



Department of
Purchasing

Mark A. Booker
Executive Director

May 31, 2023

ADDENDUM #1, CSP# 399-23, Job Order Contract (JOC)

This addendum forms a part of the solicitation documents, modifies the original document as indicated in the Addendum 01 provided below and is hereby made part of any pursuant award. Acknowledge receipt of this Addendum in EXHIBIT B, CSP 399-23 JOB ORDER CONTRACTS (JOC) PROPOSAL FORM, in the bid package submittal documents. Failure to submit the acknowledgement of addenda will be used as an evaluated factor.

*AS A REMINDER, THE SUBMITTAL DATE FOR THIS CSP REMAINS TUESDAY, JUNE 6, 2023 no later than 1:00 PM at the Garland ISD Purchasing Construction Bond Department, Marvin Padgett Auxiliary Services Center Building, 701 N. First Street, Garland, Texas 75040.

1. ADDENDUM 1, Attachment 1: QUESTIONS/CLARIFICATIONS AND ANSWERS, 5 pages.
2. ADDENDUM 1: CHANGES TO CSP 399-23,
 - a. ADD TO “2.4 Unit Cost Guides, 8. RS Means Facilities Construction Cost Data book.”
 - b. REMOVE IN ITS ENTIRETY, “1.4.4. TABLE: EVALUATION CRITERIA STEP 1:” and REPLACE with “ADDENDUM 1, ATTACHMENT 3, 1.4.4. TABLE: EVALUATION CRITERIA STEP 1:”.
 - c. CHANGE paragraph F., page 64 of 101 from “two (2) separate flash drives...” to “one (1) flash drive...”
3. ADDENDUM 1, Attachment 2: “1.4.4. TABLE: EVALUATION CRITERIA STEP 1:”, 1 page.

The full document under Addendum 1 is attached and available on the Google drive at:
https://drive.google.com/drive/folders/1PZUpEhCRpM6EJwteRQhftglgczrx_fhu

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ADDENDUM 1
ATTACHMENT 1
QUESTIONS/CLARIFICATIONS AND ANSWERS

1. Is this going to be Garland ISD's first JOC contract? if not, how much was spent on the current contract and the number or projects performed from inception to date?

ANSWER: Yes, there is no current contract in place for JOC.

2. If this is not GISD's first JOC contract, who are the incumbents and what are their coefficients?

ANSWER: This is the first time Garland ISD is soliciting for JOC contracts.

3. Technical Proposal Form, Item 3.a Execution says, "Please note that Garland ISD requires oversight by a named superintendent while Work is in progress, contingent upon the continued employment of those personnel by the Contractor. Contractor's staffing approach and organization must reflect this requirement. Contractor may not make any changes to these personnel assignments without the prior approval of the Program Manager and the Owner during the execution of an AOW." Please clarify if this requirement means the school district expects a dedicated superintendent to each work order in progress that does nothing but attending to this one active work order regardless of the size, complexity or dollar value of the work order. For example: a \$25,000 paving or painting project will require dedicating a superintendent.

ANSWER: Garland ISD is requesting the response to include the contractor's approach to how AOWs are managed during performance of the work. The preference is to have one person for oversight and to answer to the District's project manager. One superintendent may have multiple smaller projects or there may be one project with a dedicated superintendent, but once assigned, those designated would remain in their role through completion of the AOW.

4. Item 2.4 lists several RS Means unit price books, but it does not include RS Means Facilities Construction Cost Data book. Will Irving GISD accept RS Means Facilities Construction Cost Data Book as an acceptable unit price book along with the other listed RS Means books?

ANSWER: This is not Irving. Garland ISD will accept the RS Means reference that provides the most cost-efficient quote. See Addendum 1, "ADD TO "2.4 Unit Cost Guides, 8. RS Means Facilities Construction Cost Data book."

5. Technical Proposal Form, Table 8, Proposed Project Staff asks offerors to list the proposed staff utilizing a form for project manager and superintendents. There are two superintendent spots and each one asks for the name of the school.

ANSWER: Enter, "GISD Middle School" for the name of the school with address 701 N. First Street; Garland, TX 75040. This is for the sample only.

6. Does this mean GISD intends to have work at only two schools and bidders must dedicate a superintendent to each school?

ANSWER: No. There are future projects anticipated for Garland ISD. Actual scopes of work for Assignment of Work (AOW) are not identified at this time. When a quote is requested, the information and documentation will be provided for the specific scope/project. Personnel/titles and the quote will be reviewed by GISD personnel in charge of the project.

7. Which school name do we use?

ANSWER: See answer to question 5.

8. Will GISD be holding a pre-bid conference call, virtual meeting or in-person pre-bid meeting?

ANSWER: No, not for this CSP. As projects come up, there may be conferences to go over details with the awarded contractors when requesting quotes.

9. What amount do you want us to get the Proposal Bond for? The total \$10,000,000 for the contract or \$2,000,000 for the annual contract amount.

ADDENDUM 1
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QUESTIONS/CLARIFICATIONS AND ANSWERS

ANSWER: Per page 5 of 101, paragraph 1.1.5, a proposal bond of 5% of the annual amount of \$2,000,000.

10. ENVIRONMENTAL Initiatives: Garland ISD is committed to reducing waste and promoting energy conservation. Toward that end, Proposers are encouraged to provide their company's environmental policy and green initiative. Do you want this placed in an appendix?

ANSWER: You may submit in hard copy and include in the Index. Include in the electronic file on the flash drive as a separate tab.

11. Per "PART B: TECHNICAL PROPOSAL Proposer will provide three (3) references with most updated contact information. (References shall be from Owner and/or Architect who directly oversaw the JOC Project(s) listed under the past or recent experience category below) Minimum two (2) owners. The District reserves the right to evaluate references not included in the submitted proposal. Answer the questions for each relevant project, with emphasis on school, educational, and/or renovation experience, that your organization has in-progress or completed."

Can you please clarify, do you want three references per project?

ANSWER: No. Information is needed to contact and receive replies from references from three (3) projects. Typically, the reference is the owner or project manager for the owner.

12. Reference "2b. Safety Submit OSHA inspection logs for the last three years, a loss analysis from the offeror's insurance carrier, and a loss history covering all lines of insurance coverage carried by the offeror for past 3 years, Table 4. The safety matrix (table 4) has columns for four years plus the current year for a total of five years." Are you requesting OSHA logs from 2022, 2021 and 2020 only? Logs for 2023 are unavailable.

ANSWER: Garland ISD is requesting information for the past 3 years in which the information is available. Years 2020 through 2022 is fine.

13. Packaging Format Questions,

a) the CSP's Submittal Procedures section (1.1.3) and Overall Packaging Proposal list that our proposal requires one (1) hard copy original and one (1) flash drive. On pg. 7 of the Technical Proposal, two (2) separate flash drives are stated as required. Please clarify.

ANSWER: See ADDENDUM 1, Item # 2c.

b) the packaging checklist states that the documents should be completely unbound, while the Safety Manual may be placed in a 3-ring binder.

(1) Are we to provide our proposal only as loose paper, or is it acceptable to place it in a folder?

ANSWER: The proposal and safety manual may be in a 3-ring binder or clipped. The main point is not to "bind" it to where the pages may not be extracted easily.

(2) Is the rest of the proposal package separate from the Safety Manual?

ANSWER: It is preferred to have the Safety Manual separate from the other submittals as a hard copy and a file.

14. Sample AOW Questions & Concerns,

a) To confirm, the items provided in Exhibit B Attachment 1A/1B are all the designated line items for this sample AOW?

ANSWER: The sample AOW scope in Exhibit B, 1A is to be used, with the pricing submitted in Exhibit B, to complete Exhibit B, 1B excel document.

b) Section 3a discusses staff organization along with the sample AOW project. Do we provide a separate org chart and resumes for the AOW?

ADDENDUM 1
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QUESTIONS/CLARIFICATIONS AND ANSWERS

ANSWER: *The technical proposal for this CSP is to submit the organizational chart of your company. The reference to the sample AOW project provides an opportunity to submit a “sample” of how you would respond to a request for quote using the scope of the sample AOW.*

c) Section 3b of the Technical Proposal requires a detailed plan that shows a thorough understanding of the project scope and phasing plan provided. Exhibit B does not provide information about the District's specific phasing requirements, overall project scope (besides line items) or location of the sample AOW.

ANSWER: *See response to question 5. Provide your firm's plan/process for phasing. The sample AOW is just an example of the scope in Exhibit B, Attachment 1A, Middle School HVAC replacement. This with the line items in Attachment 1B should provide sufficient information to submit a time line/phasing plan during an active campus.*

d) Section G of the Technical Proposal lists multiple major items for the sample, such as a site-specific construction plan with specific routes and nearby medical facilities. However, the provided information only includes line items and the title: Middle School HVAC Replacement. No drawings or related items appear to be accessible.

ANSWER: *This is for HVAC replacement, see response to questions 5 and 14c. There are no drawings or specifications other than the information in Exhibit B and Ex B, Attachments 1A and 1B.*

e) The Sample AOW is a crucial part of the evaluation, but the current documents lack necessary information for putting together a detailed and specific execution plan/schedule. Is it possible to request an extension to the deadline?

ANSWER: *The proposal due date and time remains June 6, 2023 at 1:00 p.m. The sample AOW is part of the evaluation and mainly to be used for the pricing evaluation. The evaluation of the technical proposal is focused on how your company responds to requests for quotes, past experience completing JOC work, and the other criteria listed.*

15. Overall Proposal Packaging Checklist Questions

a) Exhibit D Prevailing Wage Rates (Section 00 43 43) appears to be an informational document. Do we return this as-is in our package?

ANSWER: *Yes. Documents to be completed need to be returned, as noted. Those documents that are information may be returned as listed. This is the preferred format to avoid missing documents in submittals.*

b) Schedule 8 CH and CV Local Delegation of Authority is the same as the above. Do we return this as-is in our package?

ANSWER: *Yes.*

c) Schedule 9 HUB Information and Sample Form is also listed as part of our returned package. Do we submit this form with no changes?

ANSWER: *Yes.*

d) Schedule 11 Certificate of Interested Parties is also an informational sheet. Same question as the previous three (3).

ANSWER: *Yes, sample document only. You will be notified if the filing is needed.*

e) Exhibit E AIA A305 Contractor's Qualification Statement is listed on a single blank page.

(1) Are we to provide and complete a separate AIA A305 for our package?

ANSWER: *Yes, provide a completed AIA A305 using the latest version available.*

(2) If so, is a certain year preferred or required?

ANSWER: *The latest version available.*

ADDENDUM 1
ATTACHMENT 1
QUESTIONS/CLARIFICATIONS AND ANSWERS

f) The Exhibit B Attachments 1A and 1B are shown under the Proposal Form, but many of the required items for the sample AOW are listed in the Technical Proposal section. Please clarify where the sample AOW documents are meant to be placed in our package.

ANSWER: *The excel sheet with the pricing will be in the order of the evaluation criteria. You can submit the sample AOW documents as a separate section or in the order of the technical evaluation items, as long as the index reflects where to find the information. The easier for the panel to find the information, the more efficient the evaluation.*

g) Schedule 9 HUB Information & Sample Form Questions, the document states that no HUB participation goal is in place, but also that the sample form shall be submitted within four (4) calendar days after proposals are due. Please confirm or clarify:

(1) Do we need to contact subcontractors and return this form after submitting our proposals?

ANSWER: *No, you will not be completing the HUB form for this solicitation. This information is needed when a request for quote is issued for a specific project. If you have subcontractors you normally do business with, you can list them in your technical proposal; however, there is not an official project to actually quote.*

(2) If so, please also provide the official version of the required form.

ANSWER: *When/if the form is requested to be completed, the actual form to be completed will be supplied. See response to question 15c.*

(3) The form itself states that it's to be returned within eight (8) days after proposals are due. If it is needed at this stage in procurement, please confirm the amount of time available for returning.

ANSWER: *Additional information will be provided upon award. See response to question 15g.*

(4) Since this is a JOC, the dollar value and % of work performed under the contract for each subcontractor is unclear. If this form is required at this time, is it acceptable to list TBD in these columns?

ANSWER: *Completion of the form is not needed at this time.*

h) In the Technical Proposal, the Safety Matrix for Three (3) Years has spaces for five (5) years, including the current year. Current year information will be incomplete since it's around halfway through 2023. Please confirm or clarify: do we only include loss history information on this chart for 2022, 2021 and 2020?

ANSWER: *Submit available information for 2019 – 2022 and information available year to date for 2023.*

i) Section G of the Technical Proposal requires our full Safety Manual. Section F also requires our full Safety Manual. Are we to include this document multiple times in our package?

ANSWER: *No. One document in hard copy and a copy on the flash drive.*

j) The CIQ form's layout looks shuffled in places where we're to enter information. Is it acceptable to fill out as-is?

ANSWER: *Yes, complete as is.*

16. The items in the technical proposal referencing the sample AOW are to provide an example to submit a sample quote/timeline. The District is looking for how your company handles small scopes of work and turnaround time.

a) Has Garland ISD had JOC in the past?

ANSWER: *Yes, through EPCNT with other Districts.*

b) If so, who were the incumbents?

ANSWER: *There are no current contracts in place. Previously, a pool of contractors were available. Information is not available at this time.*

ADDENDUM 1
ATTACHMENT 1
QUESTIONS/CLARIFICATIONS AND ANSWERS

17. Tab C Relevant Experience Regarding Forms C-1 and C-2: C-1 asks for Texas school district experience, C-2 asks for previous experience, with the rest of the form identical. 99% of our clients are Texas school districts. Does that mean we can only show you five projects using form C-1, or can we also show relevant Texas work in C-2?

ANSWER: *You can show relevant work in C-2 as well.*

18. Tab E Key Personnel, In this section, it sounds like you only want to see our personnel, i.e., not consultants.
a) Is that true?

ANSWER: *True.*

b) Tab G Consultants, if the assumption for Tab E is true, would you like for us to ***list the engineering and consulting services we generally subcontract*** in Tab G? Or, a step further, would you like a list of consultants we recommend to provide those services? A step further still, are you expecting to see resumes for each firm's representative?

ANSWER: *You are welcome to list outside resources as long as they are identified by their company and not as employees. You may submit resumes'.*

c) In part 2, you ask for licensing, credentials, and experience, for all services and support provided. Based on the previous question, do you want to see proof of licensing or certification, such as copies of PE cards or other licensing certifications for each firm, or for each individual, or would you only like the credentials listed?

ANSWER: *You may provide the credentials and feel free to provide any relevant supporting documentation.*

19. Exhibit B Proposal form. This form asks for "Maximum Overhead and Profit %". However, this is included in the Coefficient in Job Order Contracting. Please confirm that we can just indicate "Included in Coefficient" in this field.

ANSWER: *Yes, you can note the information is included.*

20. Excel Sheet – Exhibit B Attach 1B. This form also includes "Overhead and Profit" and will automatically calculate it into the final price. However, this is included in the Coefficient in Job Order Contracting and adding it again will incorrectly increase the "Extended Total" price. Please confirm that we are to ignore this or put zero in the field.

ANSWER: *Yes, make a note on the spreadsheet out to the side and leave the column blank.*

ADDENDUM 1, ATTACHMENT 2,

1.4.4. TABLE: EVALUATION CRITERIA STEP 1:

Proposals will be scored according to the following scoring matrix:

Criteria Number	Criteria Description	Category Value
1.	Purchase Price- Price is evaluated separately from the Technical Proposal. See Criteria Number 3.	30 Points
	Proposal Price – This section will be scored based on proposer’s total price in the SAMPLE AOW, using the rates submitted in the Exhibit B JOC-Proposal form, in relation to ranking among other proposers’ prices.	30 points
2.	Quality and Reputation of Contractor—MUST have at least one (1) project that is similar in size and scope to be considered responsive. Category Total: 33 Points	
2 a.	MUST have at least one (1) project that is similar in size and scope to be considered responsive. (Use Sample AOW as a guide) References and Past Experience – Designated evaluators will check information submitted to score this section. Proposer will provide three (3) references (PROVIDE updated contact information for responses). (References shall be from Owner and/or Architect who directly oversaw the Project(s) listed under the past or recent experience category below) References should be from at least two (2) owners different owners. The District reserves the right to evaluate references not included in the submitted proposal. Answer the questions for each relevant project, <u>with emphasis on school, educational, and/or renovation experience, that your organization has in-progress or completed, completed as part of a JOC agreement.</u> Past experience-ISD projects and Commercial projects as a Job Order contractor. Proposer must provide a list of no more than five (5) projects in process and or completed in the last 3 years. Projects older than 3 years may be submitted if similar in size and scope. USE THE SAMPLE AOW as a guide and listing of types of services included in CSP 399-23. Include Client name, email, phone numbers, contract value, and contract duration. See evaluation details in the TECHNICAL PROPOSAL information. Proposer to indicate role on each project (Prime GC, Sub-Contractor, Joint Venture (JV), etc.) Litigation – Proposer is to indicate and list if actively involved in any litigation with only Owner organization(s) (past, previous, or current).	20 points
2 b.	Safety Safety – Submit OSHA (Occupational Safety and Health Administration) inspection logs for the last three years, a loss analysis from the offeror’s insurance carrier, and a loss history covering all lines of insurance coverage carried by the offeror for the past 3 years. Proposer to indicate if they have ever been denied workers compensation insurance or denied renewal of workers compensation insurance. Proposer to indicate if they have ever been fined by OSHA. Proposer to provide copy of company’s safety program or link to it. Safety Plan- Proposer to provide information when determining a <u>site specific Safety Plan for Assignment of Work (AOW) JOC work.</u> Include working with students on-site.	13 points
3.	Execution—75% of points from this section must be met to be a responsive proposal. Category Total: 35 points	
3 a.	Proposed Project Team(s) and Management approach to JOC projects. Proposer to include resumes of actual staff who will be assigned to JOC AOWs.	15 points
3 b.	Provide methodology for developing a Construction schedule and phasing plan for AOWs. Proposer to provide detailed execution plan demonstrating a thorough understanding of the scope, and methodology in compliance with the phasing plan/information provided in the Exhibit B, ATTACH 1B SAMPLE PROPOSAL PRICING.	20 points
Evaluation Criteria Step 2 - Based on ranking of the proposals after “Evaluation Criteria Step 1,” the financial strength will be evaluated for only the top ranked proposals or as many as deemed necessary by the district.		
4.	Financial Strength	
	Category Total:	2 points
	Financial status of the vendor (as rated by Dun & Bradstreet)	
	Proposer must indicate number of years as a D&B member.	
	Proposer to provide current D&B rating.	
	Proposals must include the DUNS account number and location of office. Failure to provide the DUNS number will result in zero (0) points.	
	Total Maximum Points	100
	INTERVIEWS, IF CONDUCTED, WILL BE THOSE SUBMITTALS IDENTIFIED FOR CONSIDERATION OF AWARD.	25