RFP 20-006
JOB ORDER CONTRACTING (JOC) SERVICES

PRE-PROPOSAL MEETING
THURSDAY, APRIL 9TH, 2020
VIA SKYPE
PRE-PROPOSAL MEETING AND TOUR

- 10am Pre-Submittal Meeting via Skype
  - General Information
  - Project Information
  - Security Clearance
  - RFP Requirements
  - Submission of Proposals
  - Self-performing HUB Plan and HUB Subcontracting Letter (both documents must be submitted)
UTMB Project Teams

Project Management

• Chuck Anderson, Program Director

Procurement

• Shanna Watts, Sr. Acquisition Specialist, Purchasing for Capital Construction

Supplier Diversity Programs

• Karen Gross, Manager Supplier Diversity/HUB Program
# Pre-Proposal Meeting and Site Inspection

**Attendance**
- Not Mandatory, but encouraged

**Attendees**
- Must email shwatts@utmb.edu to verify attendance in today’s online meeting.
- All documents will be Posted and Emailed to those who are considered attendees.

**RFP Documents**
- UTMB Bid Opportunities Website [http://www.utmb.edu/supplychain/purchasing/bidops.asp](http://www.utmb.edu/supplychain/purchasing/bidops.asp)

**Addenda**
- Posted to Website
- Notice Emailed to Attendees

**RFP Due Dates**
- Bid Proposals – Thursday May 7, 2020 by 3:00pm CST
- State of Texas Self-performing HUB Plan and HUB Letter of Commitment must be signed and included with your proposal
This RFP consists of awarding two separate contracts:

- **Primary JOC Contractor** – This contractor will receive all JOC work requests.
  - Two (2) Year contract, with;
  - Three (3), one (1) year options
  - Contract Cap Amount will be $37.5 Million over 5 years

- **Secondary JOC Contractor** – This contractor will be used at the sole discretion of UTMB in accordance with the requirements of the RFP and its attachments.
  - Two (2) Year contract, with;
  - Three (3), one (1) year options
  - Contract Cap Amount will be $2.5 Million over 5 years
  - Secondary contractor may **not** be called upon unless approved by Owner
These JOC Contractor(s) will be qualified to support services for:

*Minor Construction, Repair, Rehabilitation and/or Alteration Projects*

To be performed on a non-exclusive, indefinite quantity basis, as requested by UTMB in accordance with the terms, conditions and requirements set forth in the RFP for UTMB’s multiple campuses.

**Contractor must have JOC Experience in all the following categories:**

*Healthcare, Academic, Research & Business*

**No Minimum Amount of Work is Guaranteed**

**Dates to Remember:**

- April 15\(^{th}\) - Questions due by 3pm, CST
- May 7\(^{th}\) – Proposals, Self-performing HUB Plan and HUB Letter of Commitment - due by 3pm, CST
- End of June, 2020 – Anticipated Contracts
Price Proposal shall be submitted in the form of a Co-Efficient per Appendix 3, Pricing Information and Methodology.

Co-Efficient shall include but not limited to:

**Coefficient:** The Coefficient shall include, but not be limited to: General and Administrative costs, Overhead and Profit, Insurance, Protective Gear and Clothing, Contingencies such as Wage Rates and Inflation, Bond Premiums, Taxes (except as allowed below), General Contractor’s Mark-up, Travel expenses, Parking, Field and Office supervisors and assistants, including safety and scheduling personnel, Scheduling of Work, Use of small tools, personal protective equipment, field office and related expense, Negative air machines, Manometers (except for set up, take down costs and associated maintenance) field engineering and layout, daily cleaning, preparation of reports, correspondence and documentation and/or other incidental job burdens to accomplish work. Coefficients are proposed by Contractors as a percentage increase, (e.g. 1.10) or decrease (e.g. 0.95) to the RSMeans Bare Cost, in association with performance of a Job Order. The coefficient(s) proposed and accepted are incorporated in the awarded contract and are used in establishing the price for individual orders. **Contractor shall price using 1.0 in lieu of the Galveston City Index (84.5%) listed in RSMeans.**
Applicable RSMeans Divisions:

The following Categories in RSMeans, Division 01 shall be excluded unless otherwise pre-approved by Owner:

**AWARDED CONTRACTOR**

Given the nature of JOC, there is not an immediate scope of work to respond to, and therefore bidders must be prepared and if identified as the Successful awarded Contractor, will be expected to:

- Follow all Security Clearance/badging requirements in accordance to the rules identified in the Security Clearance section of the RFP, also mentioned in this presentation.

- Complete full HUB requirements in accordance to the rules identified in the RFP for any JOC scopes of work that require a HUB plan, also mentioned in this presentation.

- Must be willing to establish an office in Galveston County within the first six months of contract award. This is an effort to be available to the Owner and its customers who reside on any UTMB campus.
SECURITY CLEARANCE

GC and subcontractors will be required to obtain a security clearance check and badges for all employees and subcontractors working on site.

Badging process involves paperwork, background and drug tests.

Pre-Check will be used by General Contractor for its employees that require building access - $36.50 per individual.

FC Construction Services will be used by General Contractor and Subcontractors for its employees that do not require building access – $125.00 per individual.

Pre-Check and FC Construction Services Background Check may include the following:

- Valid US Federal or State Government-issued picture ID card
- Verified social security number
- National Sex Offender List Check
- Excluded Parties or Terrorist Watch List Check
- No felony convictions within the past seven (7) years relating to theft, violence or drugs
- No Misdemeanor convictions within the past five (5) years relating to theft, violence or drugs
- No positive drug test results
RFP Section 1 – Item 1.4

- All questions must be submitted in writing
- Addendum will be issued for any clarifications and interpretations that materially affect or change the RFP requirements or specifications
- Attendees (those of you checking in today) will receive a courtesy email with any Addendum to this RFP. However, everyone is responsible for obtaining the official documents from the UTMB Bid Opportunities website as mentioned in the next bullet.
- Notice of Addendum will be posted on the UTMB Bid Opportunities website [http://www.utmb.edu/supplychain/purchasing/bidops.asp](http://www.utmb.edu/supplychain/purchasing/bidops.asp)
- Interpretations or clarifications in any form other than Addendum, including oral statements, will not be binding on UTMB and should not be relied on in preparing Proposals
RFP Section 1
Submission of Proposals

RFP Section 1 – Item 1.5

- Method of delivery – Email – Max size of 10MB
- E-Mail Address: vendor.bids@utmb.edu

Proposals Due: Thursday, May 7, 2020 by 3PM CST
HUB* Due: with Proposal, Thursday, May 7, 2020 by 3PM, CST

*State of Texas Self-performing HUB Plan & HUB Letter of Commitment
**Submission of Proposals**

- **In light of COVID-19**, we will **not** accept a hand delivered or mail/couriered proposal package.

- If your firm is unable to submit via email, please contact us immediately at **shwatts@utmb.edu** to set up a delivery schedule to accept your proposal.

- Official time clock for E-Mail submittals shall be the date and time specified on the email received by UTMB.
JOC #20-006 HUB Plan Submittal Requirements

Submittals:

- State of Texas Self-performing HUB Plan and the Letter of HUB Commitment.

Letter:

- Take the Letter of HUB Commitment and place it on your company letterhead.
- Be sure to complete the letter in its entirety. Do no leave any spaces/areas blank

Self-performing Plan:

- Complete Sections 1, 2, 3 and 4.
- Section 1 – all fields except TX VID #
- Section 1 c - place the JOC # 20-006
- Section 3 – state that your firm understands that the self-performing plan is for the purposes of this bid submittal and that your firm will comply with the State of Texas Good Faith Effort Requirements as requested.
- Section 4 – Signature of the individual who signs the execution of offer

Slides 15-17:

- Are only an example of the Method B HUB Plan that will be required as the scope of work is defined for Projects exceeding $85,000 under this JOC Agreement and your firm determines it will be subcontracting. Method B is how a firm shows a good faith effort to solicit from State of Texas certified HUB suppliers.
(HUB) Subcontracting Plan (HSP) Requirements

• In accordance with Texas Government Code 2161, each state agency, including UTMB, is required to make a good faith effort to assist HUBs in competing for, and receiving, contracts awarded by the agency.

• UTMB has reviewed this solicitation in accordance with Chapter 1, Texas Administrative Code, Section 20.285 (a) and has determined that subcontracting opportunities are probable under this solicitation.

• The individual preparing and/or signing the HSP document in Section 4 is responsible for the requirements of completing a compliant HUB Subcontracting Plan.

• The individual listed in Section 1 will be contacted if information is required during HSP evaluation.
Method B of the HUB Subcontracting Plan is the **ONLY** acceptable Method for **Competitive Sealed Proposals**.

There is a checklist to follow for the Method B process. Please follow the checklist in the HUB Plan package.

**Only use UTMB’s HUB Plan document** – UTMB’s *agency information will appear in the agency box on page 1 of the HSP Plan and dated 02/17; no other HUB Plan document will be accepted.*

If your company is certified as a State of Texas HUB firm and your company is bidding as a **prime contractor** you must complete a HUB subcontracting Plan. There are no exceptions; it is a state requirement.

Good Faith Effort Method B (Attachment B) – Complete an Attachment B for each of the subcontracting opportunities you listed in Section 2b. The following link will direct you to the HUB Subcontracting Plan form for Construction [http://www.utmb.edu/supplychain/hub/planform.asp](http://www.utmb.edu/supplychain/hub/planform.asp)

Submit **all supporting documentation with your HUB Plan** (i.e., certified letter, fax, e-mail) demonstrating evidence of your good faith effort to notify the Texas certified HUBs and Texas trade organizations or development centers.

Submit **the HUB certification profile showing the HUB firms active status** for all HUBs listed in Section B-3 (b.) of the HUB Plan. *Note: This will assist UTMB with a more rapid evaluation process.*

When searching for Texas certified HUBs, ensure that you use the State of Texas’ Centralized Master Bidders List (CMBL) and Historically Underutilized Business (HUB) Search directory located at the following link: [https://mycpa.cpa.state.tx.us/tpasscmblsearch/index.jsp](https://mycpa.cpa.state.tx.us/tpasscmblsearch/index.jsp). HUB Status code “A” signifies that the company is a Texas certified HUB.
HUB Subcontracting Plan (HSP) Required

• Non-submittal of documents may be grounds for disqualification
• Do not make any assumptions or interpretations of the HUB Plan document; if you need assistance please request assistance.
• Include all required documentation (UTMB reserves the right to seek clarification on all documents submitted. In addition, UTMB may request supplemental documents to clarify the documents submitted)

Allow sufficient time for posting subcontracting opportunities.

• Must allow seven (7) business days for response. Normal business day of a state agency, not including weekends, federal or state holidays, or days the agency is declared closed by its executive officer.
• Initial day the opportunity notice is sent/provided to the Texas HUBS and to Texas trade organization/development centers is considered to be “day zero” and does not count as one of the seven (7) working days.
• Written notification to trade organizations/development centers located in Texas only; The notice provided to the Texas trade organizations or development centers is required so that those organizations can post the prime contractors’ notice of subcontracting opportunities to their members. One is not asking those organizations to bid on the opportunities

There are no UTMB Holidays that take place during the Competitive Sealed Proposal process
HUB SUBCONTRACTING PLANS (HSP)

Selection of Subcontractor

Respondents cannot select a subcontractor unless they correctly complete the State of Texas HUB Subcontracting Plan Method B process for soliciting for HUBs.

As a point of clarification; if the respondent has a formal State of Texas Mentor Protégé Agreement signed with the subcontractor (See Section B-2 HUB Subcontracting Plan) the state signed document constitutes a good faith effort to subcontract with a Texas certified HUB towards that specific portion of work.

Example: If the state mentor-protégé agreement is for the Respondent to mentor the HUB subcontractor on cement services then that is the only scope of work for which that agreement is valid. The respondent would have to have multiple mentor protégé agreements for other scopes of work. (A copy of the State of Texas Mentor-Protégé Agreement signed by the state Comptrollers office and the sponsoring state agency must accompany the HUB Plan submittal.)

HSP Review

HUB Plans may be submitted to Tracy Jackson at trrjacks@utmb.edu to verify the most current HUB Subcontracting Plan form is used. This review will not include content.

Respondent has the option to submit the HSP for a courtesy draft review. The HSP must be filled out in its entirety and sent to Karen Gross at klgross@utmb.edu. Place "Draft HSP" in your subject line of the email and submit no later than 72 hours in advance of the solicitation due date. The courtesy review is contingent upon HUB Program staff availability and is limited to one per vendor per solicitation.

HSP Questions

For assistance with the State of Texas HUB Subcontracting Plan requirements contact Karen Gross, Manager of Supplier Diversity Programs/HUB Coordinator at 409-266-1094 or by e-mail at klgross@utmb.edu.
POINT OF CONTACT

Respondents shall restrict all contact with the Owner and direct all questions regarding this RFP, including questions regarding terms and conditions, to the Point-of-Contact person(s) specified.

• Questions must be submitted in writing via e-mail to:
  ➢ Chuck Anderson, UTMB Program Director
candero@utmb.edu
  ➢ Shanna Watts, UTMB Sr. Acquisition Specialist –Purchasing
shwatts@utmb.edu

Last day for questions: **Wednesday, April 15th, 2020 at 3:00 PM CST**
EVALUATION CRITERIA AND PROPOSAL REQUIREMENTS

• Evaluation based on the requirements described in this RFP
• Portion of the evaluation will be based on Respondent’s Pricing and Delivery Proposal
• After 3PM, CST on May 7th, when all proposals have been received, a bid tab will be available upon request. Please email shwatts@utmb.edu to request a copy of the bid tab to be sent to you or your firm.
• Any Proposal received, in which the HSP was not accepted by UTMB, shall not be considered in the evaluation process for the award of this project.
• Proposals, in which the submitted Self-performing HUB Plan and Letter of HUB Commitment was accepted, shall be evaluated on the criteria as specified below.

✓ Proposed Co-efficient
✓ JOC Key Personnel, Past Experience and References (Company Overview)
✓ Subcontractors Past Experience and References
✓ Project Management
✓ Safety Program
✓ Quality Control and Commissioning Program
RFP SECTION 4
FORMAT OF PROPOSAL

• Technical Proposal – Maximum of Fifteen (15) printed pages
• HUB Commitment Letter – Provided in RFP – Must be signed by individual that signs the offer for the company
• Proposals shall be submitted as Four (4) separate documents:
  1) Completed Pricing and Delivery Proposal Form
  2) Respondent’s Technical Response
  3) Self-performing HUB Plan
  4) HUB Letter of Commitment
• Please ensure appropriate areas have been signed and dated.
Questions?

- Please type in your question on left side panel of this presentation, or

- Please say the name of your company in a clear voice on the call – I will call on you for your question(s).

- **Any** questions must be reiterated in writing, by 3pm, CST on Wednesday, April 15th, 2020 to:

  shwatts@utmb.edu

  canderso@utmb.edu

- Any addendum will be posted with responses to all questions.