



REQUEST FOR QUALIFICATIONS #2021-009
University of Maine Public Private Partnership (P3) for Historical Buildings
Redevelopment
ADDENDUM #4
October 20, 2020

CLARIFICATION

This clarification is related to sections 1.1.3.3 (Partner Solicitation and Selection Process) and 2.2.2.3 (Team Comprehensiveness and Quality), which have been removed from the RFQ and replaced with the following language regarding the requirements for a Respondent to be considered qualified during this RFQ process and to be invited to participate in the future RFP Process:

1.1.3.3 Partner Solicitation and Selection Process

The University is seeking to identify Respondents with qualifications and experience in delivering, renovating, financing, operating, and maintaining historic buildings. A two-part solicitation process, detailed below, will be used to select the awarded Respondent(s).

1. Request for Qualifications (“RFQ”). The University will begin the solicitation process with an RFQ to solicit interest in the Project from developers and other entities with relevant project expertise in delivering, renovating, financing, operating, and maintaining historic buildings. During this part, the University seeks to identify Respondents with interest in participating in this Project as an end-user or tenant that would significantly impact the redevelopment concept. The RFQ process will include a Pre-Bid Event for interested parties to hear more about the Project from the University. Following the Pre-Bid Event, a list of attendees will be made available to interested parties.

This RFQ provides Respondents with additional background information on the Project, instructions for submitting responses, and the Institution’s criteria to identify qualified Respondents. Two (2) or more entities may collaborate in submitting a response to this RFQ; however, a primary Respondent that signs Appendix A must be identified.

2. Request for Proposals (“RFP”). The RFP will be made available only to Respondents identified as qualified for the Project as a result of the RFQ process. The qualification of Respondent teams only guarantees participation in the RFP process for the primary Respondent. Primary Respondents identified as qualified and invited to participate in the RFP process, may make changes to the team members at that time.



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All questions related to this RFQ or the selection process must be directed to UMSresponses@maine.edu.

2.2.2.3 Team Comprehensiveness and Quality

a. Description of Project Team: Respondents must demonstrate the capability of their team to design, renovate, finance, operate, and maintain the Project. The description should include an explanation of the proposed team, a brief overview of each team member, the relevant experience, and the roles of each of the team's key personnel and their resumes. Respondent teams must indicate the firm designated as the primary Respondent. Primary Respondents identified as qualified and invited to participate in the RFP process, may make changes to the team members at that time.

b. Contact Person: Provide a single contact person for all future communication with the University. Disclose the contact person's name, title, organization, address, telephone number, and e-mail address as indicated in Appendix A.

c. Controlling Interest: Identify the individuals or companies who hold a major or controlling interest in the Project.

QUESTIONS

Q1: Has a construction budget been established for the project?

A1: No, a construction budget has not been established for the project. Preliminary construction budgets based on recent feasibility studies were used to confirm project feasibility.

Q2: Can tours of the buildings be arranged?



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A2: Yes, the University will arrange virtual and/or in-person tours of the buildings for RFP participants. Tours will be coordinated after the conclusion of the RFQ process and selection of qualified Respondents to participate in the RFP.

Q3: What is the University's idea of a long term lease?

A3: The University does not have an established minimum or maximum for the length of the lease. Respondents will be expected to propose the most appropriate lease length as required for financing based upon their proposed asset type as part of their RFP response.

Q4: You'd mentioned a long term lease. What timeframe would you anticipate? 10 years, 30 years, or longer?

A4: Please see response to Q3 above.

Q5: Do you prefer to receive submissions from assembled teams? Will individual entities (eg. historic building renovation architects) be considered at a disadvantage if not members of a team?

A5: Respondents to the RFQ must demonstrate that they or members of their team have, at a minimum, the capacity to design, renovate, finance, operate, and maintain the project for the RFP process.

Q6: Are there any MBE/WBE requirements of the development team?

A6: No, there are no MBE/WBE requirements of the development team.

Q7: Has the UMaine System determined a preferred structure for the developer contract? eg. a 501c3, equity, etc.



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A7: No, the University does not have a preferred structure. However, it is the University's goal to transfer risks related to the design, renovate, financing, operation, and maintenance of the buildings through a ground lease with the selected Respondent.

Q8: Section 1.1.3.1.: What lease term is preferred by UMaine / UMS? Is there a statutory maximum lease term that UMaine / UMS can execute with a private sector? If so, what is this maximum lease term?

A8: See response to Q3 above.

Q9: Section 1.1.3.3.: Once renovated, what commitments to space in the renovated Coburn and/or Holmes Hall will UMaine or UMS make?

A9: No, the University is not currently anticipating committing to leasing space in the renovated Coburn and/or Holmes Hall.

Q10: Section 1.1.3.3.: Will UMaine or UMS consider a lease-leaseback structure whereby the private sector takes on the responsibility to plan, design, renovate, finance, operate and maintain both Coburn and Holmes Halls. The private sector then leases the newly renovated and code- and ADA-compliant Coburn and Holmes Hall back to UMaine or UMS? If desired by UMaine or UMS, the private sector can operate and maintain both buildings and associated parcels / land subject to the leaseback agreement. There are other significant benefits for UMaine and UMS to proceed in this manner. In addition, any private financing will be the responsibility of the private sector, not UMaine or UMS, to service and repay.

A10: The University has not identified any needs or requirements that would indicate a preference for a lease-leaseback structure, however they remain open to all possibilities if in alignment with University priorities.



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Q11: Section 1.1.3.3. Does UMaine or UMS require the Respondent to include a construction / contracting firm as part of the RFQ submission? It was unclear from Section 1.1.3.3, Paragraph 1.

A11: No, the inclusion of a construction/contracting firm is not required as part of the RFQ submission. The University does require that Respondent teams clearly demonstrate the capacity to design, renovate, finance, operate, and maintain the project to be deemed qualified for the RFP process.

Q12: Section 1.1.3.3. Does UMaine or UMS anticipate the RFP will mandate or prefer local firm involvement for any of the primary roles - design, development, construction, finance, operations, maintenance? If so, to what extent or percentage? What about WMBE firm involvement? The answers may influence selection of certain team members included in the RFQ response.

A12: See answer to Q6 above. The University encourages but does not mandate the involvement of local firms.

Q13: Appendix F. To be competitive, the Market Analysis cites the need for UMaine to provide surface parking to future tenants of Coburn and Holmes Halls. Has UMaine agreed to provide such parking? If so, in which lot(s) and approximately how many spaces? Would UMaine consider leasing to the private sector to convert to parking additional University land that is in close proximity to Coburn and Holmes Halls but which currently is not used as parking?

A13: The University has parking capacity adjacent to Coburn and Holmes and may make some of this space available to the selected development partner(s). The University acknowledges that the selected development partner(s) will evaluate if they want to



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include additional parking on the site adjacent to the buildings as part of their development.

Q14: Appendix F: How advanced are discussions with ASCC and College of Natural Sciences, Forestry and Agriculture regarding the future space needs of each? During an RFP, will these and other groups at UMaine and UMS be available to meet with shortlisted developers?

A14: In a recent expansion plan, the ASCC outlined a need for an additional 5,600 ASF of office space on campus to serve the growing functions of the organization. In addition, the College of Natural Sciences, Forestry, and Agriculture has commissioned a planning group to explore the construction of a new building to create classrooms, labs, office, and meeting spaces for faculty, staff, and students in the life sciences. The University will make no guarantees around the potential leasing of space in the buildings. However, the University may consider scheduling meetings with ASCC and the College of Natural Sciences, Forestry, and Agriculture after a development partner(s) is selected.

DISCLAIMER:

The University of Maine System makes no representations or endorsements of the companies and individuals listed. This list is provided for informational purposes only and does not constitute a representation or warranty by the University that the listed entities are competent, qualified, or shall otherwise be considered for selection in connection with the University's RFQ.

Notification of Interest Submittals / Pre-Bid Conference Participants					
#	Respondent Company Name	Organization's Intended Role in the Project	Contact Name	Office Phone	Email Address
1	Bateman Partners	Developer/Owner	David Bateman	(207) 772-2992	david@batemanpartnersllc.com
2	Bergmeyer	Architecture and Design	Zach Smith	617-542-1025	zsmith@bergmeyer.com
3	Centergreen	Development Consultant	Jerry Pucillo	617-510-4503	jerry@centergreen.com
4	Concord Eastridge	Developer	Mike Haller	703.563.9810	MHaller@concordeastridge.com
5	Consigli Construction Co., Inc.	General Contractor / Design Builder / Historic Restoration Expertise	Matt Tonello	207-253-5749	MTonello@consigli.com
6	CRC Companies LLC	Developer / Project P3 Lead	Tad Guleserian	617-721-2791	tad.guleserian@crccompanies.com
7	CUBE 3 Architects	Developer's Planning/Design Partner	Bruce Ignacio	617.480.3829	bignacio@cube3.com
8	Developers Collaborative	Developer / Historic Development Consultant	Michael Lyne	207-522-3055	mlyne@dcmaine.com
9	Elliott Sidewalk	Developer	Marilyn Talabis	443-391-8420	mtalabis@elliottsidewalk.com
10	EYP Architecture & Engineering	Prime Architect	Kelly Bliss	978-799-7111	kbliss@eypae.com
11	Finegold Alexander Architects	Architect / Historic Preservation	Rebecca Berry	617-227-9272x217	rberry@faainc.com
12	MAKE YOUR MARKeting	Engineering Services	Kim Sousa	617-413-1643	kim@imakeyourmarketing.com
13	KSQ Design	Architect, Designer, Interior Design, LEED Consultant	Nicholas Wise	918-770-9273	nwise@ksq.design
14	LeMessurier	Structural Engineering/Building Envelope Consultant	Kellie Jackson	617-868-1200 x402	kjackson@lemessurier.com
15	Northern Hospitality	Oversee design, development, construction, pre-opening, and operation	Chris Thompson	207.347.1614	parallaxpartners@gmail.com
16	Perkins Eastman	Architect	Jess Charlap	617-449-4047	j.charlap@perkinseastman.com
17	Pike Properties	Developer, contractor, property management and maintenance	Timothy McClary	207-942-6310	tmccclary207@gmail.com
18	Portland Foreside Development	Developer	Kevin Costello	617.821.0262	kdc@portlandforeside.com
19	Radnor Property Group	Developer	Emily Holl	610-644-3090, ext 6	eholl@radnorproperty.com
20	Sacyr	Developer, General Contractor and Operator	Marcos Boto Menendez	786 773 5847	mboto@sacyr.com
21	Sanborn Head & Associates	Geotechnical/Environmental	Maureen Duffy	603.415.6157	mduffy@sanbornhead.com
22	SMRT Architects & Engineers	Lead Architect	Kathy Dionne	877-700-7678	KDIONNE@smrtinc.com
23	Suffolk	General Contractor	Patricia Fillipone	617-652-9327	PFilippone@suffolk.com
24	Thornton Tomasetti	Engineer Consultant: Structural, Building Envelope, Sustainability	Jessica Kandel	207-310-3868	Jkandel@ThorntonTomasetti.com
25	Vantage Technology Consulting Group	IT, Audiovisual & Security programming and design	Abigail Day	978-610-3853	abigail.day@vantaqetcq.com
26	WBRC Architects and Engineers	Designer (architects, interiors, and engineers)	A. Ray Bolduc	207.947.4511 x244	ray.bolduc@wbrc.com
27	Windover Construction	Construction Management	Tracey Hartford	978-720-8244	tracey@windover.com

MEETING NOTES

Project: RFQ#2021-009 University of Maine (UMaine) Public Private Partnership (P3) for Historical Buildings Redevelopment

Meeting: Pre-Bid Event

Date: October 14, 2020

Time: 1:00 – 2:00 PM EST

1. SUMMARY AND OBJECTIVES OF PROJECT

1.1 Meeting Introduction

- Brailsford & Dunlavey (B&D) introduced as UMaine's development advisor.
- B&D reviewed agenda items.

1.2 Opening Comments

Derek Houtman (DH), Strategic Sourcing Manager, University of Maine System (UMS)

- DH introduced the University of Maine System team
- DH reviewed the purpose of the Pre-Bid Event:
 - o Provide background and information on the RFQ and project opportunity.
 - o Facilitate the formation of fully formed teams to respond to the RFQ.
- DH highlighted UMS protocol regarding Q&A:
 - o No questions will be answered on this call.
 - o All questions must be submitted electronically to UMSresponses@maine.edu by the end of the day 10/15/2020.
 - o Participants can also post questions in the chat section.
 - o All questions and responses will be posted on UMS website by the end of the day 10/16/2020.

1.3 UMaine Introduction

- Student population includes traditionally-aged undergraduate, graduate, and PhD students.
- UMS's flagship campus and center of majority of research activity in the state.
- Primary educational institution among several others in the Bangor area.
- UMaine's mission centers around teaching, research, and public service.
- UMaine and the state of Maine have remained stable during the COVID-19 pandemic.

- Extensive testing has been happening on campus. UMaine has had limited positive cases since August 2020.
- UMaine's recent and continuous growth.
 - Recent Alford Foundation investment:
 - \$240M to UMaine System.
 - \$90M to UMaine for funding athletic facilities upgrades as well as engineering programs.
 - Initiatives have had positive impact on the recruitment of students, faculty, and staff.
- UMaine's commitment to the economic development of the local region.
 - Recruitment of companies to the area
 - Several European companies in land-based sciences and agricultural industries are coming to Maine to build new facilities. These companies generate significant economic and employment demand.
 - Project Opportunity
- UMaine is committed to the redevelopment of Coburn and Holmes Halls.
- The halls are located at the heart of campus, proximate to many key buildings.
- The shell and structure of the buildings are in good shape.
- UMaine is not currently utilizing the buildings.
 - UMaine's Office of Innovation and Economic Development and the UMS team wishes to identify partners/tenants/collaborators to support the project development.
 - General conditions of the buildings:
 - Both buildings were built in late 1800s.
 - Coburn is approximately 18,000 GSF and Holmes is approximately 14,000 GSF.
 - Both comprise part of campus's historic core and would be perfect for uses that advance history of UMaine.
 - UMaine is spending \$100,000 in operating expenses and upkeep on the buildings each year.
 - Each building has approximately \$4M to \$5M in deferred maintenance needs. B&D conducted a market analysis that suggested the following uses would be viable:
 - Office space for research, UMaine partners and government agencies, and partner organizations that want to be co-located on campus.
 - A boutique hotel to accommodate demand from campus activities such as athletic events/conferences/university events, as well as tourism demands. There are currently few hotels in the area, none of which are boutique hotels that could serve UMaine for this purpose.
- Potential multi-family housing for graduate students and young faculty.
 - UMaine is also very open to and interested in other ideas that add value to the campus environment.
 - UMaine is looking to transfer all risk related to designing, renovating, financing, operating, and maintaining the facilities to a partner through a long-term lease structure.

2. PARTNER SOLICITATION AND SELECTION PROCESS

2.1 Solicitation Process

- DH:
 - o The RFQ is step one in a two-part solicitation process. The RFQ will be followed by an RFP.
 - o The goal of the RFQ is to solicit interest and identify respondents that are qualified to be a part of the RFP process.
 - o An additional goal is to help interested parties identify one another
 - o When submitting a response to the RFQ, teams identify the primary respondent, and only the primary respondent will be guaranteed to participate in the RFP.
- This allows respondents to be nimble and provide us with the best team.

2.2 Selection Criteria

- DH:
 - o UMS and UMaine have provided the market analysis that B&D has done on our behalf as part of this RFQ. If you have ideas of how these buildings could work with the University's strategic goals, we welcome creative responses and uses of these spaces.
 - o It is important to note that the concept must be strategically aligned with UMaine's vision. UMaine's mission and vision is outlined in the RFQ.
 - o Respondent team must be able to demonstrate their ability to design, renovate, finance, operate, and maintain the project. Looking for likely more than one entity to deliver on this purpose.

2.3 RFQ Schedule

- DH:
 - o We released an addendum 10/14 , clarifying that submitting a Notification of Interest and participation in this pre-bid event is not required to submit a response to the RFQ.
 - o Deadline for questions is EOD 10/15, and we will post responses to those questions on UMS website by EOD 10/16. (Noting that this deadline was extended to 10/20)
 - o Deadline for RFQ submissions is 10/26 by 11:59PM. We must be strict with these deadlines to ensure a level playing field.
 - o We will announce qualified respondents during the week of 11/9. If we decide it is in the best interest of the University to change this timeline, we will do that with an addendum posted to UMS website.

2.4 Opportunity to Submit Written Questions

- DH: If you have any questions and want to submit them in the chat, we will include them in the official questions and answers. You may also

email us with questions. Questions and responses will be publicly available to all parties.

2.5 Additional Comments from UMaine and UMS Team

- DH: Thank you all for joining and showing interest. There are more than 50 participants on this call. This is a great project and unique opportunity to plant a flag on Maine's flagship campus.
- UM: This is our first foray into a public-private partnership. There might be future opportunities around this type of structure. It is a vehicle many institutions want to use, and we have great consultants to advise us as we consider expanding this opportunity.
- DH: We will post a list of attendees on UMS website. We will also email this list to the full group of interested parties.