

REQUEST FOR QUALIFICATIONS FOR
CAPITAL PROGRAM MANAGEMENT
SERVICES

THE UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION
RFQ No.: PM-2019

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SERVICES
The University of Texas System Administration
RFQ No.: PM-2019

SECTION 1 – GENERAL INFORMATION & REQUIREMENTS

1.1 **DESCRIPTION OF THE UNIVERSITY OF TEXAS SYSTEM:**

The University of Texas System (“University” or “UT System”) is the largest system of public higher education in Texas and is comprised of 14 educational institutions (“UT institutions”), including eight general academic institutions and six health institutions, located in all geographic regions of Texas, plus the UT System Administration office in Austin, Texas. The University of Texas System is a diverse community of institutions including major research universities, comprehensive academic universities, upper level institutions, comprehensive health science institutions and specialized hospitals.

1.2 **BACKGROUND AND SPECIAL CIRCUMSTANCES:**

UT System’s Capital Improvement Program (CIP) details the long-range plan to preserve and enhance the University’s facility and infrastructure assets. The CIP is a six-year projection of major New Construction and Repair and Rehabilitation (R&R) projects to be implemented and funded from institutional and System-wide revenue sources. Major New Construction and R&R projects are defined in the UT System Regents’ Rules and Regulations as those with a total project cost of \$10,000,000 or more. Projects that are architecturally or historically significant are also identified as major projects regardless of cost. Projects below thresholds or those so delegated are procured and managed by their respective institutional facility departments.

The University’s Capital Improvement Program is currently comprised of 43 major construction projects at 13 Institutions throughout the State, with a total anticipated cost of over \$4.7 Billion.

The Board of Regents has delegated the authority to manage Major Projects on their own behalf to the following Institutions:

- The University of Texas at Arlington
- The University of Texas at Austin
- The University of Texas at San Antonio
- The University of Texas Medical Branch at Galveston
- The University of Texas M. D. Anderson Cancer Center
- The University of Texas Southwestern Medical Center
- The University of Texas Health Science Center at Houston
- The University of Texas Health Science Center at San Antonio
- The University of Texas System Administration

Unless otherwise authorized by the Board of Regents, the U.T. System Office of Facilities Planning and Construction (OFPC) currently has delegated authority to manage Major Projects on behalf of the following institutions:

- The University of Texas at Dallas
- The University of Texas at El Paso
- The University of Texas Permian Basin
- The University of Texas Rio Grande Valley
- The University of Texas at Tyler
- The University of Texas Health Science Center at Tyler

In response to a recent organizational reassessment of UT System Administration, UT System is implementing significant changes in the management and oversight of facilities planning and construction going forward. The resulting reorganization includes outsourcing project management services for Major Capital Projects at the six institutions that do not have delegated authority to manage Major Projects on their own behalf.

The outsourcing of these services will be administered through the newly constituted Office of Capital Projects (OCP), which will maintain oversight and fiduciary responsibilities for all university system capital projects. In addition to future projects, the successful respondent will assume delegated management responsibilities for 19 projects currently underway at seven institutions.

1.3 GENERAL INFORMATION:

The University of Texas System (“Owner”), through the Office of Capital Projects (“University/OCP”) is soliciting statements of qualifications (“Qualifications”) from Project Management firms (“Respondents”) for selection of one Program Management firm to provide Capital Program Management services, in accordance with the terms, conditions, and requirements set forth in this Request for Qualifications.

1.3.1 This Request for Qualifications (“RFQ”) is the first step in a two-step process for selecting a Program Management firm. The RFQ provides the information necessary to prepare and submit Qualifications for consideration and initial ranking by the Owner. Based on the initial ranking, the Owner may select up to five (5) of the top ranked qualified respondents to attend Interviews in the final step of the process.

1.3.2 In the final step of the process, Interviews, the most qualified respondents will be requested to attend an interview with the Owner to confirm the Qualification submittal and answer additional questions. The Owner will then rank the remaining respondents in order to determine the most qualified respondent.

1.3.3 The University anticipates selecting one (1) qualified firm to provide services for projects located at the following U. T. System institutions:

- The University of Texas at Austin Dell Medical School (1 project)
- The University of Texas at Dallas
- The University of Texas at El Paso
- The University of Texas Permian Basin
- The University of Texas Rio Grande Valley
- The University of Texas at Tyler
- The University of Texas Health Science Center at Tyler

- 1.4 PUBLIC INFORMATION: All information, documentation, and other materials submitted in response to this solicitation are considered non-confidential and/or non-proprietary and are subject to public disclosure under the Texas Public Information Act (*Texas Government Code*, Chapter 552.001, *et seq.*) after the solicitation is completed.
- 1.4.1 The Owner strictly complies with all statutes, court decisions, and opinions of the Texas Attorney General with respect to disclosure of RFQ information.
- 1.5 TYPE OF CONTRACT: Any contract resulting from this solicitation will be in the form of an Agreement Between the Board of Regents, The University of Texas System, Owner, and Program Manager, a draft copy of which is attached to this RFQ.
- 1.6 CLARIFICATIONS AND INTERPRETATIONS: Any clarifications or interpretations of this RFQ that materially affect or change its requirements will be posted by the Owner as an addendum on the OFPC web site (<https://www.utsystem.edu/offices/facilities-planning-and-construction/current-opportunities>). It is the responsibility of all respondents to obtain this information in a timely manner. All such addenda issued by the Owner before the proposals are due as part of the RFQ, and respondents shall acknowledge receipt of and incorporate each addendum in its Qualifications.
- 1.6.1 Respondents shall consider only those clarifications and interpretations that the Owner issues by addenda seven (7) business days prior to the submittal deadline. Interpretations or clarifications in any other form, including oral statements, will not be binding on the Owner and should not be relied on in preparing Qualifications.
- 1.7 ROLE OF OCP: The Office of Capital Projects oversees the delivery of major capital projects as the Owner's representative for the University of Texas System, including its various campus institutions listed in Section 1.3 of this RFQ. As the Owner's representative, OCP is responsible for providing oversight and quality assurance for outsourced services while ensuring consistency, transparency, and regulatory compliance to key stakeholders.
- 1.8 SUBMISSION OF QUALIFICATIONS:
- 1.8.1 DEADLINE AND LOCATION: The Owner will receive Qualifications at the time and location described below.
- Richard DeLeon, AIA
Director of Project Management
The University of Texas System
Office of Capital Projects
210 W. 7th Street
Austin, Texas 78701
- May 2, 2019 – 2:00PM
- 1.8.2 Submit twelve (12) identical copies of the Qualifications and one (1) PDF copy on flash drive. An original signature must be included on the "Respondent's Statement of Qualifications and Ability to Undertake the Project" document submitted with each copy.
- 1.8.3 Submit one (1) signed original HSP in pdf format via email to: utconsthsp@utsystem.edu. Proposer must include the following information in the e-mail submission:
Subject Line: RFQ #, Project Name, Due Date, HUB Contracting Plan
Body: Proposer's Company name and the name of the contact person who prepared the HSP

- 1.8.4 Late received Qualifications will be returned to the respondent.
- 1.8.5 The Owner will not acknowledge or receive Qualifications that are delivered by telephone, facsimile (fax), or electronic mail (e-mail).
- 1.8.6 Properly submitted Qualifications will not be returned to respondents.
- 1.8.7 Qualifications materials must be enclosed in a sealed envelope (box or container) addressed to the Point-of-Contact person; the package must clearly identify the submittal deadline, the RFQ number, and the name and return address of the respondent.
- 1.9 POINT-OF-CONTACT: The Owner designates the following person as it's representative and Point-of-Contact for this RFQ. Respondents shall restrict all contact with the Owner and direct all questions regarding this RFQ, including questions regarding terms and conditions and technical specifications, to:
- Richard DeLeon, AIA
Director of Project Management
The University of Texas System
Office of Capital Projects
210 W. 7th Street
Austin, TX 78701
- Email: rdeleon@utsystem.edu
- 1.10 EVALUATION OF QUALIFICATIONS: The evaluation of the Qualifications shall be based on the requirements described in this RFQ. All properly submitted Qualifications will be reviewed, evaluated, and ranked by the Owner. The top five or fewer ranked respondents may be selected by the Owner to participate in step two of the selection process.
- 1.10.1 Qualifications shall not include any information regarding respondent's fees, pricing, or other compensation.
- 1.11 OWNER'S RESERVATION OF RIGHTS: The Owner may evaluate the Qualifications based on the respondent's ability to perform all or any portion of the anticipated services. The Owner reserves the right to divide the Project into multiple parts, to reject any and all Qualifications and re-solicit for new Qualifications, or to reject any and all proposals and temporarily or permanently abandon the procurement of these services. Owner makes no representations, written or oral, that it will enter into any form of agreement with any respondent to this RFQ and no such representation is intended or should be construed by the issuance of this RFQ.
- 1.12 ACCEPTANCE OF EVALUATION METHODOLOGY: By submitting its Qualifications in response to this RFQ, respondent accepts the evaluation process and acknowledges and accepts that determination of the "most qualified" firm will require subjective judgments by the Owner.
- 1.13 NO REIMBURSEMENT FOR COSTS: Respondent acknowledges and accepts that any costs incurred from the respondent's participation in this RFQ shall be at the sole risk and responsibility of the respondent.
- 1.14 PRE-SUBMITTAL CONFERENCE: A pre-submittal conference will be held at the time and location described below. Attendance at the pre-submittal conference is optional.

April 18, 2019
2:00 p.m. – 3:00 p.m.
The University of Texas System Administration Building
Room 2.206
210 W. 7th Street
Austin, TX 78701

1.15 ELIGIBLE RESPONDENTS: Only individual firms or lawfully formed business organizations may apply (This does not preclude a respondent from using consultants.) The Owner will contract only with the individual firm or formal organization that submits a Qualification.

1.16 HISTORICALLY UNDERUTILIZED BUSINESSES' SUBMITTAL REQUIREMENTS: It is the policy of The University of Texas System and each of its component institutions, to promote and encourage contracting and subcontracting opportunities for Historically Underutilized Businesses (HUB) in all contracts. Accordingly, the Office of Capital Projects (OCP) has adopted Exhibit H, Policy on Utilization of Historically Underutilized Businesses (See attached). The Policy applies to all contracts with an expected value of \$100,000 or more. If OCP determines that subcontracting opportunities are probable, then a HUB Subcontracting Plan is a required element of the Qualifications. Failure to submit a required HUB Subcontracting Plan will result in rejection of the Qualifications.

1.16.1 STATEMENT OF PROBABILITY:

The University of Texas System, Office of Capital Projects (OCP), has determined that subcontracting opportunities are probable in connection with this procurement solicitation. Therefore, a HUB Subcontracting Plan (HSP) is required as a part of the respondent's Qualifications. The respondent shall develop and administer a HSP as a part of the respondent's Qualifications in accordance with the OCP Policy on Utilization of Historically Underutilized Businesses (HUB), Exhibit H.

1.16.2 Refer to Exhibit H, Policy on Utilization, Historically Underutilized Business (attached) and the Summary of Requirements for a detailed list of attachments required with the Qualifications. Editable versions of the HUB Subcontracting Plans are available on The University of Texas System website at <http://www.utsystem.edu/hub/hubforms.html>.

1.16.3 The “Statement of Probability” determines the probability for subcontracting opportunities. This determination will clarify which attachments, detailed in Figure 1, will be required to be completed and returned.

1.16.4 Submit one (1) signed original HSP in pdf format via email to: utconsthsp@utsystem.edu. Proposer must include the following information in the e-mail submission:

Subject Line: RFQ #, Project Name, Due Date, HUB Contracting Plan

Body: Proposer’s Company name and the name of the contact person who prepared the HSP

For questions regarding the HUB Subcontracting Plan (HSP) contact:

HUB Coordinator: Stephanie Park
 972-883-5377
 spark@utsystem.edu

1.17 SALES AND USE TAXES: Section 151.311, Tax Code, as amended effective October 1, 1993, permits the purchase free of state sales and use taxes of tangible personal property to be incorporated into realty in the performance of a contract for an improvement to realty for certain exempt entities that include The University of Texas System. The section further permits the purchase tax-free of tangible personal property (other than machinery or equipment and its

accessories and repair and replacement parts) for use in the performance of such a contract if the property is "necessary and essential for the performance of the contract" and "completely consumed at the job site." In addition, the section permits the purchase tax-free of a tangible service for use in the performance of such a contract if the service is performed at the job site and if "the contract expressly requires the specific service to be provided or purchased by the person performing the contract" or "the service is integral to the performance of the contract."

- 1.18 CERTIFICATION OF FRANCHISE TAX STATUS: Respondents are advised that the successful respondent will be required to submit certification of franchise tax status as required by State Law (H.B. 175, Acts 70th Leg. R.S., 1987, Ch. 283, p. 3242). The contractor agrees that each subcontractor and supplier under contract will also provide a certification of franchise tax status.
- 1.19 REQUIRED NOTICES OF WORKERS' COMPENSATION INSURANCE COVERAGE: The Texas Workers' Compensation Commission has adopted a new rule, 28 TAC, sec. 110.110, relating to REPORTING REQUIREMENTS FOR BUILDING OR CONSTRUCTION PROJECTS FOR GOVERNMENTAL ENTITIES. The rule implements sec. 406.096, Texas Labor Code, which requires workers' compensation insurance coverage for all persons providing services on a building or construction project for a governmental entity.
- 1.20 PREVAILING WAGE RATE DETERMINATION: Respondents are advised that the Texas Prevailing Wage Law will be administered in accordance with the policies and procedures set forth in the U. T. System document, entitled "Prevailing Wage Guidelines." A copy is attached to the Special Conditions. The penalty for violation of prevailing wage rates has been increased from \$10.00 per underpaid worker per day or portion thereof to \$60.00.
- 1.21 DELINQUENCY IN PAYING CHILD SUPPORT: Under Section 231.006, Family Code, the vendor or applicant certifies that the individual or business entity named in this contract, bid, or application is not ineligible to receive the specified grant, loan, or payment and acknowledges that this contract may be terminated, and payment may be withheld if this certification is inaccurate.
- 1.22 OWNER'S POLICY REGARDING RECEIVING BENEFITS, GIFTS AND HONORARIA: This administrative policy defines, and in most cases restricts, the benefits, gifts, honoraria and other entertainment activities all UT System staff may be exposed to and supplements any provisions of state law or UT System rule or policy that is less restrictive. The policy covers "Conflicts of Interest" not allowed and items typically allowed. UT System recommends that all respondents review the policy, which is attached as an Exhibit, and endeavor to use appropriate judgment related to the requirements and actions defined in the policy, during both the procurement phase and the contracting phase.
- 1.23 DISCLOSURE OF INTERESTED PARTIES STATUTE: In its proposal, Respondents must agree to comply with Section 2252.908, Texas Government Code ("Disclosure of Interested Parties Statute") and 1 Texas Administration Code Sections 46.1 through 46.3 ("Disclosure of Interested Parties Regulations") as implemented by the Texas Ethics Commission ("TEC"), including, among other things, providing the TEC and University with the information required by the Disclosure of Interested Parties Statute and the Disclosure of Interested Parties Regulations on the form promulgated by the TEC and set forth in APPENDIX EIGHT. The form will be required to be submitted to Owner prior to the countersigning of the final agreement and not submitted with this RFQ.

SECTION 2 – EXECUTIVE SUMMARY

2.1 PROJECT PLANNING SCHEDULE:

- Owner conducts Pre-Submittal Conference Refer to Section 1.14
- Owner receives Request For Qualifications Refer to Section 1.8
- Owner interviews Respondents (if applicable) To be determined
- Owner executes Agreement(s) To be determined

2.2 GENERAL SCOPE OF WORK:

2.2.1 This RFQ and the associated resulting Agreement for Program Management Services are intended to allow for a wide range of services. The general scope of work is to provide selective or comprehensive project management, construction management, and inspection services as may be specifically identified in the Work Order(s) issued by the Owner. Successful respondents will provide project management services to the Owner and report to an OCP Designated Representative for the particular tasks or projects to which they are assigned. The successful respondent will in no manner be expected to perform professional design work, nor act in capacity of Architect or Engineer of Record for projects, nor be at risk for construction of the project. The extent of services may include any one or a combination of the following:

- 2.2.1.1 Provide staff proficient in the areas of program management, project management, construction management, construction inspection, safety, cost and schedule control specialties, administration, including the Historically Underutilized Business program, accounting and construction project auditing, and other areas of expertise normally associated with excellence in design and construction of capital projects.
- 2.2.1.2 Manage the planning, design and execution of complex higher education and health care capital projects by providing project leadership, communication, coordination and conflict resolution to ensure project goals are met.
- 2.2.1.3 Provide coordination of institution stakeholders, professional service providers, local jurisdictions, UT System Administration offices, and external agencies as necessary.
- 2.2.1.4 Manage project from initiation through completion of project definition, design, construction, complete building commissioning, and warranty as may be required. The successful respondent will be responsible for project budgets and schedules, and will actively lead in the procurement of design and construction services. Drive progress of consultants to achieve expected functionality and recommend alternatives to recover schedule slippage. Facilitate timely decisions by campus representatives and report progress and issues impacting the project goals to stakeholders. FFE planning, design, coordination, and installation services when authorized by the Owner.
- 2.2.1.5 Apply OCP project control processes to track and report progress, for consistency, to mitigate risks, and to assure compliance with Board of Regents Rules & Regulations and applicable state and federal statutes and regulations.
- 2.2.1.6 Collaborate with OCP in the generation and maintenance of required project data supporting the Owner's cloud-based project management information system. Oracle Primavera Unifier is currently the Owner's primary system of record for managing, reporting, and analyzing the current and historical execution of the CIP, and is used to collaborate with the institutions, other UT System offices and external service providers supporting critical System wide programs. Collaborate

with UT System Office of HUB Programs in the generation and maintenance of required project HUB data utilizing the owner's cloud-based Contract Compliance System.

- 2.2.1.7 Ensure project compliance with all applicable federal, state, and municipal laws, codes and statutes, and Board of Regents rules and policies. Refer to Attachment 5.5 - U. T. System Risk Mitigation and Monitoring Checklist.
- 2.2.1.8 Ensure design and construction documents comply with project requirements. Facilitate timely review of program, design, and construction documents by the campus, OCP engineers and consultants at Schematic Design, Design Development, and Construction Document phases of the work. Facilitate timely reviews of accessibility, building and fire code compliance, Storm Water Pollution Protection Plan, Historically Underutilized Business Subcontracting Plan, and SECO to avoid delays to the project. Stay current in Codes and Regulation applicable to design and construction, including IBC, IPC, IMC, IFGC, NFPA 1 & 101, TDLR, OSHA, ADA, SECO energy and water conservation compliance requirements, SWPPP, and any special requirements of the building type or local jurisdictions.
- 2.2.1.9 During construction, coordinate and provide support to campus staff in the management of construction activities and processes.
- 2.2.1.10 Review and endorse contracts, contract change proposals, requests for additional services, and proposed changes in project scope for approval by OCP Designated Representative.
- 2.2.1.11 Review and endorse project expenditures for consultant services, service contracts, and construction payment applications for approval by OCP Designated Representative.
- 2.2.1.12 Assist and coordinate with the Office of Risk Management (ORM) to facilitate and administer UT System's Rolling Owner's Controlled Insurance Program (ROCIP), Builder's Risk Insurance Program, and Construction Safety program requirements.
- 2.2.1.13 Assist and coordinate with the Office of Historically Underutilized Businesses Programs (HUB) to facilitate and administer UT System's HUB program requirements.
- 2.2.1.14 The Respondent's Statement of Qualifications must address all services necessary to support the entire project timeline as outlined in the U. T. System Guide to Major Capital Project Delivery, beginning with the Definition Phase requirements. The guide was created to provide easy access to the most current policies, procedures, and resources needed to successfully deliver Major Capital Projects for UT System and its institutions. The full guide, including a printable version, can be accessed online at this address:

<https://www.utsystem.edu/sites/capital-project-delivery-guide>
- 2.2.1.15 Program Management team members will be expected to function near or proximate to the project site and may be located at individual campuses, determined on a project-by-project basis.
- 2.2.1.16 Office space, furniture, supplies, and other equipment necessary to fulfill the service requirements will be negotiated. All staff will be expected to comply with all applicable rules and policies of the Owner with regard to working on a higher education campus or in an academic or health care facility. The use of any Owner provided equipment and/or supplies will be defined in each proposal and subsequent work authorization. In the event the team must make a purchase, prior

approval must be obtained from the OCP Designated Representative. Maintain consistency in management practices, communications, and reporting across all projects assigned under the Agreement.

- 2.2.2 Program Management services provider shall respond to requests for service within a maximum of 14 calendar days after notice from the OCP Designated Representative. The project management team or individuals assigned must be available for the duration of the individual Program Management Work Order, or as otherwise negotiated. Submittals to this RFQ must acknowledge that relief from these assignments may only be provided by the Owner, in advance, in writing including approval of a replacement satisfactory to the OCP representative.
- 2.2.3 The Program Management staff will be under contract with The University of Texas System, and will report to the OCP Designated Representative. Information regarding current staffing on underway projects is identified in Attachment 5.3. Roles and responsibilities are defined in the Job Information Forms (JIFs) attached hereto as Attachment 5.7:
 - 2.2.3.1 PROGRAM DIRECTOR / ACCOUNT EXECUTIVE – Minimum 15 years in executive project management with experience in higher education academic and healthcare projects. Experienced in direct, as well as oversight management of up to 30 active projects with a value between \$300M and \$1.5B. Demonstrated leadership in risk management, client care, and service monitoring. Bachelor's degree in architecture, engineering, or construction management. Registration as Professional Architecture or Engineer is preferred.
 - 2.2.3.2 SENIOR PROJECT MANAGER – Minimum 10 years in project management with experience in higher education, healthcare or institutional projects. Experienced in direct or oversight experience in 3-5 active projects with total value between \$100-\$300M. Executive leadership, oversight, and quality monitoring experience is required. Bachelor's degree in architecture, engineering, or construction management. Registration as Professional Architecture or Engineer is preferred.
 - 2.2.3.3 PROJECT MANAGER / CONSTRUCTION MANAGER - Minimum 10 years in project management with experience in higher education, healthcare or institutional projects. Bachelor's degree in architecture, engineering, or construction management. Registration as Professional Architecture or Engineer is preferred. This includes Project Manager II, & Resident Construction Manager positions included in OCP JIFs attached.
 - 2.2.3.4 PROJECT SPECIALIST / ANALYST - Generally a minimum of 7 years experience in design or construction, with specific expertise in design cost modeling, construction budget and/or schedule analysis, cost/invoice reconciliation, and process verification. This is equivalent to Project Analyst JIF attached.
 - 2.2.3.5 CONSTRUCTION INSPECTOR - Generally includes a minimum of 10 years in construction of complex higher education or healthcare projects. This includes Senior Construction Inspector, Construction Inspector II and Construction Inspector positions included in OCP JIFs attached.
- 2.2.4 In order to insure continuity of institutional knowledge, project knowledge, and project objectives, and in order to reduce project and compliance risk with ongoing and active design and construction projects, successful Respondent is requested to consider employing former U. T. System Office of Facilities and Planning and Construction staff, in particular those staff listed in Attachment 5.3.

2.3 RESPONDENT’S RESPONSIBILITY TO ASSUME MANAGEMENT OF PROJECTS:

The projects identified in Attachment 5.3 are currently underway in various stages of planning, design, construction, or warranty. Details regarding the projects, including scope, total project cost, and status are provided in Attachment 5.9. For each project listed in Attachment 5.3, successful Respondent will be required to submit a conceptual project execution plan as part of the RFQ. Within thirty (30) days of contract execution, the successful respondent will be required to submit a detailed project execution and transition plan including staffing names and organizational charts for approval by the OCP Designated Representative. Successful Respondent will assume responsibility for management of these projects immediately upon OCP Designated Representative’s approval of the plans.

2.4 QUALIFICATIONS:

2.4.1 Each respondent shall provide typical qualifications of the program and project management staff they will provide with their response.

2.4.2 RESPONDENTS SHALL INDICATE HOW QUICKLY THEY CAN RESPOND IN AN EMERGENCY SITUATION. Ability to respond with qualified staff and timely response will be considered essential criteria for the award for contract

2.5 DURATION OF CONTRACT: The duration of this service contract shall be for an initial period of two years with two consecutive two-year renewal options at the discretion of OCP.

2.6 WORK SPECIFICALLY EXCLUDED: The successful Respondent will in no manner be expected to perform professional design work, nor act in capacity of Architect or Engineer of Record for projects, nor be at risk for construction of the project.

2.7 EVALUATION CRITERIA:

- Overall adherence to requirements of the RFQ and quality of responses shown in Respondent’s statement of qualifications.
- Respondent’s experience in providing successful program management services for higher education academic or health care facilities
- Ability to provide services identified in this RFQ at institutions identified in Section 1.3.3.
- Proven programs to ensure, measure, and improve efficiencies, quality, and customer satisfaction.

SECTION 3 – REQUIREMENTS FOR STATEMENT OF QUALIFICATIONS

Respondents shall carefully read the information contained in the following criteria and submit a complete statement of Qualifications to all questions in Section 3 formatted as directed in Section 4. Incomplete Qualifications will be considered non-responsive and subject to rejection.

3.1 CRITERIA ONE: RESPONDENT’S STATEMENT OF QUALIFICATIONS AND AVAILABILITY TO UNDERTAKE THE PROJECT (Maximum of two (2) printed pages per question)

3.1.1 Provide a statement of interest for the program services including a narrative describing the Prime Firm’s and Project Team’s unique qualifications as they pertain to this particular project.

- 3.1.2 Provide a statement on the availability and commitment of the Prime Firm and its principal(s) and assigned professionals to undertake the project.
- 3.1.3 Provide a brief history and important statistics about the Program Management firm including its size, principle location, and ownership.
- 3.1.4 Indicate consultants if any are proposed.

3.2 CRITERIA TWO: PRIME FIRM'S ABILITY TO PROVIDE SERVICES

- 3.2.1 Provide the following information for the Prime Firm:
 - Legal name of the company as registered with the Secretary State of Texas
 - Address of the office(s) that will be providing services
 - Number of years in business
 - Type of Operation (Individual, Partnership, Corporation, Joint Venture, etc...)
 - Number of Employees by skill group
 - Annual revenue totals for the past ten (10) years
- 3.2.2 Provide the three (3) most recent audited financial statements documenting your firm's financial stability.
- 3.2.3 Is your company currently for sale or involved in any transaction to expand or to become acquired by another business entity? If yes, please explain the impact both in organizational and directional terms.
- 3.2.4 Provide any details of all past or pending litigation or claims filed against your company that would affect your company's performance under a Contract with the Owner.
- 3.2.5 Is your company currently in default on any loan agreement or financing agreement with any bank, financial institution, or other entity? If yes, specify date(s), details, circumstances, and prospects for resolution.
- 3.2.6 Does any relationship exist by relative, business associate, capital funding agreement, or any other such kinship between your firm and any Owner employee, officer or Regent? If so, please explain.
- 3.2.7 Provide a claims history under professional liability insurance for the past five (5) years for the Prime Firm and any team members proposed to provide other professional or technical services.

3.3 CRITERIA THREE: PROGRAM MANAGEMENT FIRM

- 3.3.1 Describe, in graphic and written form, the proposed project teams by region or specific campus. If actual staffing is still being negotiated with candidates, indicate this. Show assignments and lines of authority and communication for principals and key staff that will be involved in the project. Indicate the estimated percent of time these individuals will be involved in the project for design, construction, and warranty phases.
- 3.3.2 Based upon the projects identified in Attachment 5.3, confirm the Respondent firm's capacity to currently manage the anticipated workload.
- 3.3.3 Provide resumes giving the experience and expertise of the principles and key project

management staff that represent the level of expertise that will be provided in the engagement, including their experience with similar projects or contracts for services and their number of years with the prime firm. Identify which of these individuals is a full time employee (FTE) of the Respondent firm and which is a contract employee.

- 3.3.4 Clearly identify the members of the proposed team who worked on the listed projects in Criteria 3.4 and describe their roles in those projects.
- 3.3.5 Describe the firm's Continuous Improvement and customer satisfaction processes, metrics, and results for the listed programs/projects in Criteria 3.4.
- 3.3.6 For each key individual that the firm proposes:
 - Identify the individual and provide a brief resume.
 - Describe the individual's proposed role in the program.
 - If a consultant is proposed, provide a brief history of the firm, including projects that the prime firm and the consultant have worked together on during the last five years.
 - Describe the individual's experience with the State of Texas HUB Program.

3.4 CRITERIA FOUR: RESPONDENT'S PERFORMANCE ON PAST REPRESENTATIVE PROJECTS:

- 3.4.1 List a maximum of five (5) projects or contracts for Program Management Services for which the Program Management firm provided or is providing Program Management services which are most related to this engagement. List the programs in order of priority, with the most relevant project listed first. Provide the following information for each project listed:
 - Program name
 - Individual project names and locations
 - Program/Project Owner
 - Color images (photographic or machine reproductions)
 - Final Construction Cost, including Change Orders
 - Final project size in gross square feet
 - Actual start and finish dates for the program and projects
 - Actual Notice To Proceed and Substantial Completion dates for the project
 - Description of professional services provided by the program management firm
 - Individual Program and Project Manager as well as other key staff responsible for coordinating the day to day work and overall success
 - Description of why the services provided are relevant to this engagement
 - Names of consultants used, if any, and their expertise
 - Clearly identify the members of the proposed team who worked on the listed projects in Criteria 3.4 and describe their roles in those projects.
 - Final HUB Participation (if applicable)

References shall be considered relevant based on specific program and project participation and experience with the Respondent. The Owner may contact references during any part of this process. The Owner reserves the right to contact any other references at any time during the RFQ process. Provide references for each program listed above.

- The Owner's name and representative who served as the day-to-day liaison for the projects or contracts for program management services listed in 3.4.1. Include a telephone number.

- Construction firm's name and representative who served as the day-to-day liaison for the projects listed, including telephone number.
 - Design firm's name and representative who served as the day-to-day liaison for the projects listed, including telephone number.
- 3.4.2 Describe the prime firm's past performance on projects for The University of Texas System within the last five years. If the prime firm has not previously provided Project Management services for The University of Texas System, then identify and describe the prime firm's past performance on projects for the largest institution of higher education or health care for which it has provided professional services within the last five years.
- Clearly identify the members of the proposed team who worked on the listed projects in Criteria 3.4 and describe their roles in those projects.

3.5 CRITERIA FIVE: RESPONDENT'S KNOWLEDGE OF BEST PRACTICES

- 3.5.1 Describe the firm's program and project management methodology and its process for integrating OCP and managed institutional processes and standards into the management of specific projects and/or into the delivery of specific services provided. Describe the firm's reporting and quality assurance program explaining the methods used and how the firm will assist to maintain quality control during all phases of assigned projects.
- Describe the firm's process of ongoing evaluation of their staff performance with the Owner's representatives and what methodology is utilized to assure Owner satisfaction with firm's performance.
 - Describe the firm's process for monitoring their staff's ongoing work on continuous basis to assure that the firm has current knowledge of responsibilities and accomplishments of their staff assigned to the project.
 - Describe the firm's process for monitoring and managing performance of 2nd tier and/or consultant firms and/or individuals assigned to projects on the firm's behalf.
 - Provide specific examples and associated reports for how these techniques or procedures were used for any three programs listed in response to Part Four, (3.4.1).
- 3.5.2 Describe the firm's experience with Alternate Project Delivery Methods. Provide specific examples of how this experience was utilized for any three programs / projects listed in response to Part Four, (3.4.1).
- 3.5.3 Describe the firm's experience and methodology for providing oversight to whole building commissioning.
- 3.5.4 Describe the firm's processes for validating and monitoring assigned project budget and schedule.
- 3.5.5 Describe the firm's experience and methodology for managing HUB participation.
- 3.5.6 Provide examples of monitoring tools and processes for reporting to the Owner regarding project and program performance.

3.6 CRITERIA SIX: RESPONDENT'S ABILITY TO IDENTIFY AND RESOLVE PROBLEMS ON PAST PROJECTS

- 3.6.1 The Respondent remains responsible for the delivery of current and ongoing major capital projects at the institutions identified in Section 1.3.3 of this RFQ. The successful Respondent will actively engage with these institutions in the delivery of the individual projects. Describe your understanding of the administrative challenges and opportunities associated with providing Program Management services for The University of Texas System and project management services to the identified institutions, and your strategy for resolving issues.
- 3.6.2 For any combination of three (3) projects listed in response to Criteria 3.4, describe any conflicts with the Owner, Consultants, Contractor, or subcontractors, and describe the methods your firm used to resolve those conflicts.

3.7 CRITERIA SEVEN: EXECUTION OF OFFER

NOTE TO RESPONDENTS: SUBMIT ENTIRE SECTION WITH RESPONSE.

THIS EXECUTION OF OFFER MUST BE COMPLETED, SIGNED, AND RETURNED WITH THE RESPONDENT'S QUALIFICATIONS. FAILURE TO COMPLETE, SIGN AND RETURN THIS EXECUTION OF OFFER WITH THE QUALIFICATIONS MAY RESULT IN REJECTION OF THE QUALIFICATIONS.

SIGNING A FALSE STATEMENT MAY VOID THE SUBMITTED QUALIFICATIONS OR ANY AGREEMENTS OR OTHER CONTRACTUAL ARRANGEMENTS, WHICH MAY RESULT FROM THE SUBMISSION OF RESPONDENT'S QUALIFICATIONS, AND THE RESPONDENT MAY BE REMOVED FROM ALL PROPOSER LISTS. A FALSE CERTIFICATION SHALL BE DEEMED A MATERIAL BREACH OF CONTRACT AND, AT OWNER'S OPTION, MAY RESULT IN TERMINATION OF ANY RESULTING CONTRACT OR PURCHASE ORDER.

- 3.7.1 By signature hereon, Respondent acknowledges and agrees that (1) this RFQ is a solicitation for Qualifications and is not a contract or an offer to contract; (2) the submission of Qualifications by Respondent in response to this RFQ will not create a contract between the Owner and Respondent; (3) the Owner has made no representation or warranty, written or oral, that one or more contracts with the Owner will be awarded under this RFQ; and (4) Respondent shall bear, as its sole risk and responsibility, any cost which arises from Respondent's preparation of a response to this RFQ.
- 3.7.2 By signature hereon, Respondent offers and agrees to furnish to the Owner the products and/or services more particularly described in its Qualifications, and to comply with all terms, conditions and requirements set forth in the RFQ documents and contained herein.
- 3.7.3 By signature hereon, Respondent affirms that he has not given, nor intends to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with the submitted Qualifications.
- 3.7.4 By signature hereon, a corporate Respondent certifies that it is not currently delinquent in the payment of any Franchise Taxes due under Chapter 171, Texas Tax Code, or that the corporate Respondent is exempt from the payment of such taxes, or that the corporate Respondent is an out-of-state corporation that is not subject to the Texas Franchise Tax, whichever is applicable.

- 3.7.5 By signature hereon, the Respondent hereby certifies that neither the Respondent nor the firm, corporation, partnership or Owner represented by the Respondent, or anyone acting for such firm, corporation, or institution has violated the antitrust laws of this state, codified in Section 15.01, et. seq., Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the Qualifications made to any competitor or any other person engaged in such line of business.
- 3.7.6 By signature hereon, Respondent represents and warrants that:
- 3.7.6.1 Respondent is a reputable company regularly engaged in providing products and/or services necessary to meet the terms, conditions and requirements of the RFQ;
 - 3.7.6.2 Respondent has the necessary experience, knowledge, abilities, skills, and resources to satisfactorily perform the terms, conditions and requirements of the RFQ;
 - 3.7.6.3 Respondent is aware of, is fully informed about, and is in full compliance with all applicable federal, state and local laws, rules, regulations and ordinances;
 - 3.7.6.4 Respondent understands (i) the requirements and specifications set forth in this RFQ and (ii) the terms and conditions set forth in the Contract under which Respondent will be required to operate;
 - 3.7.6.5 Respondent, if selected by the Owner, will maintain insurance as required by the Contract;
 - 3.7.6.6 All statements, information and representations prepared and submitted in response to this RFQ are current, complete, true and accurate. Respondent acknowledges that the Owner will rely on such statements, information and representations in selecting the successful Respondent. If selected by the Owner as the successful Respondent, Respondent will notify the Owner immediately of any material change in any matters with regard to which Respondent has made a statement or representation or provided information.
- 3.7.7 By signature hereon, Respondent certifies that the individual signing this document and the documents made part of the RFQ is authorized to sign such documents on behalf of the company and to bind the company under any agreements or other contractual arrangements, which may result from the submission of Respondent's Qualifications.
- 3.7.8 (Not used)
- 3.7.9 By signature hereon, Respondent certifies as follows:
- 3.7.9.1 "Under Section 231.006, *Texas Family Code*, the vendor or applicant certifies that the individual or business entity named in this contract, bid, or application is not ineligible to receive the specified grant, loan, or payment and acknowledges that this contract may be terminated, and payment may be withheld if this certification is inaccurate."
 - 3.7.9.2 "Under Section 2155.004, *Texas Government Code*, the vendor or applicant certifies that the individual or business entity named in this bid or contract is not ineligible to receive the specified contract and acknowledges that this contract may be terminated, and payment withheld if this certification is inaccurate."
 - 3.7.9.3 "Under Section 2254.004, *Texas Government Code*, the vendor or applicant certifies

that each individual or business entity which is an engineer or architect proposed by Respondent as a member of its team was selected based on demonstrated competence and qualifications only.”

- 3.7.10 By signature hereon, Respondent certifies that no relationship, whether by relative, business associate, capital funding agreement or by any other such kinship exist between Respondent and an employee of any University of Texas component, or Respondent has not been an employee of any University of Texas component within the immediate twelve (12) months prior to your RFQ response. All such disclosures will be subject to administrative review and approval prior to the Owner entering into any contract with Respondent.
- 3.7.11 By signature hereon, Respondent affirms that no compensation has been received for participation in the preparation of the specifications for this RFQ. (ref. Section 2155.004 Texas Government Code).
- 3.7.12 Respondent represents and warrants that all articles and services quoted in response to this RFQ meet or exceed the safety standards established and promulgated under the Federal Occupational Safety and Health Law (Public Law 91-596) and its regulations in effect or proposed as of the date of this solicitation.
- 3.7.13 By signature hereon, Respondent signifies his compliance with all federal laws and regulations pertaining to Equal Employment Opportunities and Affirmative Action.
- 3.7.14 By signature hereon, Respondent agrees to defend, indemnify, and hold harmless the State of Texas, all of its officers, agents and employees from and against all claims, actions, suits, demands, proceedings, costs, damages, and liabilities, arising out of, connected with, or resulting from any acts or omissions of Respondent or any agent, employee, subcontractor, or supplier of Respondent in the execution or performance of any agreements or other contractual arrangements which may result from the submission of Respondent’s Qualifications.
- 3.7.15 By signature hereon, Respondent agrees that any payments that may become due under any agreements or other contractual arrangements, which may result from the submission of Respondent’s Qualifications, will be applied towards any debt including, but not limited to, delinquent taxes and child support that is owed to the State of Texas.
- 3.7.16 By signature hereon, Respondent certifies that the only member(s) of the Board of Regents of The University of Texas System, UT System Chancellor, any UT institution president nor any executive officer of the University of Texas System or it’s component institutions that has a financial interest, directly or indirectly, in the transaction that is the subject of the contract is identified below.

Attach additional pages as necessary.

(Name)

(Firm’s Business Title)

(UT System Title)

3.7.17 Execution of Offer: RFQ No.: PM-2019

The Respondent must complete, sign and return this Execution of Offer as part of their submittal response. The Respondent's company official(s) who are authorized to commit to such a submittal must sign submittals. Failure to sign and return this form may subject the submittal to disqualification.

Respondent's Name: _____

Respondent's State of Texas Tax Account No: _____
(This 11 digit number is mandatory)

If a Corporation:

Respondent's State of Incorporation: _____

Respondent's Charter No: _____

Identify by name, each person who owns at least 25% of the Respondent's business entity:

(Name)

(Name)

(Name)

(Name)

Submitted and Certified By:

(Respondent's Name)

(Title)

(Street Address)

(Telephone Number)

(City, State, Zip Code)

(Email Address)

(Authorized Signature)

(Date)

SECTION 4 – FORMAT FOR STATEMENT OF QUALIFICATIONS

4.1 GENERAL INSTRUCTIONS:

- 4.1.1 Qualifications shall be prepared SIMPLY AND ECONOMICALLY, providing a straightforward, CONCISE description of the respondent's ability to meet the requirements of this RFQ. Emphasis shall be on the QUALITY, completeness, clarity of content, responsiveness to the requirements, and an understanding of Owner's needs.
- 4.1.2 Qualifications shall be a MAXIMUM OF FIFTY (50) PRINTED PAGES. The cover, table of contents, divider sheets, HUB Subcontracting Plan (Section 1.13), and Execution of Offer do not count as printed pages.
- 4.1.3 Respondents shall carefully read the information contained in this RFQ and submit a complete response to all requirements and questions as directed. Incomplete Qualifications will be considered non-responsive and subject to rejection.
- 4.1.4 Qualifications and any other information submitted by respondents in response to this RFQ shall become the property of the Owner.
- 4.1.5 The Owner will not compensate respondents for any expenses incurred in Qualifications preparation or for any presentations that may be made, unless agreed to in writing in advance or required by law. Respondents submit Qualifications at their own risk and expense.
- 4.1.6 Qualifications that are qualified with conditional clauses, alterations, items not called for in the RFQ documents, or irregularities of any kind are subject to rejection by the Owner, at its option.
- 4.1.7 The Owner makes no representations of any kind that an award will be made as a result of this RFQ. The Owner reserves the right to accept or reject any or all Qualifications, waive any formalities or minor technical inconsistencies, or delete any item/requirements from this RFQ when deemed to be in Owner's best interest.
- 4.1.8 Qualifications shall consist of answers to questions identified in Section 3 of the RFQ. It is essential to reference the question number with the corresponding answer.
- 4.1.9 Failure to comply with all requirements contained in this Request for Qualifications may result in the rejection of the Qualifications.

4.2 PAGE SIZE, BINDING, DIVIDERS, AND TABS:

- 4.2.1 Qualifications shall be printed on letter-size (8-1/2" x 11") paper and assembled with spiral- type bindings. DO NOT USE METAL-RING HARD COVER BINDERS.
- 4.2.2 Additional attachments shall NOT be included with the Qualifications. Only the responses provided by the respondent to the questions identified in Section 3 of this RFQ will be used by the Owner for evaluation.
- 4.2.3 Separate and identify each criteria response to Section 3 of this RFQ by use of a divider sheet with an integral tab for ready reference.

4.3 TABLE OF CONTENTS:

4.3.1 Submittals shall include a “Table of Contents” and give page numbers for each part of the Qualifications.

4.4 PAGINATION:

4.4.1 Number all pages of the submittal sequentially using Arabic numerals (1, 2, 3, etc.); the Respondent is not required to number the pages of the HUB Subcontracting Plan.

4.5 HUB SUBCONTRACTING PLAN SUBMITTAL:

4.5.1 Submit one original and one signed original HSP in pdf format via email to: utconsthsp@utsystem.edu. Proposer must include the following information in the email submission:

- Subject Line: RFQ#, Project Name, Due Date, HUB Contracting Plan
- Body: Proposer Company Name and the name of the contact person who prepared the HSP

SECTION 5 - ATTACHMENTS TO THE RFO

5.1 Draft Agreement Between the Board of Regents, The University of Texas System, Owner, and Program Manager.

5.2 Exhibit H: Policy on Utilization of Historically Underutilized Businesses

5.3 Project and Staffing Resource List

5.4 Project Phases

5.5 Risk Mitigation and Monitoring Checklist

5.6 Receiving Benefits Gifts and Honoraria – UT System Supplemental Policy

5.7 OCP Job Information Forms (JIF) for selected positions

5.8 Sample Status Report

5.9 Executive Summary Reports

ADDENDUM 01

REQUEST FOR QUALIFICATIONS FOR CAPITAL PROGRAM MANAGEMENT SERVICES

THE UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION
RFQ No.: PM-2019

DUE DATE: May 2, 2019, NLT 2:00 p.m.



Prepared By:
Richard DeLeon, AIA
Director of Project Management
The University of Texas System
Office of Capital Projects
210 W. 7th Street
Austin, TX 78701

REQUEST FOR QUALIFICATIONS FOR
CAPITAL PROGRAM MANAGEMENT SERVICES
The University of Texas System
RFQ No.: PM-2019

Addendum 01

The following information is issued to change, clarify, supplement or further explain the above referenced RFQ. This information shall supersede and take precedence over the information contained in the RFQ in the event of a conflict.

ITEM #001: Replace ATTACHMENT 5.3 with the revised document included herein, dated 4/9/19.

ITEM #002: Replace Section 2.1 with the revised Project Planning Schedule below.

2.1 PROJECT PLANNING SCHEDULE: Key Project planning schedule milestones are:

- | | |
|--|-----------------------|
| ▪ Owner conducts Pre-Submittal Conference | Refer to Section 1.14 |
| ▪ Owner receives Request For Qualifications | Refer to Section 1.8 |
| ▪ Owner interviews Respondents (if applicable) | <i>June 18, 2019</i> |
| ▪ Owner executes Agreement | To be determined |

Note: dates in italics have changed from posted RFQ

End of Addendum 01

ATTACHMENT 5.3

The University of Texas System Office of Capital Projects

Project & Staffing Resource List

Updated: 4/9/2019

Phase	Project Name / Current OFPC Staffing	Substantial Completion	TPC
UT Austin (DMS)			235,000,000*
Programming	102-1188 Austin State Hospital <i>Staffing:</i> Ken Krejci Sr. Project Manager (512) 925-5385	1/31/2023	235,000,000*
UT El Paso			122,550,000
Construction	201-942 Interdisciplinary Research Building <i>Staffing:</i> Brad Huggins Sr. Project Manager (503) 881-9241 Johnny Arvizo Sr. Construction Inspector (915) 490-1307 Joe Romero Construction Inspector II (915) 588-2456	12/18/2019	85,000,000
Bid & Negotiation	201-1113 Sun Bowl Stadium Repairs and Modernization <i>Staffing</i> : TBD	8/15/2019	16,250,000
Definition	201-XXX Glory Road Parking Garage <i>Staffing</i> : TBD	TBD	21,300,000
UT Dallas			199,000,000
Construction	302-906 Science Building <i>Staffing:</i> Robin Connolly Project Manager FFE II (512) 773-5752 Jeremy Head Sr. Project Manager (407) 383-7750 Tom Lund Regional Program Manager (214) 557-2270 Howard Templin Project Manager II (214) 668-0669 Brenda Smith Project Manager II (214) 929-2952 Hank Wilke Sr. Construction Inspector (817) 528-0043 Tracy Davis Sr. Construction Inspector (214) 531-8016 Jerry Jaime Construction Inspector II (469) 559-3337	3/1/2020	101,000,000
Definition	302-1167 Campus Landscape Enhancement Phase III <i>Staffing:</i> Robin Connolly Project Manager FFE II (512) 773-5752 Jeremy Head Sr. Project Manager (407) 383-7750 Tom Lund Regional Program Manager (214) 557-2270 Brenda Smith Project Manager II (214) 929-2952	12/7/2020	18,000,000
Definition	302-1168 Student Union Building Renovation and Expansion <i>Staffing:</i> Robin Connolly Project Manager FFE II (512) 773-5752 Jeremy Head Sr. Project Manager (407) 383-7750 Tom Lund Regional Program Manager (214) 557-2270 Howard Templin Project Manager II (214) 668-0669	12/7/2020	25,000,000
Definition	302-1118 UT Dallas Athenæum <i>Staffing:</i> Robin Connolly Project Manager FFE II (512) 773-5752 Jeremy Head Sr. Project Manager (407) 383-7750 Tom Lund Regional Program Manager (214) 557-2270 Howard Templin Project Manager II (214) 668-0669	12/7/2020	20,000,000

ATTACHMENT 5.3

The University of Texas System Office of Capital Projects

Project & Staffing Resource List

Updated: 4/9/2019

	Phase	Project Name / Current OFPC Staffing	Substantial Completion	TPC
	Definition	302-1239 Parking Structure Phase V <i>Staffing:</i> Jeremy Head Sr. Project Manager (407) 383-7750 Tom Lund Regional Program Manager (214) 557-2270 Brenda Smith Project Manager II (214) 929-2952	3/2020	35,000,000
UT HSC-Tyler				47,000,000
	Construction	801-1096 School of Community and Rural Health <i>Staffing:</i> Rex Brown Resident Construction Manager (832) 316-7720 Robin Connolly Project Manager FFE II (512) 773-5752 Jeremy Head Sr. Project Manager (407) 383-7750 Tom Lund Regional Program Manager (214) 557-2270 Dewayne Hibbard Sr. Construction Inspector (214) 418-1880	3/15/2019	47,000,000
UT Permian Basin				102,100,000
	Construction	501-945 Engineering Building <i>Staffing:</i> Ken Frasier Resident Construction Manager (432) 967-0002	6/10/2019	55,100,000
	Construction	501-918 Kinesiology Building <i>Staffing:</i> Ken Frasier Resident Construction Manager (432) 967-0002	7/6/2020	37,000,000
	Definition	501-1229 Baseball / Softball Complex <i>Staffing : TBD</i>	12/7/2020	10,000,000
UT Rio Grande Valley				64,000,000
	Construction	903-943 Interdisciplinary Engineering and Academic Building <i>Staffing:</i> Deborah Carruth Project Manager FFE II (512) 921-2951 Laura Lara Sr. Project Manager (210) 643-6616	4/15/2019	35,300,000
	Construction	903-1159 School of Medicine Team Based Learning Center <i>Staffing:</i> Deborah Carruth Project Manager FFE II (512) 921-2951 Laura Lara Sr. Project Manager (210) 643-6616 Juan Camacho, Jr. Resident Construction Manager (956) 456-2215	3/30/2020	13,700,000
	Definition	903-1220 School of Medicine Institute of Neurosciences <i>Staffing:</i> Laura Lara Sr. Project Manager (210) 643-6616 Juan Camacho, Jr. Resident Construction Manager (956) 456-2215 Richard Shinsky Resident Construction Manager (956) 299-0506 Lori Tijerina Construction Inspector I (956) 328-4319	1/1/2021	15,000,000

ATTACHMENT 5.3

The University of Texas System Office of Capital Projects

Project & Staffing Resource List

Updated: 4/9/2019

	Phase	Project Name / Current OFPC Staffing	Substantial Completion	TPC
UT Tyler				59,463,755
	Construction	802-XX1 Patriot Plaza and Campus Wide Sidewalk Upgrades <i>Staffing:</i> Rex Brown Resident Construction Manager (832) 316-7720 Jeremy Head Sr. Project Manager (407) 383-7750 Tom Lund Regional Program Manager (214) 557-2270 Dewayne Hibbard Sr. Construction Inspector (214) 418-1880 Dayle Pettus Res. Const. Mgr & Project Mgr II (817) 422-6458 David Pinto Sr. Construction Inspector (469) 235-1403	9/1/2019	6,700,000
	Construction	802-947A College of Business Shell Space Buildout <i>Staffing:</i> Bill Amendola Sr. Project Manager (817) 307-6392 Jeremy Head Sr. Project Manager (407) 383-7750 Tom Lund Regional Program Manager (214) 557-2270 Dewayne Hibbard Sr. Construction Inspector (214) 418-1880 Dayle Pettus Res. Const. Mgr & Project Mgr II (817) 422-6458 David Pinto Sr. Construction Inspector (469) 235-1403	2/25/2020	2,763,755
	Pending	802-XX2 School of Nursing <i>Staffing : TBD</i>	TBD	50,000,000
TOTAL				829,113,755
Additional Staff Resources				
	Austin	Michael Brown Project Specialist II (512) 664-9028 DeVon Colvin Sr. Staff Mechanical Engineer (512) 892-4333 Michael Guzik Sr. Electrical Engineer (512) 657-7498 Emil Harsa Sr. Project Specialist (512) 579-5030 Lyn Kelly Sr. Accounting Associate (512) 322-3790 Larry Simmons Project Mgr. II & Commissioning (817) 422-8330 Debbie Townley Administrative Associate (512) 499-4600 Yolanda Vela Sr. Accounting Associate (512) 322-3790		
	North Texas	Emily Barron Sr. Program Analyst (214) 577-2339 Jim Ellis Resident Construction Manager (214) 952-9589 Pat Lee Administrative Associate (214) 549-7689		
	South Texas	Michael Coe Sr. Construction Inspector (210) 260-1811 Robert McNicol Res. Const. Mgr & Project Mgr II (210) 845-9639 John Paul Perez FPC Program Analyst (210) 975-4321		
	West Texas	Jennifer Manrique Administrative Assistant (915) 251-3240 Sara Parry Sr. Program Analyst (713) 557-5380		

**Denotes anticipated total project cost.*

ADDENDUM 02

**REQUEST FOR QUALIFICATIONS FOR
CAPITAL PROGRAM MANAGEMENT SERVICES**

**THE UNIVERSITY OF TEXAS SYSTEM ADMINISTRATION
RFQ No.: PM-2019**

DUE DATE: May 2, 2019, NLT 2:00 p.m.



Prepared By:
Richard DeLeon, AIA
Director of Project Management
The University of Texas System
Office of Capital Projects
210 W. 7th Street
Austin, TX 78701

REQUEST FOR QUALIFICATIONS FOR
CAPITAL PROGRAM MANAGEMENT SERVICES
The University of Texas System
RFQ No.: PM-2019

Addendum 02

The following information is issued to change, clarify, supplement or further explain the above referenced RFQ. This information shall supersede and take precedence over the information contained in the RFQ in the event of a conflict.

ITEM #001: Attached herein is the sign-in sheet from the Pre-Submittal Conference held on April 18, 2019.

ITEM #002: Attached herein are the slides from Powerpoint presentation from the Pre-Submittal Conference held on April 18, 2019.

ITEM #003: Attached herein are HUB documents, "How to Search the CMBL," related to the CMBL web site line in the PowerPoint presentation, slide #18, Section B-3: Notification of Subcontracting Opportunity, 2nd paragraph, sub-paragraph "a", which were inadvertently omitted from the HUB portion of the presentation.

ITEM #004: Responses to questions asked at the conference or in subsequent emails:

- a. Regarding the twelve identical copies of the qualifications to submit, does that number include the copy with original signatures? **Response:** Yes. There will be a total of twelve copies, each with original signatures.
- b. Regarding the audited financial statements requested in 3.2.2. Our firm's audited financial statements for three years will be many pages. Is it acceptable to submit a summary of our consolidated financial statements with our qualifications? **Response:** Yes. This is acceptable.
- c. You mentioned safety in the RFP as a requirement in the proposed project management firm. Can you explain in your new system will there be a safety manager, or will that be required to be managed? **Response:** Construction safety is very important to the UT System. The UT System will retain its safety professional. Construction safety training although not mandatory, will be a welcome attribute of your project staff.
- d. Will there be a plan review that your office will be doing in addition to the campuses? **Response:** Plan reviews typically are managed by the individual project manager. The Office of Capital Projects will have some resources to participate in future plan reviews. Campuses may also bring their own resources to plan reviews. If there are plan review resources that a Program Manager is able to bring as well, this will be viewed positively.
- e. How do we reconcile the count for resume pages competing with the required total page count in the RFQ? **Response:** We do need as much detail about the staff being presented as possible. However, in this phase of the selection, resume summaries may be used.



The University of Texas System
Office of Facilities Planning and Construction

The University of Texas System Administration
Capital Program Management Services
OFPC Project No. PM-2019

RFQ
Pre-Submittal Conference Sign-In Sheet
April 18, 2019

Name	Title	Company	Phone	E-Mail
DAVID MISKO	VICE PRES	PROTECH MGMT.	469.688.3800	DMISKO@PROTECHMGMT.COM
GARY VERLINDEN	CONST MANAGER	AECOM	(210) 585-0069	gary.verlinden@aecom.com
Jana Collins	Region Manager	SVC Leachin EHSO Lead	210-412-7675	jan.collins@fsgd.com
ALAN R BELL	ARCHITECT	AMAR-BELL AIA	512-560-5121	alanrbell@gmail.com
Kyle Vester	Regional Manager	O C M I, Inc.	469.431.0571	KVEATER@OCMI.COM
D SPYHARD	VICE PRESIDENT	ACROSS	713.994.4331	david.spyhard@across.com
RIGO SALINAS	VICE PRES.	AECOM	210-781-0024	RIGO.SALINAS@AECOM
Ray Roca	Vice President	NYS	817-691-1668	Ray.Roca@NYS.com
Sush Korpita	Business Development	Gessner Engineering	936-770-058	Sushkorpita@gessnerengineering.com
David D.	512-990-2221	
ROBERT PARANELL	PRESIDENT	ROBERT PARANELL, INC	512-784-3699	robroy.parnell@gmail.com
Stewart	Proj Exec	Hill Industries	512-656-2074	Stewart.Scott@hillintl.com
Robert Morse	Central Area Mgr	AFSI Const. Mgmt	713-301-9157	robert.morse@afsi.com
Damon DeFieze	Regional Mgr	Greenway USA	979-574-4167	ddefieze@greenwayusa.com
Ryan Rosborough	Vice Pres.	AG/CM, INC.	361-816-2468	rosborough@agcm.com
MICHAEL BRACK	PRESIDENT	DATUM	512-419-9490	michael@datumengineers.com



The University of Texas System
Office of Facilities Planning and Construction

The University of Texas System Administration
Capital Program Management Services
OFPC Project No. PM-2019

RFQ
Pre-Submittal Conference Sign-In Sheet
April 18, 2019

Name	Title	Company	Phone	E-Mail
Glenn Devonport	Business Dev	Syran One	512-426-9911	glenn@sg1.us
Laura Geubler	Mkt	JE Dunn	512-687-6153	laura.geubler@jedunn.com
Rick Johnson	VP	BRADDIS	214-437-8911	rjohnson@BRADDISUSA.com
Gilbert Gallegos	SVP	BRADDIS	512-297-7299	ggallegos@braddisassociates.com
Jessy Mihner	President	Front Line Consulting (HUB)	703-927-2584	jmhiner@frontlineconsultingllc.com
Bill Parks	PM	Front Line Consulting (HUB)	764-763-0528	wpark@frontlineconsultingllc.com
Daina Pitzemberger	PM	Transwestern FM Services	281-840-9129	daina.pitzemberger@transwestern.com
Joyce Bradrick	Principal	JACOBS	512-963-6688	joyce.bradrick@jacobs.com
Kyle Parker	BL	JACOBS	214-727-1923	kyle.parker@jacobs.com
Luis Delgado	VP	AECOM	972-809-6985	luis.delgado@aecom.com
DON ALEXANDER	PRINCIPAL	JACOBS	512-732-7610	don.alexander@jacobs.com
Lissi Riedel	Business Development	Mckissack & McKissack SBE	512-815-8232	lissi.riedel@mckinc.com
ANDY SIEFKER	CONSTRUCTION MANAGER	NVS	512-497-3828	andy.siefker@nvs.com
Jose Hidalgo	Construction Manager	VANIT C.M	512-579-9267	jose.hidalgo@vanit.com
Robert Farcoulson	SVP	Hill International	409-242-4705	robert.farcoulson@hillintl.com
Jason M Daniel	SR QA Manager	Hill International	832-434-5028	jason.m.daniel@hillintl.com
MERRILL STANLEY	VP	PROJECT CONTROL	210-545-0008	mstanley@projectcontrol.com
RICHARD M'NARY	COO/PRESIDENT	PROJECT CONTROL	210-545-0008	dmcnary@projectcontrol.com



The University of Texas System
Request for Qualifications for
Capital Program Management Services

April 18, 2019

The University of Texas System
Capital Program Management Services
RFQ No. PM-2019

Agenda:

- Welcome & Introductions
- General Statement
- Attachments
- RFQ Submittal Requirements
- HUB Subcontracting Plan
- RFQ Submittal Due Date
- Questions



The University of Texas System
Capital Program Management Services
RFQ No. PM-2019

Staff Introductions:

- Name
- Organization
- Title and brief role
- Where located



The University of Texas System
Capital Program Management Services
RFQ No. PM-2019

General Statement:

- 3rd party review of various System Administration offices begun in 2018.
- In late 2018, the Chancellor endorsed the study and presented System reorganization options to the BOR.
- The approved reorganization includes delegation for management of capital projects to 5 additional campuses:
 - UT Arlington
 - UTSA
 - UTHSC San Antonio
 - UTHSC Houston
 - UT Dallas

The University of Texas System
Capital Program Management Services
RFQ No. PM-2019

General Statement:

- With the reorganization, OFPC is transitioning into a new department of 12 staff with a modified role.
- Staff reductions at OFPC are staggered over 12 months to ensure projects are effectively transferred to delegated campuses.
- The new Office of Capital Projects will have monitoring responsibilities for the delegated campuses.
- Office of Capital Projects is engaging a 3rd party Program Manager to manage work at 6 campuses.

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

General Statement:

- The successful Program Manager will negotiate services for capital projects under the management and oversight from the Office of Capital Projects.
- Campuses to be associated with the 3rd party Program Manager:
 - The University of Texas at Dallas
 - The University of Texas at El Paso
 - The University of Texas Permian Basin
 - The University of Texas Rio Grande valley
 - The University of Texas at Tyler
 - The University of Texas Health Science Center at Tyler
 - UT Austin Dell Med Austin State Hospital (1 project)

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

General Statement:

- Seeking individual project management as well as comprehensive program management.
- 2.2.1.1 OCP anticipates negotiating for the full range of services required for project delivery including schedule monitoring, administration, HUB, auditing, etc.
- 2.2.1.2 Anticipate complex higher education academic and healthcare facilities from athletics, to infrastructure and research.
- 2.2.1.4 Anticipate staff being needed for all phases from inception and feasibility, through warranty.

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

General Statement:

- Seeking expertise in specific job roles, as well as project delivery leadership.
- Anticipate adhering to established project milestones and UT System process flows, augmented by Program Manager's specific project delivery tools.
- Program Manager will be responsible for overall project management due diligence (codes, approvals, budget, decisions, schedule, etc).
- Support HUB program and other UT System initiatives.
- Staff locations and resources to be negotiated.

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

General Statement:

- Unlike previous PM solicitations, this is not a staff augmentation.
- After negotiation of the Master Agreement, individual project Work Orders will be negotiated, as needed.
- 2.2.3: Summaries of key job titles. These are expanded in Attachment 5.7.
- 2.2.4: Desire to mitigate impacts to projects from transition.

The University of Texas System
Capital Program Management Services
RFQ No. PM-2019

Questions



The University of Texas System
Capital Program Management Services
RFQ No. PM-2019

Attachments:

- 5.2: Exhibit H, Policy on HUB
- 5.3: Project and Staffing List
- 5.4: UT System Project Phases
- 5.5: Risk Mitigation and Monitoring Checklist
- 5.6: Gifts and Honoraria Policy
- 5.7: OCP Job Information Forms
- 5.8: Sample Status Reports
- 5.9: OPUS Executive Summary Reports

The University of Texas System
Capital Program Management Services
RFQ No. PM-2019

Questions



The University of Texas System
Capital Program Management Services
RFQ No. PM-2019

RFQ Submittal Requirements

Owner receives RFQ's – Step 1	May 2, 2019
Owner interviews Shortlist - Step 2	June 18, 2019
Owner executes Agreement	June, 2019
Negotiation of individual Work Orders	TBD



The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

RFQ Submittal Requirements:

2 Step process:

- **Step 1** –Submission of Criteria 1 through 10 in Section 3 of the RFQ, HUB Plan and Execution of Offer. Up to 5 of the “most qualified” will be short listed to proceed to Step 2. Maximum of 50 printed pages.
- **Step 2** – Interviews with the top ranked qualified respondents.
- Each page with printed information on it counts toward the maximum page limitation. The cover, table of contents, divider sheets, HUB Plan, Execution of Offer and SF254/330 do not count as printed pages.

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

RFQ Submittal Requirements:

• All documents submitted shall be executed and submitted with “original” signatures on “Respondents Statement of Qualifications and Ability to Undertake the Project”, the “Execution to Offer”, and “HUB Subcontracting Plan”(submitted under separate cover).

• Step 1, Audited Financial Reports (preferred), financial statements prepared by CPA (on CPA's letterhead), or Dun + Bradstreet reports are acceptable for this submission. These can be submitted under separate cover as described in Section 3.2 of the RFQ.

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

RFQ Submittal:

- RFQ can be downloaded w/ all attachments at:
<http://www.utsystem.edu/fpc>
 - Click on “Business Opportunities”
 - Then “Current Design Professional and Contractor Procurement Opportunities”, or
 - [https://utsystem.edu/fpc/managment current projects.html](https://utsystem.edu/fpc/managment_current_projects.html)
- Please sign-in on roster being circulated
- Addendum No. 2 will be posted to the link

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

HUB Subcontracting Plan
 HUB Goal for this project: 26%

HUB Subcontracting Plan including good faith effort documentation is due Thursday, May 2, 2019 at 2:00 p.m. Submit one electronic pdf copy via e-mail to utconsthsp@utsystem.edu. See Section 1.8.3 and 1.16.4 for HUB submission instructions.

The last day to date and send bid invitations to subcontractors is Monday, April 22, 2019.

Good Faith Effort – Refer to Section B-3 of the HSP.

Find HUB firms by searching the Centralized Master Bidders List (CMBL) <https://mycpa.cpa.state.tx.us/tpasscmlsearch/tpasscmlsearch.do>

Minority Organizations can be found at: <https://comptroller.texas.gov/purchasing/vendor/hub/resources.php>

Sub-tier subcontracting participation counts

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

SECTION B-3. NOTIFICATION OF SUBCONTRACTING OPPORTUNITY

When preparing this section you MUST comply with items a, b, c, and d, thereby demonstrating your Good Faith Effort of having notified Texas certified HUBs and trade organizations or development centers about the subcontracting opportunity you listed in SECTION B-1. Your notice should include the scope of work, information regarding the location to view plans and specifications, branding and insurance requirements, required qualifications, and identify a certified entity. When sending notice of your subcontracting opportunity, you are encouraged to use the attached HUB Subcontracting Opportunity Notice form, which is also available online at: <https://www.comptroller.texas.gov/purchasing/vendor/hub/hsp.html>

Include supporting documentation (i.e., certified letter, fax, e-mail, demonstrating evidence of your good faith effort to notify the Texas certified HUBs and trade organizations or development centers. Also, to include that a working day is considered a normal business day of a state agency and including weekends, federal or state holidays, or each the agency is declared closed by its executive order. The initial day the subcontracting opportunity notice is sent provided to the HUBs and to the trade organizations or development centers is considered to be "day one" and does not count as one of the seven (7) working days.

4. Provide written notification of the subcontracting opportunity you listed in SECTION B-1, to three (3) or more Texas certified HUBs. Unless the contracting agency specified a different time period, you must allow the HUBs at least seven (7) working days to respond to the notice prior to your submitting your bid response to the contracting agency. When sending fax, email, or certified mail, ensure that you use the State of Texas' Certified Bidder Bidder List (CMBL) - Historically Underutilized Business (HUB) Directory Search located at <https://mycpa.cpa.state.tx.us/tpasscmlsearch/tpasscmlsearch.do>. HUB status code "N" specifies that the company is a Texas certified HUB.

5. List the **three (3)** Texas certified HUBs you notified regarding the subcontracting opportunity you listed in SECTION B-1, include the company's Texas Vendor Identification (VID) Number, the date you sent notice to that company, and indicate whether it was responsive or non-responsive to your subcontracting opportunity notice.

Company Name	Texas VID	Date Notice Sent	Did the HUB Respond?
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No
			<input type="checkbox"/> Yes <input type="checkbox"/> No

6. Provide written notification of the subcontracting opportunity you listed in SECTION B-1 to **ten (10)** or more trade organizations or development centers in Table B-3 to assist in identifying potential HUBs by disseminating the subcontracting opportunity to their member participants. Unless the contracting agency specified a different time period, you must provide your subcontracting opportunity notice to trade organizations or development centers at least seven (7) working days prior to submitting your bid response to the contracting agency. A list of trade organizations and development centers that have expressed an interest in receiving notices of subcontracting opportunities is available on the CMBL HUB Program's webpage at <http://www.comptroller.texas.gov/purchasing/vendor/hub/resources.php>.

7. List **ten (10)** trade organizations or development centers you notified regarding the subcontracting opportunity you listed in SECTION B-1, include the date when you sent notice to each and indicate if completed or pending your notice.

Trade Organizations or Development Centers	Date Notice Sent	Was the Notice Accepted?
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

HUB Subcontracting Plan

Stephanie Park – Sr. HUB Coordinator
spark@utsystem.edu
 UT System Office of HUB Programs
 972-883-5377

<https://www.utsystem.edu/offices/historically-underutilized-business/hub-pro>

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

RFQ Submittal:
 Submit all RFQ Responses (12 copies) to:

Richard DeLeon, AIA
 Director of Program Management
 The University of Texas System
 Office of Capital Projects
 210 W. 7th Street
 Austin, Texas 78701

Submission Date/Deadline: May 2, 2019 @ 2:00pm local time

The University of Texas System
Capital Program Management Services
 RFQ No. PM-2019

Questions:

Please direct any inquiries to (Ref. Sec. 1.9):

Richard DeLeon, AIA
Director of Program Management
The University of Texas System
Office of Capital Projects
8403 Floyd Curl Dr., Bldg. 205, Mail Code 7955
San Antonio, Texas 78229
Phone: 210.567.8727
e-mail: rdeleon@utsystem.edu

The University of Texas System

Capital Program Management Services

RFQ No. PM-2019

Questions



The University of Texas System

Capital Program Management Services

RFQ No. PM-2019

UT System Guide for Finding HUB Vendors on the CMBL

(Centralized Master Bidders List)

[Office of HUB Programs](#)



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Please visit

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- [Search HUB Vendors by Commodity/ Service Description](#)
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- [NIGP Class and Item Codes for Construction Services](#)
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- [NIGP Class and Item Codes for General Commodities/ Services](#)
(Page 12)
- [Office of HUB Programs Contact Information](#)
(Page 13)

****Click on the links above to go directly to the desired section****



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UT System Departmental Guide for CMBL rev.07.09.18

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Guide for Searching CMBL by NIGP Class & Item/ Description

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Search the CMBL for Historically Underutilized Businesses (HUBs) by Commodity/Service Description

Click on this link to open the CMBL Home Page: <https://mycpa.cpa.state.tx.us/tpasscmblsearch/>

~then~

Go to the next page (pg. 4) of this guide for step-by-step instructions on how to do a search.



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Tip: If you have dual monitors, it is helpful to have this guide open on one and your default browser on the other.

UT System Departmental Guide for CMBL rev.07.09.18

3

Step 1.

SEARCH FOR
 CMBL Only HUBs Only HUBs On CMBL All Vendors

****Note: If you are looking for all subcontractors or vendors, select 'All Vendors'**

Step 2.

1) Expand the 'MULTIPLE VENDOR SEARCH' Option, then

2) Click on 'NIGP Class Code' link.
*Note: the page will open in a new tab in your browser

~Go to next page for Step 3~



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UT System Departmental Guide for CMBL rev.07.09.18

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Guide for Searching CMBL by NIGP Class & Item/Description

Step 3.

State of Texas NIGP Commodity Book Numeric Index
(Revised January, 2016)

NOTE: The official NIGP Commodity Book is copyrighted material to be used for reference purposes only and may not be reproduced without a license from Periscope Holdings, Inc.

[Alpha Index](#) for keyword search

Click on a class code to see the items for that class

Class Code	Description
005	ABRASIVES
010	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES
015	ADDRESSING, COPYING, MIMEOGRAPH, AND DUPLICATING MACHINE SUPPLIES: CHEMICALS, INKS, PAPER, ETC.
019	AGRICULTURAL CROPS AND GRAINS, INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES
020	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
022	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
025	AIR COMPRESSORS AND ACCESSORIES
031	AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES
035	AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES
037	AMUSEMENT, DECORATIONS, ENTERTAINMENT, GIFTS, TOYS, ETC.
040	ANIMALS, BIRDS, MARINE LIFE, INSECTS AND REPTILES, INCLUDING ACCESSORY ITEMS

Step 4.

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State of Texas Commodity Code Search
(Revised January, 2016)

NOTE: Search results represent NIGP's search-friendly keyword data set and not official code descriptions. The official NIGP Commodity Book is copyrighted material to be used for reference purposes only and may not be reproduced without a license from Periscope Holdings, Inc.

[Go To Numeric Index](#)

Enter a word or words to match. Matches will contain all words entered.

Search keywords:

OR

Search by Class: (3 digits required)

~Go to next page for Step 5~



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Step 5.

State of Texas Commodity Code Search
(Revised January, 2016)

NOTE: Search results represent NIGP's search-friendly keyword data set and not official code descriptions. The official NIGP Commodity Book is copyrighted material to be used for reference purposes only and may not be reproduced without a license from Periscope Holdings, Inc.

[Go To Numeric Index](#)

Enter a word or words to match. Matches will

Search keywords:

OR

Search by Class: (3 digits required)

Step 6.

[Return to Table of Contents](#)

[Go To Numeric Index](#)

Enter a word or words to match. Matches will contain all words entered.

Search keywords:

OR

Search by Class: (3 digits required)

Search Results

6 results matching "promotional" sorted by Keyword

Click on a column title to sort search results.

Class:	Keyword Match
952-24	CULTURAL ADMINISTRATION AND PROMOTIONAL SERVICES
037-52	PROMOTIONAL AND SPECIALTY PRODUCTS
715-30	PROMOTIONAL MATERIALS (PUBLICATIONS)
952-24	PROMOTIONAL SERVICES, CULTURAL
037-78	PROMOTIONAL SOUVENIRS
961-53	SALES PROMOTIONAL SERVICES

1) Find the Class and Item(s)* that best suit what you are looking for. You will have to write these numbers down, or remember them. Then,

2) Click on the Search For Vendors tab at the top of your browser and you will be returned to the CMBL home page

Step 6a.

Search For Vendors

State of Texas Commodity Code Search

https://cmblreg.epa.state.tx.us

*Class Code: first three numbers
Item Code: last two numbers

~Go to next page for Step 7~



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Guide for Searching CMBL by NIGP Class & Item/ Description

Step 7.

TIP: Enter only the Class Code for a more comprehensive list of vendors

Enter the Class Code(s) here

Enter the Item Code(s) here

Highway District(s)

Note: Avoid using "Highway District" as a search criteria. The search result is not a comprehensive list of HUBS doing business in those counties.

Step 8.

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After entering the codes, expand "SELECT FIELDS FOR OUTPUT" by clicking on the black arrowhead.

~Go to next page for Step 9~



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Step 9.

Remove all fields except for the ones showing below by clicking the "x" next to the description

Step 10.

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Add Business Description by choosing it from the dropdown box below the fields

~Go to next page for Step 11~



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Guide for Searching CMBL by NIGP Class & Item/ Description

Step 11.

Step 12.

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The next page will show you the results of your search



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Results of Searching HUBs by NIGP Class & Item/ Description.

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Search For Vendors

Search found 28 vendors, 23 are HUBs. Includes 0 inactive Vendors
Search Conditions: SearchType=CMBL Only,Section1 Class Code=037,Section2 Item(s)=78,Location District(s)=(14)

Company Name	Contact Person	Mailing Address	City	Zip	Email	Phone	Business Description	HUB Eligibility*	HUB Gender**	CMBL Status	HUB Status
ARETE SERVICES, INC. DBA ARETE	BB Davis	ARETE PROMOTIONS 8600 CAMERON LOOP	AUSTIN	78745-7916	bill@aretepromotions.com	512-799-5323	Printing and Promotional Products	WO	F	Active	A-Active
ROOSTER CAIN	Loretta Sanchez	1201A W 39TH 1/2 ST	AUSTIN	78756-3903	lorettad@roostercain.com	512-797-4935	I provide promotional products like t-shirts, caps,pens,caps,jackets,jeseys,signs,banners,business cards,uniforms,embroidery,screen printing	HI	F	Active	A-Active
SHERRY MATTHEWS, INC.	Wardaleen Belvin	200 S CONGRESS AVE	AUSTIN	78704-1219	wbelvin@sherrymatthews.com		I specialize in dis placement, public TV, radio, net marketing, research, printing, etc	WO	F	Active	A-Active
ARMADILLO ADVERTISING	Carla Schaefer,Owner/Cell	3006 BEE CAVES RD SUITE A-211	AUSTIN	78746-5588	cschaefer@armadilloadvertising.com	512-542-9095	Distributor of promotional products and specialty advertising. We offer wearables (T-shirts, caps, polos, etc.), hoodies, cups, key Business also does Freshco	WO	F	Active	A-Active
AUSTINATHOUS ADVERTISING	OWNER/DEBI WITT JONES	10816 CROWN COLONY DR SUITE 208	AUSTIN	78747-1056	tatous@aol.com	512-447-7666	Promotional products, items that can be printed with a logo or event for employee incentives, trade shows, safety programs or product enhancement.	WO	F	Active	A-Active
IMPRINTED PRODUCTS OF AUSTIN	Owner/Anna M. Breed	5813 LNARIA LN	AUSTIN	78759-6269	imprintedproducts@aatt.net	512-345-7162	Distributor of Promotional Gift Products, custom imprinted, Ad-Specialty	WO	F	Active	A-Active
WALTER ALLAN STUDIOS	WALTER ALLAN, OWNER	5903 MEDIAN RD	AUSTIN	78734-1135	info@walterallanstudio.com	512-206-3112	Promotional Products Advertising and Awards	WO	F	Active	Inactive(0)
ANT FARM SPECIALTIES LLC	Pres./Julie K. Wallace	300 BRISBARDWOOD TRL	AUSTIN	78746-5411	JULIE@ANTFARM.SPECIALTY.COM	512-328-6130	PROMOTIONAL ADVERTISING	WO	F	Active	A-Active
BEHIVE SPECIALTY	President/JOCKI	8701 WALL ST	AUSTIN	78754-4402	wicki@ancesthen.com	512-812-7840	Promotional products, packaging and fulfillment services	WO	F	Active	A-Active

*Eligibility/ Ethnic codes: AS - Asian
AI - Native American
BL - Black
HI - Hispanic
SDV - Service Disabled Veteran
WO - Woman-owned

**Gender codes: F - Female
M - Male



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Guide for Searching CMBL by NIGP Class & Item/Description

Commonly Used NIGP Class and Item Codes for *Construction Services*

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031 -- AC/H & Ventilating Equipment, Parts, & Access
 135-05 -- Alabaster, Gypsum, etc.
 150 -- Builder's Supplies (Window Coverings)
 150-25, 26, 27 -- Doors Frames & Hardware
 150-49 -- Millwork
 150-55, 77, 89 -- Overhead Doors
 155-20 -- Canopies
 165 -- Commercial Kitchen Equipment
 295-48, 70 -- Elevator/Equipment Lift
 330 -- Fencing
 340-08 -- Cabinets & Covers (For Fire Extinguishers, Fire Hose & Racks, Valves, etc.)
 340-16 -- Fire Alarm Systems, Power Sirens, & Controls
 401-6, 18, 30; 420-11, 415-39, 40 -- Lab Casework
 420-04 -- Auditorium, Stadium, Team Seating Furniture, & Portable Bleachers
 440 -- Glass & Glazing
 450 -- Hardware
 450-92 -- Wire & Cable Mechanical
 493-96 -- Water Quality Basins
 560-39 -- Cranes (Except Automotive, Road, & Bridge Building)
 570 -- Specialties
 670 -- Plumbing Equip, Fixtures & Supplies
 680-02 -- Access Control Systems & Security Systems
 725-54 -- Project Site Security
 770-64 -- Roofing, Concrete Tile [See 135-74 for Clay Roofing Tile]

801 -- Project Signage (Signs, Materials, Equipment, & Related Supplies)
 803 -- Sound Reinforcement Systems
 805-17 -- Athletic Field Markers, Goal Posts, Bases, Goals, etc. (Incl. Ath. Field Striping Machines)
 805-63 -- Scoreboards
 805-73 -- Stadium Lighting Equipment and Light Poles [See Class 285 for Lamps]
 805-81 -- Track Equipment (Including Pedometers, Pole Vault, High Jump Equipment, etc.)
 838-34 -- Project Site Security (Communication Security System)
 870 -- Window Coverings (Venetian Blinds, Awnings, & Shades)
 909-37 -- Windows/Storefront/Curtain-wall
 909-34 -- Conveying Systems (Elevators, Lifts etc.)
 910-03, 09, 25, 39 -- Final Clean
 910-17 -- HVAC, Lighting, Utilities, Install/Maintain/Repair Svcs
 910-22 -- Sprayed Fireproofing
 910-36 -- AC-HV Maintenance & Repair Services
 910-51 -- Turnkey Concrete
 910-54 -- Painting, Maintenance & Repair Services (Including Caulking)
 910-60 -- Mechanical
 910-78 -- Waterproofing & Sealants
 912-20 -- Construction Fire Protection (Fire Escapes)
 912-40 -- Abatement & Demolition
 912-44 -- Excavation/Grading/Erosion Control/Tree Protection
 913-94, 95, 96 -- Paving
 914-27 -- Carpentry
 914-38 -- Electrical
 914-44 -- Flooring & Flooring Specialties
 914-50 -- HVAC- Heating, Ventilating, & Air Conditioning

914-55- Masonry (Concrete & Structural Masonry)
 914-61- Painting & Wallpapering
 914-64- Drywall-Acoustical Ceilings
 914-68 - Plumbing
 914-73 - Roofing & Siding (required window washing access.)
 914-79- Structural Steel/Secondary Steel/Misc. Metals
 914-80 Stucco (Masonry/Stone/Stucco/Plaster)
 914-83- Tile & Marble Work, All Types
 914-88 - Wood (Millwork/Casework/ Architectural Wood Work)
 915-97 - Telecomm/Data and AV/Security (Wiring Services Data/Voice)
 918-73 - Landscaping/Irrigation (Consulting)
 918-93 - Project Site Security (Security/Safety Consulting)
 929-33 - Cranes- Backhoe, Dragline, Clamshell etc. Maintenance & Repair
 931-30 Cafeteria and Kitchen Equipment, Commercial, Maintenance and Repair
 934-64 -Plumbing Equip. & Fixtures, Maintenance & Repairs
 936-33- Fire Protection Equipment & Systems Including Fire Hydrants, Fire Sprinkler Systems, Smoke Detectors, Jaws of Life, Fire Protection Material Treatment, etc. Maintenance and Repair
 958-95- Site Utilities
 958-96 - Waste Management Services
 962-37 Flagpole
 967-02 - HVAC Equipment & Manufacturing Services
 967-30 Plastering
 975-26 - Cranes & Buckets Rental or Lease
 988-52-Landscaping (Including Design, Fertilizing, Planting etc.) But not Grounds Maintenance or Tree Trimming Services
 990-11 - Safety Training & Awareness Services



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Commonly Used NIGP Class and Item Codes for *General Commodities/Services*

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946 - Accounting Services
 918-04 - Accting Services (Consulting)
 915 - Advertising Services
 906 - Architectural Design Services
 925 - Engineering Services
 962-46, 939-06, 915-09 - A/V Services
 918-04 - Auditing Services
 915-20 - Call Center Services
 961-15 - Catering
 918 - Consulting Services (all types)

910-39 - Custodial Services
 545-29 - Custodial Supplies
 962-35 - Custom Picture Framing
 962-60 - Event Planning/Services
 915-96 - Graphic/Web/MM Design
 962-39 - Hauling Services
 545-29 - Industrial Supplies
 920-66 - IT Services/ Support
 925-86 - Land Surveying
 988-52 - Landscaping Services

924 - Learning/ Educational Training
 961-50, 918-24 - Legal Services
 918-76, 961-53 - Marketing Services
 910-59 - Pest Control
 037-52, 037-78, 715-30 - Promotional Products
 946-15, 918-89, 958-53, 958-83, 971-63 - Real Estate
 918-93, 920-37, 990 - Security Services
 680-02 - Security Systems
 838, 939-72, 915-79 - Telecom./Data Services
 962-69 - Temp Services
 915-09, 915-82 - Video Production



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