

TO: All Prospective Proposers

FROM: Ronnie R. Rafferty, Acting Contracts and Procurement Manager

DATE: May 26, 2023

Subject: Addendum 2 – RFP #23-06 – Program Management Consulting

The following change(s) have been made to the above-mentioned RFP. This document (hereinafter referred to as **Addendum 2**) becomes a binding component of the RFP and the resulting contract award. All proposers must include acknowledgment of this Addendum with submission.

Changes/Revisions/Clarifications made throughout the Request for Proposal (RFP)

1. **Revised Page 3 of the RFP Form**
 - **Proposers Information**
2. **Revised Page 5 of the RFP Form**
 - **Scope of Services**
3. **Revised Page 7 of the RFP Form**
 - **Scope of Services**
4. **Revised Page 13 of the RFP Form**
 - **Scope of Services – Evaluation Criteria**
5. **Revised Page 14 of the RFP Form**
 - **Scope of Services – Evaluation Criteria**
6. **Revised Page 18 of the RFP Form**
 - **Article 11 – Proposal Evaluation Criteria**
7. **Revised Page 19 of the RFP Form**
 - **Article 11 – Proposal Evaluation Criteria**
8. **Revised Page 20 of the RFP Form**
 - **Article 11 – Proposal Evaluation Criteria**

Please make a note of these changes and ensure that any relevant parties are informed accordingly.



Please amend your proposal package to reflect the referenced changes, revisions, and/or clarifications. Be sure to acknowledge the inclusion of all addenda issued prior to the proposal deadline in your proposal. Your failure to do so may render your proposal non-responsive.

Acknowledgment of Addendum 2

Signature

Date

Print

Title

Proposers Information

Questions or requests for clarifications and all communications with BJCTA personnel concerning this RFP must be received by BJCTA, by the **"Deadline for Questions"** specified on the cover page of this document. Responses and any addendum(s) will be posted at – BJCTA's Vendor Portal, no later than the "Response to Questions" date on the cover page. Any changes will be valid only if included in an addendum, posted in the same manner as the RFP. Proposers shall acknowledge receipt of all addenda in writing by completing and returning **Attachment B, "Acknowledgement of Addenda."** Failure to acknowledge receipt of an addenda(s) and to complete all requirements below shall be considered non-responsive and rejected by BJCTA. Please use the following email address to submit your response: procurebids@bjcta.org

In the "Subject" area of the email, please state:
PROGRAM MANAGEMENT CONSULTANT
RFP NO. 23-06

Only one proposal per firm is allowed. Proposals must be submitted through the Vendor Portal on the PlanetBid website, <https://pbsystem.planetbids.com/portal/55902/portal-home>, no later than the **"Proposal Due Date"** stated on the cover page. The receipt time on Planet Bid's Portal will be recorded as the official receipt time. Any Proposal received after the deadline will be considered non-responsive and will be rejected. BJCTA reserves the right to reject any or all Proposals and to waive any irregularities or informalities in any Proposal or in the Proposal procedure. Proposals may be withdrawn by written request to BJCTA prior to the Proposal opening due date. No Proposer may withdraw a proposal for a period of 120 days after the scheduled time due date.

If awarded, this RFP may also serve as the contractual agreement between the successful Proposer and BJCTA and does not commit BJCTA to award a Contract or to pay any cost incurred in the preparation of a Proposal. BJCTA reserves the right to cancel the RFP or issue a subsequent RFP at any time during the solicitation process.

BJCTA will initially review the proposals for responsiveness and responsibility-related criteria as set forth in the RFP. Those proposals that meet the responsiveness and technical experience requirements will then be scored according to the following criteria:

- **Introduction of the Prime Consultant & Contractor, Qualifications, Background, and Experience of the Proposer Team**
- **Methodology**
- **Performance Metrics and References from Similar Projects**
- ~~**Disadvantaged Business Enterprise (DBE) Participation (Non-Mandatory) Price Proposal (Separate)**~~

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- ~~**A Separate Price Proposal will be based on a Pass or Fail standard. Disadvantaged Business Enterprise (DBE) Participation (Non-Mandatory) based on a Pass or Fail standard.**~~

In the event a Proposer is seeking to protest, please refer to the complete protest procedures at the following website: <https://maxtransit.org/protest-of-procurement/>

FULL PROPOSAL PACKAGES SHALL NOT BE MORE THAN THIRTY (30) PAGES.

RFP #23-06 – Program Management Consultant

Federal Transit Administration (FTA) published a Construction Project Management Handbook detailing how a Project Manager should work on FTA-funded projects. FTA also publishes comprehensive Project and Construction Management Guidelines. It is recommended that interested firms review both handbooks for a further explanation of the types of tasks that may be associated with the BJCTA Bus Maintenance Facility project.

The Project and Construction Management Guidelines are available here

[FTA Project and Construction Management Guidelines 2016 | FTA\(dot.gov\)](#)

PROJECT MANAGEMENT (DESIGN PHASE)

The Construction Project Management Handbook is available here

[FTA Construction Management Handbook 2016 | FTA \(dot.gov\)](#)

The PMC will be responsible for project coordination and collaboration with the BJCTA Bus Maintenance Facility design team including client communications, agency coordination, and other activities necessary for the successful completion of the design plans and construction documents required to solicit bids for the construction of the facility.

- A. The PMC firm is required to evaluate the schedule in Primavera P6 from both the Contractor and the design team to ensure that the project remains on schedule. The schedule will be reviewed monthly. If it is determined to be behind schedule, the PMC firm will notify BJCTA's representative and work with relevant parties to develop and implement a recovery schedule.
- B. Draft and update the FTA-required Project Management Plan (PMP) as well as all the PMP components and required sub-plans which include the Safety & Security Management Plan (SSMP), Quality Management Plan (QMP), and the Facilities Maintenance Plan (FMP).
- C. The PMC firm will work with the BJCTA staff to finalize the Public Outreach Plan.
- D. The PMC firm will ensure that the design team is accountable to the schedule. The PMC firm will track the design team process and the construction correspondence (ex. Requests for Information (RFIs), Proposal Requests, Submittals, Change Orders, etc.) within the agreed-upon response timeframe. This process will be tracked and discussed at project meetings.
- E. Regular site visits are necessary to ensure existing conditions are known and reflected accurately on the new design plans.
- F. Review and approve design and construction estimates provided by the design team to ensure they are fair, reasonable, and can be constructed within the budget assigned to the project. Any estimates over \$2,500 need to be approved by a BJCTA representative.
- G. Comprehensive constructability, maintainability reviews, and feedback to the design team that suggest alternatives that meet BJCTA standards and have the potential to minimize risk, project costs, improve quality or sustainability, or have a positive impact

7. Monthly Report on Project Status, Activities, Challenges, Change Orders, Quality Assurance/Quality Control (QA/QC) report, etc.
8. Monthly Updates to all project plans including the PMCP, SSMP, QMP, FMP and Public Outreach Plan
9. Monthly Application for Payment (AIA forms) Value Engineering Report

PROGRAMMING

The PMC firm coordinates with the design team and works with BJCTA staff and external entities to update the programming document that leads into schematic design products. The PMC firm will be BJCTA's lead representative to ensure that BJCTA receives design documents that meet the objectives of the organization. The PMC firm will be responsible, at a minimum, for:

- A. Assisting BJCTA staff in developing and accurately defining the scope of the design criteria.
- B. Reviewing and approving of the design team consultant's programming documents to ensure that the facility meets BJCTA's criteria and requirements, before moving on to the next phase.
- C. Receiving BJCTA internal staff sign-off on the completed document.

Deliverables:

1. Approving the Design team's programming documents, schedule, and cost estimate.

CONCEPT DESIGN

The PMC firm will coordinate with the design team to develop concept designs in the format of a simple diagrammatic document delineating room sizes and relationships based on the programming documents. The design team shall provide single line diagrams of all systems (i.e., water mains, electrical lines, shop equipment, etc.), preliminary elevation studies for the building exterior, and any drawings of special interior spaces. The PMC will, at a minimum:

- A. Facilitate BJCTA staff meetings with the design team and document progress.
- B. Primavera P6 Schedule with Schedule Notes
- C. Safety & Security Management Plan (SSMP)
- D. Quality Management Plan (QMP)
- E. Facility Maintenance Plan (FMP)
- F. Project Team Sign-off Meeting Minutes
- G. Monthly Report on Project Status, Activities, Challenges, Change Orders, QA/QC report, etc.
- H. Monthly Updates to all project plans including the Product Management Professional Certification (PMCP), SSMP, QMP, FMP and Public Outreach Plan
- I. Monthly Application for Payment (American Institute of Architects (AIA) forms) Value Engineering Report

The senior-level manager shall have 10 or more years of experience in management. Experience related to FTA-funded projects is considered a plus.

The PMC is required to be present and run the project meetings and will be responsible for the overall completion and coordination of the work and processes in order to complete the project.

TECHNOLOGY STANDARDS

The PMC firm shall use Microsoft Office software that is compatible with existing BJCTA programs and approved by BJCTA. Prior to starting work, BJCTA Executive Director and the PMC will agree on software programs to be used for documentation and analysis.

All work developed by the PMC for this project will be the property of the BJCTA. The PMC shall provide all electronic files to BJCTA in the original format. BJCTA may require, for ease of use, that some documents be presented in PDF format.

Document Control: All documents shall be uploaded, logged, and tracked BJCTA's web-based document control system to be selected in by BJCTA. BJCTA shall provide web login access to the PMC. Original copies shall be housed at the field office and later transferred to the BJCTA.

BJCTA's authorized scheduling software is Primavera P6.

All drawings and work products shall conform to industry standards.

QualificationsProposals Submittal Evaluation Criteria

Please note that a forthcoming article, number 11, titled "Proposal Evaluation Criteria" will be included in the solicitation to provide additional insight into the evaluation criteria.

The following are the criteria (not in any order) by which the QualificationsProposals Submittals from responsible interested firms will be evaluated and ranked for the purposes of determining any.

Competitive Range and to make any selection of a QualificationsProposals Submittal for a potential award. If applicable, any exceptions, conditions, reservations, or understandings explicitly, fully, and separately stated, which do not cause the BJCTA to consider a QualificationsProposals Submittal to be outside the Competitive Range, will be evaluated according to the respective evaluation criteria and sub-criteria that they affect.

BJCTA will initially review the QualificationsProposals Submittals for responsiveness. Those Proposals that fulfill the responsiveness requirement will be assessed based on the criteria outlined in Article 11 of this RFP (#23-06), while adhering to these specified details. Qualifications Submittals that meet the responsiveness requirement will then be scored according to the following criteria.

- a) Document Quality
 - Completeness
 - Presentation
- b) Project Team QualificationsProposals – Interested Firms are encouraged to pay particular attention to the following characteristics:

- FTA Experience – Experience working on FTA-funded projects. Experience assisting with FTA ~~re-porting~~reporting, management, testing, start-up, closeout, and other processes.
 - Construction Management Experience – Experience with construction scheduling, estimating, QA/QC, technical coordination, and management of contractors and vendors.
 - Bus Rapid Transit – Experience with bus rapid transit projects.
 - Bus Operations and Maintenance Facility – Experience with managing the program, design, construction contractors, closeout, commissioning, operational readiness and move management.
- c) Project teams can be made up of multiple entities to best provide a strong combination of experience and services.
- d) Project Experience/History – Interested Firms are encouraged to highlight FTA-funded projects and projects where program management services were provided for Bus Rapid Transit and Bus Operations and Maintenance facilities.
- e) References – Provide three references that can attest to the quality of the services provided on previous or similar projects. Projects which involved FTA funding and processes are preferred.

General Guidance

BJCTA reserves the right to accept or reject any or all proposals and may select and negotiate with one or more Proposers concurrently should they both be deemed equal. BJCTA's intention is to enter into a Contract with the Proposer who is determined, by BJCTA, to provide the services which are in the best interest of BJCTA. BJCTA may agree to such terms and conditions as it may determine to be in its interest. BJCTA's evaluation committee reserves the right to request additional information from Proposers, to negotiate terms and conditions of the Contract, request oral presentations, inspect Proposer's facilities (if necessary), and/or ask Proposers to appear before the evaluation committee to answer questions or clarify points of their proposal.

All Proposers will be notified after the evaluation committee has selected the most qualified Proposer. Award of this contract shall be on the basis of the above-outlined evaluation criteria and awarded to the Proposer whose proposal is judged as providing the best value in meeting the interest of BJCTA and the objectives of the project, in BJCTA's sole determination.

Instructions for Proposals

The Proposer shall submit the completed Request for Proposal (RFP) with appropriate attachments/exhibits on BJCTA's PlanetBid Vendor Portal. All attachments/exhibits shall be identified with the Proposer's name and RFP number. No oral, telegraph, telephone, or facsimile proposals will be accepted. RFPs must be in typewritten or word-processed format.

FULL PROPOSAL PACKAGES SHALL NOT BE MORE THAN THIRTY (30) PAGES.

This includes Cover Page, Table of Contents, and Attachments. Each side is considered 1 page.

to this solicitation."

10. Employment Restriction Warranty

a) The Proposer warrants that it will not offer employment to any officer or employee of the Birmingham-Jefferson County Transit Authority (Authority) who has been involved, directly or indirectly, in any matter of financial interest to the Proposer until at least one (1) year after the officer or employee has ceased involvement in or responsibility for the matter.

b) The Proposer further warrants that it will not employ any Authority officer or employee who has had direct responsibility for any matter of financial interest to the Proposer within the year prior to the retirement or termination of the officer or employee until at least one (1) full year after such officer or employee has left the employment of the Authority.

c) The one (1) year requirement described in this provision may be waived at the discretion of the Authority if the employee or former employee has been subject to a Reduction in Force; in such case, BJCTA will provide the Proposer with a letter to that effect.

d) If a waiver is granted, or if a former employee of the Authority is eventually hired, the Proposer shall be responsible for ensuring that the former employee is not directly involved in negotiating or otherwise dealing with Authority on any matter over which such employee had responsibility during his or her period of employment at Authority.

e) Should the Proposer fail to comply with paragraphs (a), (b), or (d) above, BJCTA shall have the right to terminate the contract and/or mark the Proposer non-responsive with a written notice.

11. Proposal Evaluation Criteria

(100 Maximum Points)

Technical and cost proposals will be evaluated based on the following criteria:

Section I

Introduction of the Prime Consultant & Contractor, Qualifications, Background and Experience of the Proposer Team (405 Maximum Points)

An introduction of the prime Consultant/Contractor, members of a partnership, joint venture, or other teaming arrangements, whichever is applicable, and an introduction of all major subcontractors/subconsultants who may be involved in the performance of the work; and discussion of the primary business experience, length of time in business, ownership, office locations, specific location of the principal office from where the main work will be performed, contact information (i.e., contact names, telephone and facsimile numbers, and email addresses), and other information introductory in nature for each firm involved in making the proposal.

- Provide a credible plan to assemble and engage all necessary Program Management Consultant to BJCTA.
- Provide key information and commitments to fulfill this scope of services.

Section II

Methodology

(2530 Maximum Points)

- Provide a concise and clear understanding of the statement of work that showcases an ability to meet the desired timeline, achieve project outcomes, and implementation.
- Please communicate your firm's unique methodology and product differentiators that best fit the Authority's needs.
- Please articulated the technology and user experience as they relate to the requirements of this project.

Section III

Performance Metrics and References from Similar Projects

(20 Maximum Points)

- Provide at least three like or kind services in the past five years and has experience with Program Management Consultant.
- Provide core metrics and outcomes with similar projects that are leading in the field of Program Management Consultant.

Section IV

Price Proposal

(15 Maximum Points)

○ The Proposer has provided a comprehensive menu of costs that showcase the breadth and depth of the services being required.

~~Disadvantaged Business Enterprise (DBE) Participation (Non-Mandatory) (5 Maximum Points)~~

- ~~○ Non-Mandatory, but Proposers can be awarded up to 5 points for DBE Participation based on the 10% participation goal.~~
- ~~○ Provide credible documents explaining DBE Participation throughout the Contract.~~

Price Proposal

(Pass or Fail)

- ~~○ The Proposer has provided a comprehensive menu of costs that showcase the breadth and depth of the services being required.~~

Price Proposal Evaluation

The Authority will evaluate price proposals for reasonableness, completeness, and realism as

appropriate. Each Proposer's cost will be evaluated in terms of the following which are equal in importance:

- (1) Any offer which is materially unbalanced may be rejected. An unbalanced offer is one which is based on prices that are significantly overstated for some items and understated for other items.
- (2) The Authority will compare the price proposals to the Authority's independent cost estimate (ICE) and otherwise determine reasonableness by performing a price analysis if adequate competition exists. A cost analysis will be performed if adequate price competition does not exist, to ascertain whether the proposed price is fair and reasonable; and
- (3) The Proposer shall provide certified cost or pricing data as requested by the BJCTA Procurement Manager.

Disadvantaged Business Enterprise (DBE) Participation (Non-Mandatory) (Pass or Fail)

- o Non-Mandatory- This project has a 10% DBE participation goal.
- o Provide credible documents explaining DBE Participation throughout the Contract.

(3)

12. Definitions for Technical Evaluation

Clarifications: Communications with a Proposer for the sole purpose of eliminating minor irregularities, informalities, or apparent clerical mistakes in the proposal. Unlike discussions, clarifications do not give the Proposer an opportunity to revise or modify its proposal, except to the extent that correction of apparent clerical mistakes results in revisions.

Discussions: Oral or written communications including negotiations between the Authority and a Proposer (other than clarifications) that; involves information essential for determining the acceptability of the proposal or to cure identified defects in the proposal.

Deficiencies: Defects in the proposal which preclude acceptance. Involves any part of the Proposer's proposal which would not satisfy the Authority's minimum requirements established in the solicitation. Including failures to meet specifications, submit information, or questionable technical or management approaches. Items disclosed during discussions, evaluated in two categories: material-basis for rejection because further discussions would be meaningless; curable –may be corrected by clarifications or discussions and brought into the competitive range.

Weakness: Includes ambiguities, lack of complete descriptions, errors in interpretation, inadequate information, all of which are considered curable in discussions. An excessive number of clarifications may constitute a weakness.

Strengths: Elements of the proposal that exceed the minimum requirements of the solicitation and provide an identified benefit to the Authority.

13. Language and Currency

As regards this solicitation and the resultant contract: