

**University of Maine System  
Request for Proposal Addendum**

**University of Southern Maine  
Consulting for P3 or Alternative Approach for Constructing Residential Housing  
RFP# 2019-021  
ADDENDUM #1**

**CLARIFICATION**

**Deadline for Proposal Submission:** November 1<sup>st</sup>, 2018 at 5:00 p.m. EST.

RFP Timeline of Key Events 1.3.1 is replaced with the following (Changes in ***Bold/Italics***):

**1.3 General Submission Provisions**

**1.3.1 Timeline of Key Events**

Reference Section	Event Name	Event Due Date
Section 1.2.2	Deadline for Written Inquiries/Questions	October 5, 2018
Section 1.2.2	Response to Written Inquiries/Questions	October 11, 2018
Section 1.2.2	Deadline for Proposal Submission	<b><i>November 1, 2018</i></b>
Section 1.3.8	Estimated Respondent Presentation Date (subject to change)	<b><i>Week of November 8-16, 2018</i></b>
Section 2.2	Award Announcement (subject to change)	<b><i>November 27, 2018</i></b>
	Estimated Agreement Start Date (subject to change)	<b><i>December 18, 2018</i></b>

**QUESTIONS**

#	Question	Answer
1	In our experience, 12 business days (including a holiday) is not a sufficient enough amount of time to allow for industry to provide the University with enough highly qualified responses. In addition, allowing only 3 business days for industry to incorporate changes from the Q&A isn't not sufficient and will likely reduce competition and quality as well. Therefore, will the University consider extending the deadline for responses to November 1st?	UMS agrees to the requested deadline change.
2	Does the University expect the contractor to provide legal or technical consulting in addition to the financial consulting requirements listed in Phases 1-3?	UMS has internal counsel and Capital Project Managers but may require additional resources depending on the project approach. In addition, when issuing Revenue Bonds, UMS works closely with its financial advisor and outside bond counsel to conduct all aspects of the bond deal. Beyond that, if the bidder is aware of

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		specific skillsets/expertise that are required for the project, the bidder should identify those, what the bidder is proposing to provide (including capital project management and technical consulting), and define where UMS will need to provide the service or engage another party.
3	Does the University anticipate the need for any specialty services like environmental consulting?	No, not as part of this requested scope.
4	How does the University plan to handle negotiations once the apparent awardee developer is identified after the evaluation process?	Contract will be executed based primarily on RFP response with discussions as needed with UMS Sourcing and General Counsel.
5	Does the University plan to include negotiation services with the potential developer as part of Phase 3 or will this be part of the "Additional Scope" clause?	Phase 3 includes contract execution which may involve negotiations.
6	In RFP Section 1.1.4, Phase 3 tasks include: "Drafting RFP documents." Does the University have contract templates?	Yes, UMS has basic Terms and Conditions such as those included in the RFP.
7	Regarding RFP Section 1.2.10 Environmental Compliance: Does the University anticipate this provision will be applicable?	Section 1.2.10 Environmental Compliance is not applicable to this engagement.
8	Section 1.1.4 refers to a Phase 1 validation of housing strategy. Has a survey of the various targeted student populations been conducted already?	No formal survey has been conducted to date. USM opened the fall 2018 semester at 129% occupancy. A Student Government Association survey was conducted in 2016 that showed a strong interest in housing on the Portland campus. The Law School has examples of students who selected to attend another institution due to lack of affordable housing options in the Greater Portland area.
9	Is a pre-marketing/market sounding effort with developers contemplated as part of the scope in Phase 1 or 2, or should this be considered an "additional/optional service"?	The Phase 1 market analysis should include all components required to validate moving forward with the project.
10	Regarding Phase 2, is a quantitative financial modeling analysis of various options required or rather a qualitative assessment? If quantitative analysis is required, is the Respondent responsible for developing the construction and O&M cost inputs for the financial models?	Depending on the approach, the selected firm may be required to conduct a quantitative analysis of RFP responses including construction and O&M cost inputs. In order to evaluate your firms' capabilities, please follow

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		<p>the instructions in the RFP below. Additional clarification has been added in bold.</p> <ul style="list-style-type: none"> <li>a. Please describe your expertise with <b>developing financial models and/or assessing financial models</b> developed by others for higher education residential housing (Phase 2)</li> <li>b. Please provide examples of different financial / ownership models where your firm has assisted including P3 and 501(c)3 approaches</li> <li>c. Please provide a sample of a financial recommendation you have done for similar projects</li> </ul>
11	<p>In Appendix F, Evaluation Question 6, does “examples of resulting agreements” mean a list of projects where P3 agreements have resulted from the work, or are you looking for actual example contract documents?</p>	<p>Please provide list of projects which resulted in P3 and/or 501(c)3 agreements for higher education residential housing solutions including a description of the various solutions that were adopted. As part of our evaluation, UMS may request copies of the associated resulting agreements.</p>
12	<p>In Rider A to Appendix D, there are three phases— validation of housing strategy, financing/ownership options, RFP process—listed under the specifications of work. However, in Appendix G, Question 4 Owners Representative, we are asked to describe our firm's experience in acting as an owner’s representative for P3 construction projects. Should Respondents include Owners Representative services as a separate component of our pricing proposal or as an additional/optional service that can be utilized by the University?</p>	<p>Additional services such as “Owners Representative for Construction Projects” should be included in the additional/optional services sections of the response.</p>
13	<p>In RFP Section 3.2 Response Format Instructions, sub-section 3.2.4: There are minor discrepancies between Appendix titles listed on page 17 compared with the Appendix titles as they appear on pages 35–38; please clarify the desired Appendix names/titles and desired order of appearance of these items in Respondents’ proposals</p>	<p>RFP 3.2.4 Section 4. Is replaced with the following:</p> <p><b>3.2.4 Section 4 - Response to Questions</b></p> <ul style="list-style-type: none"> <li>3.2.4.1 Label this response - <u>Section 4</u> – Response to Evaluation Questions &amp; Related Information</li> <li>3.2.4.2 Insert Appendix E – Organization Reference Form</li> </ul>



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#	Question	Answer
		3.2.4.3 Insert Appendix F - Evaluation Question(s) – General Organization, Qualifications and Experience 3.2.4.4 Insert Appendix G – Evaluation Question(s) – Specific Project Experience, Implementation and Reporting 3.2.4.5 Insert Appendix H – Proposed Project Plan and Time Line by Phase