. A list of the attendees at this pre-proposal meeting is attached to this Addendum 5.

3. A Revised Transmittal Letter (in Word and in pdf format) is attached to this Addendum 5. Revisions are in red. This Revised form replaces the Transmittal Letter issued in Appendix A of the Solicitation Document.

4. Responses to the questions asked at the pre-proposal meeting are attached to the updated Solicitation Questions/Issues Log.

5. Any further questions from potential Proposers are to be provided in the format of the Question/Issues Log. We appreciate your cooperation in using a standard format.

6. The due date and time for the Initial Technical Proposal REMAINS as Tuesday, February 10, 2015, on or before 5:00 p.m. Proposals must be delivered to the Issuing Office per Section I, Paragraph 2 of the solicitation document. Refer also to Section I, Paragraph 6 of the solicitation document for further information about the Proposal Closing Date/Due Date and Time. Late proposals cannot be accepted.

End of Addendum 5 dated 01-30-2015
ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA FORM

RFP NO.: 91268

INITIAL TECHNICAL PROPOSAL DUE DATE:
Tuesday, February 10, 2015 on or before 5:00 pm EDT

RFP FOR: FACILITIES AND EQUIPMENT MAINTENANCE

NAME OF PROPOSER: __________________________________________

ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

The undersigned, hereby acknowledges the receipt of the following addenda:

Addendum No. 1       dated 01-20-2015
Addendum No. 2       dated 01-22-2015
Addendum No. 3       dated 01-26-2015
Addendum No. 4       dated 01-28-2015
Addendum No. 5       dated 01-30-2015
Addendum No. ______  dated ______
Addendum No. ______  dated ______
Addendum No. ______  dated ______

As stated in the RFP documents, this form is included in our Technical Proposal.

________________________________________
Signature

________________________________________
Name Printed

________________________________________
Title

________________________________________
Date

END OF FORM
REQUEST FOR PROPOSAL
RFP # 91268
FOR
Facilities and Equipment Maintenance
UNIVERSITY OF MARYLAND
UNIVERSITY COLLEGE
January 29, 2015
(Revisions in ‘red’ based on pre-proposal meeting)
Solicitation Schedule

• Key Dates associated with the solicitation can be found on page 3 of the Solicitation
  – Questions are due: February 3, 2015
  – Technical Proposals are due: February 10, 2015 on or before 5:00 pm
  – Discussion Sessions with shortlisted firms will be held March 5 and/or 6, 2015
Section I
General Information

• Summary

• Issuing Office – all questions to be directed to Valerie Rolandelli at valerie.rolandelli@umuc.edu and Beth Kirk at beth.kirk@umuc.edu and Vera Jones at vera.jones@umuc.edu

• Due Date/Number of copies – February 10, 2015, by 5:00pm (Original and 7 copies and 1 CD/flashdrive); Late proposals cannot be accepted.

• Minority Business Enterprise 25% with subgoals of 8% African American; 3% Hispanic; and 3% Asian American
Section I – General Information continued

• Term of Contract
  – 3 year initial term (anticipated to be 9/1/15 – 8/31/18)
  – Renewal options not to exceed a cumulative total of nine additional years at sole option of UMUC

• Contract Form – Appendix C – to be issued by addendum

• Acceptance of Terms and Conditions

• Proposal and Performance Security

• Confidentiality of Proposer’s/UMUC’s Information (See Appendix S, Paragraph 11, proposers cannot deem their entire proposal confidential.)
Section II
Scope of Work/Requirements

• Scope of Services
  – Background
  – Description of the Facilities
  – Required Facilities and Equipment Maintenance Services
  – Staffing
  – Primary Requirements
  – Specific Functional Requirements
  – Insurance
Section III – Article 1
Technical Proposal Submittal
Due February 10, 2015 by 5 pm

1) Transmittal Letter (sample in Appendix A)
2) Executive Summary
3) Detailed responses to Technical Proposal Criteria (4)
4) Bid/Proposal Affidavit Form
5) Insurance
6) Acknowledgement of Receipt of Addendum Form
7) Acknowledgement of Review of UMUC Contract
8) MBE Attachment M-1A – MUST BE INCLUDED; NON-CURABLE
Technical Criteria

1. Staffing Requirements/Key Personnel/References
   1.1 Narrative Describing Plan for Management and Staffing

   Organization
   Job Descriptions
   Positions that are available within firm/positions that will require hiring of staff
   Staffing Levels
   Training of Staff
   Sample Shift Schedule
Technical Criteria, continued

1.2 Key Personnel: Submit resume on
   a) Executive Point of Contact (PM’s direct supervisor)
   b) Project Manager (UMUC’s primary point of contact) – 100% of time
   c) Engineering Supervisor – 100% of the time
   d) Two (2) Lead Engineers - 100% of time

1.3 References of Project Manager, Engineering Supervisor, and the two Lead Engineers

Note: Key People will be evaluated based on their demonstrated background, knowledge, and expertise in facilities and equipment maintenance contracts similar to UMUC’s scope requirements.
Technical Criteria, continued

2. Approach to Providing the Scope of Services
   - Questionnaire
   - Table of Maintenance/Service Tasks

3. Firm Experience/Firm References (3 Contracts) (2 must be onsite operations)
   3.1 Provide:
      a) Client Name & Location
      b) Client Contact Person and Phone Number
      c) Dollar amount of contract
      d) Informative Description of Services provided
      e) Proposer’s Project Manager, Lead Engineer, and Executive Point of Contact assigned to the contract
      f) Term of Contract (Start and End Dates)
      g) Similarities to the UMUC Contract
Notes regarding References

- References are to be Owner/Client References, not employment references
- Accurate contact names and phone numbers and email addresses are to be provided
- Contact able to speak to performance of firm and/or capabilities of the Key Person on a regular basis
- UMUC reserves the right to check any other references including past performance with UMUC
- References are to be from different contracts
- UMUC intends to contact references of only the short-listed firms
- UMUC reserves the right to further shortlist or to progress to the Price Proposal Phase prior to checking or incorporating such references into evaluation
- UMUC holds references in the strictest of confidence
Technical Criteria, continued

4. Company Profile
   • Company address(es), location(s), and size
   • Address of the office that will be servicing UMUC
   • History of firm
   • Number of employees in the firm and total number of employees in the office (by job position) that will be servicing UMUC
   • Total number of anticipated employees for the contract for UMUC
   • Services company provides/company’s area of expertise
   • Number of onsite facilities and equipment maintenance operated
   • Number of a) higher education and b) conference center clients
   • Annual sales volume
   • Financial attestation (one copy is sufficient)
Other Documents - Technical Proposal Submittal

• Procurement Forms
  – Bid/Proposal Affidavit
  – Insurance Certificate
  – Acknowledgement of Receipt of Addendum
  – Acknowledgement of Review of UMUC Contract
  – Minority Business Enterprise Attachment M1-A (if this is not submitted, UMUC shall not consider response; per Maryland law this is non-curable.)
Technical Proposal Evaluation

1.1 Review for compliance with mandatories
1.2 Evaluated by committee established by the University
1.3 Initial Technical Evaluation

- Order of Importance:
  - Staffing/ Key Personnel
  - Approach to Contract
  - Firm Experience
  - Firm Profile

Short-list to be established; must be short-listed in order to advance in procurement
Only those Proposers who are short-listed based on the initial technical evaluation will be asked to attend an Oral Presentation/Discussion Session.
Oral Presentation/Discussion Session (continued)

• Anticipated on March 5 and/or 6, 2015. This date is to be set aside in its entirety on Project Manager’s, Engineering Supervisor’s, two Lead Engineers’, and Executive Point of Contact’s calendars (anticipate notification 2/20/15)

• Purposes:
  – Meet Proposer’s Key Personnel and to have these key people convey their expertise and experience in facilities and equipment maintenance;
  – Discuss all aspects of initial technical submittal, especially approach and staffing of contract specifically for UMUC.
  – To clarify scope of services, if needed
Second Technical Evaluation

- Second Phase Technical Evaluation to be conducted after the Oral Presentations
- Same order of importance for technical criteria
- UMUC intends, but is not required to, incorporate references of the Firm and the proposed Key People
- Further shortlists may result as the procurement progresses
- Once a final shortlist is established, UMUC will rank the technical proposals from highest to lowest
Section III, Article 3
Price Proposal

Only the shortlisted firms following the technical evaluation will be requested to submit a Price Proposal

Price Proposal

– Anticipate notification by UMUC by 3/10/15
– Anticipate due date of week of March 16-20, 2015
– Sample format is in Appendix B, however, the format is expected to evolve
– MBE Attachment M1-B – required, if not provided will be considered “not reasonably susceptible of award”; this is non-curable
– 5% Bid Bond
Evaluation of Price Proposals (Cont’d)

– Price Proposals will be opened privately and will be evaluated based on total cost for initial contract term
– Discussions may be held; BAFO’s may be requested;
– Price Proposal will be ranked lowest to highest total offers
– Prices will be firm for initial term of contract
– Contractor may request a price increase for Renewal terms, if any, by April 1st of each calendar year.
Section III, Article 4
Final Evaluation

- Committee will rank proposals based on combination of technical and financial criteria with technical weighing greater and recommend award to Procurement Officer
- Most advantageous overall proposal will be selected by UMUC
- One or more contractors may be selected to further engage in negotiations
Contract Award

- Recommended Contractor will need to execute UMUC’s Contract
- Board of Regents approval is required
- Award anticipated by 6/30/15
- Contract start is anticipated to be 9/1/15;
Appendices

• Appendix A – Technical Proposal Forms
• Appendix B – Price Proposal Forms
• Appendix C – Contract Forms
• Appendix D – Equipment List and tool Inventory
• Appendix M – MBE Program Information
• Appendix M-W – MBE Waiver Information
• Appendix S – Solicitation Terms and Conditions
Request for Proposal
RFP# 91268

Questions?
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<th>Email</th>
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<td>Adock Systems</td>
<td>Steve Tiner</td>
<td><a href="mailto:s.tiner@adocksystems.com">s.tiner@adocksystems.com</a></td>
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<td>Marlow Huff</td>
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<td>Paul Estes</td>
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<td>Adam Oliver</td>
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<td>CEEPCO</td>
<td>Noel Phipps</td>
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<td>CEEPCO</td>
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<tr>
<td>Meridian Property Services, Inc.</td>
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<td>ProSource Consulting</td>
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<td>Stevenson’s Janitorial Service, LLC.</td>
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End of Attendee’s List
REVISED TRANSMITTAL LETTER - TECHNICAL PROPOSAL
RFP 91268 – Facilities and Equipment Maintenance

PROPOSER: ____________________________________________________
Federal Identification Number/Social Security Number: ______________________
Address: ____________________________________________________________

DATE ______________________

The undersigned hereby submits the Technical Proposal as set forth in RFP #91268 dated January 7, 2015.

We confirm that this Technical Proposal is based on the Requirements per the RFP and any subsequent addenda.

In accordance with Section III, Proposal Requirements, Article 1, we are enclosing the following in our Technical Proposal:

1. Staffing of the Contract/Key Personnel
2. Approach to Providing the Scope of Work
3. Firm Experience
4. Company Profile
5. Bid/Proposal Affidavit (completed)
6. Acknowledgement of Receipt of Addenda form
7. Acknowledgement of review and acceptance of UMUC Sample Contract in Appendix C
7. MBE Attachment A (This must be included in the Technical Proposal. If we do not include this Attachment A, we affirm that UMUC shall declare our proposal not-susceptible of the award. We understand that this is NON-CURABLE.)

We confirm that in the event we are shortlisted for this procurement, our proposed Executive Manager, Project Manager, the Engineering Supervisor, and the two (2) Lead Engineers are available to attend a discussion session on either Thursday, March 5, 2015 or Friday, March 6, 2015. We understand that these will be scheduled at the convenience of UMUC and that we will not be able to choose a time or date.

Authorized Signature to bind firm to Offer: Contact name and information for Proposal contents:

Printed Name: ____________________________
Signature: ________________________________
Title: ________________________________
Date: ________________________________

Name: ____________________________
Title: ________________________________
email:______________________________
Direct dial phone number ____________________________

Extension number (if applicable) __________