



REQUEST FOR PROPOSAL
RFB 2009-015

ADDENDUM NO. 1

To: Prospective Bidders

From: Llew F. Perry 
Cooperative Educational Services

Date: March 20, 2009

Cooperative Educational Services (CES) received questions regarding RFP 2009-015 by email and during its pre-proposal meeting. The following are the responses to the questions asked.

Questions asked during the Pre-Proposal Conference

During the discussion regarding the relationship between Category 1: Consulting Services Relating to the Development, Implementation, Maintenance and Execution of a Job Ordering Contracting Turn-Key System and Category 2: Consulting Services Relating to Soliciting for, Awarding, Implementing and Managing a Job Ordering Contracting Program Based on RS MEANS and Line-Item Pricing and can a vendor respond to both Category 1 and Category 2 with there being a conflict.

Background:

RFP 2009-015 Section II: Scope of Work and Specifications, Item H: Listing of categories, Category I Scope of Work, page 45

CES is seeking proposals from qualified consultant(s) and ASP software provider(s) to develop, implement and assist in executing a Job Order Contracting (JOC) System. The requested system is intended to enhance CES' current construction procurement program. The main objective of the system is to enable CES to rapidly engage contractors to perform construction and construction-related services. The scope of services may include, but is not limited to, the following:

1. Assist CES in developing a full set of customized Job Order Contracting documentation encompassing and adding to existing construction tasks, technical specifications and CES terms and conditions.
 - A. The catalog(s) of construction tasks shall contain no less than the number of individual construction tasks found in the R.S. Means publication, along with an associated unit of measure and price. Each

unit price shall be developed based on the prevailing equipment, material and labor prices within New Mexico's geographical regions.

- B. The technical specifications shall be developed in conjunction with and have a direct relationship with the catalog(s) of construction tasks offered and, where available, CES' and NMPSFA's existing standards and requirements must be incorporated.
 - C. The contractual terms and conditions shall be developed in conjunction with NMPSFA, CES and its Member's staff and shall include all appropriate contract language and forms as may be required by NMPSFA, CES, and its Members.
2. Provide qualified staff with extensive public sector procurement experience to assist CES with technical and marketing support required during the procurement phase in order to provide the service relating to organizing and conducting pre-bid meetings with prospective bidders, as well as make presentations on behalf of CES with various state agencies, businesses and contracting organizations.
 3. Provide CES access to a complete and comprehensive JOC management information and support system. The system must be web-based and Windows compatible. The JOC management information and support system must be capable of providing full project tracking, automated development of cost proposals and independent agency estimates, generation of all project documentation, providing a project scheduling capability, budget and cost control and the generation of customized reports. The system must be capable of incorporating current NMPSFA and CES forms and documentation. With 176 members and 40 Participating Entities located throughout the State, the proposed solution must be Internet/Web-based so that all locations work from the same central data repository capable of allowing multiple users access simultaneously.
 4. Provide the training essential to ensuring that the proposed JOC system functions properly. The training offered must be hands-on and appropriate for all potential users of the systems including, but not limited to, CES and its Members, Participating Entities, NMPSFA, NMBED, CES-awarded contractors and agencies' architects. The staff involved may include: procurement staff, construction managers, field staff, architects, engineers, clerical, administrative and contractor's staff.
 5. Technical support services offered may include, but are not limited to, system development and support, configuration and set-up, and assisting CES in establishing, implementing and executing the necessary procedures and guidelines to operate a successful JOC system. Provide day-to-day technical support system users.

RFP 2009-015 Section II: Scope of Work and Specifications, Item H: Listing of categories, Category 2: Scope of Work, page 54.

CES is seeking proposals from qualified consultant(s) to assist CES, its Members, Participating Entities and vendors in operating and supporting a RS Means and Line-Item Job Order Contracting (JOC) Program. The requested services are intended to enhance CES' current construction procurement program, and the main objective of the proposed program is that, upon the request of the agency, the consultant would provide as little or as much technical assistance and support to the Member or Participating Entity necessary to allow them to rapidly engage and acquire from CES construction contractors construction-related products and/or services in a cost effective and timely manner. The scope of services may include, but is not limited to, the following:

1. Assisting CES in establishing, implementing and executing the necessary procedures and guidelines to operate a successful JOC program based on RS Means/Line-Item pricing.
2. Assist CES in communicating and educating its Members and Participating Entities of the processes and procedures that CES will have in place to assist and support them, if requested, with acquiring and

procuring construction products and services utilizing CES RS Means based construction contracts. The JOC consulting services being requested may include, but is not limited to:

- A. Assisting agencies in engaging one of CES' RS Means/Line-Item construction contractors; jointly conducting a project development meeting to review the project's scope of work, specifications and requirements; perform a site visit to ascertain its current conditions; and discuss, address and resolve any concerns and issues relating to the proposed project prior to the contractor preparing and submitting a cost quote/proposal.
 - B. Once the engaged contractor has prepared and submitted a cost quote/proposal to the Member/Participating Entity, assist in reviewing, evaluating and advising them of any concerns and/or issues that need to be addressed with the contractor prior to accepting or rejecting the contractor's offer.
 - C. Provide technical assistance and support services relating to the products, services and/or construction processes to be utilized in and/or during an individual project's performance and completion.
3. Provide qualified staff with extensive public sector procurement experience to assist CES with technical and support services required during the procurement phase in order to assist perspective bidders in developing a knowledge and understanding of the RS Means pricing methodology, making presentations on behalf of CES with various state agencies, businesses and contracting organizations relating to how the RS Means process works and how an RS Means price quote/proposal is laid-out and presented. .
 4. Upon request, provide hands-on training services for both CES Members', Participating Entities' and vendors' staff on the RS Means pricing method; the components that make up an RS Means quote/cost proposal and essentials for using RS Means and Line-Item costing to price out a specific construction project. Training offered must be appropriate for all potential users of the RS Means systems including, but not limited to, CES and its Members, Participating Entities, NMPSFA, NMPED, CES-awarded contractors and agencies' architects. The staff involved may include: procurement staff, construction managers, field staff, architects, engineers, clerical, administrative and contractor's staff.
 5. Technical support services offered may include, but are not limited to, how to utilize and set the RS Means software and how to configure the RS Means software to meet the individual users' needs.

CES Response:

CES has determined that yes there would be a potential conflict having a single vendor responding to and being awarded contracts under both Category 1 and Category 2 due to the nature of these two categories and the implementation and conduct of these services.

Therefore, please note that prospective vendors shall respond to either Category I or Category 2 and not both.

Question:

As part of Category 2' Scope of Work CES indicated "Upon request, provide hands-on training services for both CES Members', Participating Entities' and vendors' staff on the RS Means pricing method, the components that make up an RS Means quote/cost proposal and essentials for using RS Means and Line-Item costing to price out a specific construction project." The comment was made that RS Means, as the publisher of the RS Mean, is the only organization that is qualified to provide training on the RS Means' software. What is intended by CES' reference statement?

Background:

RFP 2009-015 Section II: Scope of Work and Specifications, Item H: Listing of categories, Category 2: Scope of Work, page 55.

4. Upon request, provide hands-on training services for both CES Members', Participating Entities' and vendors' staff on the RS Means pricing method; the components that make up an RS Means quote/cost proposal and essentials for using RS Means and Line-Item costing to price out a specific construction project. Training offered must be appropriate for all potential users of the RS Means systems including, but not limited to, CES and its Members, Participating Entities, NMPSFA, NMPED, CES-awarded contractors and agencies' architects. The staff involved may include: procurement staff, construction managers, field staff, architects, engineers, clerical, administrative and contractor's staff.
5. Technical support services offered may include, but are not limited to, how to utilize and set the RS Means software and how to configure the RS Means software to meet the individual users' needs.

CES Response:

It is CES' intent, that any respondent to Category 2, possess a well rounded and comprehensive knowledge and background in working with and utilizing the RS Means pricing method to estimate and price a wide range of construction products and services. This is to ensure that the respondent has the capacity and ability to assist CES members in reading, analyzing, interpreting, evaluating, understanding and determining if the cost proposals/price quotes submitted are complete and accurate based on the project's specifications and requirements. The RS Means pricing method is based on project cost generated through the RS Means' software application. Technical support relates to assisting the end user in understanding, navigating and applying the software application. It should be noted that this is only one aspect of the type and level of consulting services relating to acquiring and procuring construction products and services that is being solicited for. Yes, RS Means, as other software publishers do, offer and provide extensive and comprehensive training to the end user. If that is the level desired then the end user needs to take advantage of the RS Means' training program.

Question Submitted by: Hank Rosoff, Planning Director
hankr@thegroup.cc
Received: February 23, 2009

The due date shown on Page 1 and in the RFP Advertisement is March 27, 2009. Throughout the RFP in the footer and on Page 9 (Step 3), the due date is shown as March 20, 2009.

Background:

RFP 2009-015, Section I: Instructions to Offerors, Item 3: Contents of the Proposal, Step Three, Page 9

Go to the last page of this RFP and prepare the Submission Check-off Form. Sign it and place it after Tab 9. Send your proposal to CES so that it arrives on or before Friday, March 20, 2009, at 1:30 p.m. MST.

CES Response:

Yes, the **due date** is Friday, March 27, 2009.

Question Submitted by: Chris McMahan
cmcmahan@geraldmartin.com
Received: March 16, 2009

The following question pertains to RFP 2009-015, Category 3:

On page 72 under Required Categorical Responses, item #2, asks the following: *In support of your response for Form J and J-1 ... demonstrating you firm's leadership, management team and the quality and level of expertise ..., please provide the information requested on Exhibit 2 Staff Resumes for each of these individuals (Place completed form(s) behind Tab 5)*

I am unable to find an "Exhibit 2 Staff Resumes" in the RFP, and the Check List "Form K" at the end of the RFP calls for copies of resumes and other support documentation to demonstrate and justify responses provided on Forms J and J-1 to be placed behind Tab 4. – Please clarify.

Question Submitted by: Kimberly R. Altmire
KRAltmire@bpce.com
Received: March 17, 2009

Required Categorical Responses (**Category 3**) Page 72 of the RFP requests:

"In support of your response to Form J and J-1 dealing with staffing and demonstrating your firm's leadership, management team and the quality and level of expertise, as well as the number of available consultants to respond to and meet Members'/Participating Entities' needs within a CES region or throughout the State, please provide the information requested on Exhibit 2 Staff Resumes for each of these individuals (Place completed form(s) behind Tab 5).

Exhibit 2 is not a Staff Resumes form. On the website Exhibit 2 is the Vendor Agreement. We cannot find a form on the CES website that pertains to resume information. Is there an additional form that we need to use to for our staff resumes? If not, what type of information do you want provided for the staff resumes?

Background:

RFP 2009-015 Section II: Scope of Work and Specifications, Item H: Listing of categories, Category 3: Required Categorical Responses page 72.

The Offeror must respond to each of the items listed below by providing written narratives, documentation and other information necessary to answer the questions, and demonstrate its ability and capacity to provide/perform the quality and level of consulting and support services solicited for herein. Failure to respond and comply with the items below may result in the Offeror's response being considered non-responsive.

Note: Some of the documentation and information requested may be requested to be placed behind Tab 4 Offeror's Qualifications, and Tab 5 Categorical Information. If you have placed the documentation/information behind Tab 4, in the response to the request for Tab 5, just reference where it can be found behind Tab 4. It does not need to be duplicated in both places.

2. In support of your response to Form J and J-1 dealing with staffing and demonstrating your firm's leadership, management team and the quality and level of expertise, as well as the number of available consultants to respond to and meet Members'/Participating Entities' needs within a CES region or throughout the State, please provide the information requested on Exhibit 2 Staff Resumes for each of these individuals (Place completed form(s) behind Tab 5).

CES Response:

Exhibit 2 is incorrect and staff resumes should be provided in support of Form J and J1 if applicable and the resumes should be placed behind Tab 4.

Question Submitted by: Barbara Panozzo
barb@harrisnm.com
Received: March 16, 2009

At the pre-proposal conference it was mentioned that we should insert our responses to questions directly into the RFP document not separately on our letterhead. Example: 4. Offeror Qualifications a. Write a brief history of your company.... Is this correct?

Background:

RFP 2009-015, Section I: Instructions to Offerors, Item E: Proposal Submission, 1: Preparation of Proposal. Page 7.

b. Proposals will be submitted on either unaltered proposal forms furnished by CES or a reasonable facsimile thereof. Telegraphic offers, electronic mailgrams or facsimile machine offers will not be considered.

RFP 2009-015 Section IV: Proposal Forms, Form J: Offerors Qualifications (Tab 4), Page 93.

This is reprinted from Section 1, No. 4 – Offer Qualifications – Please provide your responses on this form and submit with your Proposal

CES Response:

As indicated by the above background information respondents may reproduce or put Form J on company letterhead or add a header with the company's name. CES has provided Form J in a work format so that the respondent may insert their answers in to the document. As noted this is done to standardize the response so that both the evaluators and its members can find all of the respondents' information laid out the same way. It is also understood that additional information and support documents will be attached as exhibits or at the end of Form J.

Question Submitted by: Jeff Holmes
jholmes@arcadis-us.com
Received: March 18, 2009

Is it possible to get a clarification for RFP 2009-015? On page 71 (Category 3 – Required Response #1), the question references **Exhibit 1: Declaration of service offered**. This form does not appear to be part of the packet nor is it on the website. Is this an additional form? If so, where can we obtain it?

Background:

RFP 2009-015, Section II: Scope of Work, Category 3, Required Categorical Responses, Item 1, and Page 71.

Due to the breadth and scope of this category, and the varied and different needs of CES Members and Participating Entities throughout the State of New Mexico, and the areas of specializations and disciplines required to meet these needs, CES is asking the Offeror to clearly identify and indicate those areas of consulting and support services that they are proposing to offer in response to this category by completing Exhibit 1: Declaration of services offered (Place completed form(s) behind Tab 5).

CES Response:

The wrong form is referenced please note the following changes:

RFP 2009-015, Section II: Scope of Work, Category 3, Required Categorical Responses, Item 1, Page 71.

Change From:

Due to the breadth and scope of this category, and the varied and different needs of CES Members and Participating Entities throughout the State of New Mexico, and the areas of specializations and disciplines required to meet these needs, CES is asking the Offeror to clearly identify and indicate those areas of consulting and support services that they are proposing to offer in response to this category by completing Exhibit 1: Declaration of services offered (Place completed form(s) behind Tab 5).

Change To:

Due to the breadth and scope of this category, and the varied and different needs of CES Members and Participating Entities throughout the State of New Mexico, and the areas of specializations and disciplines required to meet these needs, CES is asking the Offeror to clearly identify and indicate those areas of consulting and support services that they are proposing to offer in response to this category by providing a written narrative identifying and describing the type, levels and kinds of services offered. Consulting services listed in response to this item, associated costs must be enumerated in Exhibit 3: Excel Price Book. (Place written narrative behind Tab 5)

Question Submitted by: Brett Harris
brett@harrisnm.com
Received: March 20, 2009

Question:

On page 55 of the above referenced RFP, Categorical Terms and Conditions item 2A states that “The Offeror’s staff must be: trained and qualified in the setup, configuration and operation of the RS Means system”. Will CES require that all training segments on application of RS Mean’s data be RS Means Company sanctioned? RS Means offers regular training courses throughout the US; would CES require the official RS Means Company courses to be offered under this contract?

Background:

RFP 2009-015, Section II: Scope of Work, Category 2, Categorical Terms and Conditions, Pages 55-56.

1. The Offeror through its response must demonstrate its staff’s knowledge, background and experience with working with and estimating project costs for a variety of construction products and services relating to the various trades and specialized disciplines for which CES utilizes RS Means costing and/or line-item pricing. CES utilizes the most current year’s edition of RS Means and, depending upon the type of project and its requirements, one of the following RS Mean’s costing modules is utilized.
 - A. Repair and Remodeling Cost Data
 - B. Building Construction Cost Data
 - C. Facility Construction Cost Data

2. The Offeror’s staff must be:
 - A. Trained and qualified in the setup, configuration and operation of the RS Means system;
 - B. Familiar with and experienced in selecting the appropriate line-items and indicating the quantities required based on the project’s scope of work and/or drawings;
 - C. Able to review a submitted RS Means price quote/proposal and, based on the project’s scope of work and/or drawings, evaluate and determine if the appropriate factors are being utilized and that the quote/cost proposal contains the proper line-items and quantities required for the project.
 - D. Able to, based on their review/evaluation, discuss, make comments, suggestions and/or recommendations to the Member or Participating Entity regarding accepting, modifying or rejecting the contractor’s proposal.
 - E. Able to advise and justify to the contractor and the Member/Participating Entity why the comments, suggestions and/or recommendations were made and based on what criteria.
 - F. Able to make reports and presentations to the agencies’ administrative team, committees and governing boards who may be considering the procurement and who may have questions regarding the cost quote/proposal submitted.

CES Response:

CES is aware that RS Means does have a training and certification program and a division that offers these types of services, as other software and database providers do. CES is aware that there are other consultants and/or firms that may have taken some training but are not RS Means certified. The non-certification training,

utilization and application of the software, along with comprehensive and in depth experience in estimating and quoting the various types of construction tasks and products found within the RS Means application, these consultants and/or firms have developed the necessary skills, ability and capacity to advise and consult with CES members and participating entities as it relates to the procurement process. It should also be noted that that the consulting services being solicited for by CES involves the consultant and/or firm to demonstrate that they possess the knowledge, background, experience and understand the various aspects and components of construction and procuring construction products and services as they relate to the K-12 educational and public sectors.

The final determination if a consultants and/or firm meets the individual CES member's/participating entities needs and requirements fall with the entity utilizing the contract as with all of CES' contracted vendors.

If you have any questions regarding this Addendum, please contact my office.

By dating, signing and returning this page, the offeror acknowledges receipt of Addendum No. 1 (Please place behind Tab 1 of your response).

Date: _____

Company Name (Print): _____

Printed Name: _____

Signature: _____