

## CHECKLIST TO DESIGNATE AREAS OF EVALUATION FOR REQUESTS FOR PROPOSAL (RFP)

|  |   |   |   |
|--|---|---|---|
|  | REQUISITION NUMBER  | DUE DATE  | TIME DUE  |
| MDOT PROJECT MANAGER   | JOB NUMBER (JN)   | CONTROL SECTION (CS)  |   |
| DESCRIPTION  |   |   |   |
| <b>MDOT PROJECT MANAGER:</b> Check all items to be included in RFP<br><br>WHITE = REQUIRED<br>** = OPTIONAL<br><br>Check the appropriate Tier in the box below |   | <b>CONSULTANT:</b> Provide only checked items below in proposal |   |
| <input type="checkbox"/><br><b>TIER I</b><br>(\$50,000 - \$150,000)  | <input type="checkbox"/><br><b>TIER II</b><br>(\$150,000-\$1,000,000) | <input type="checkbox"/><br><b>TIER III</b><br>(>\$1,000,000)   |   |
| <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  | Understanding of Service **   |
| <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  | <i>Innovations</i>  |
| <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  | Organizational Chart  |
| <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  | Qualifications of Team  |
| Not required as part of Official RFP   | Not required as part of Official RFP                                  | <input type="checkbox"/>  | Quality Assurance/Quality Control **  |
| <input type="checkbox"/>   | <input type="checkbox"/>  | <input type="checkbox"/>  | <b>Location:</b> The percentage of work performed in Michigan will be used for all selections unless the project is for on-site p=inspection or survey activities, then location should be scored using the distance from the consultant office to the on-site inspection or survey activity. |
| N/A  | N/A   | <input type="checkbox"/>  | Presentation **   |
| N/A  | N/A   | <input type="checkbox"/>  | Technical Proposal (if Presentation is required)  |
| 3 pages (MDOT Forms not counted) ( <b>No Resumes</b> )   | 7 pages (MDOT Forms not counted)                                      | 14 pages (MDOT forms not counted)                               | Total maximum pages for RFP <b>not including key personnel resumes.</b> Resumes limited to 2 pages per key staff personnel.   |

**PROPOSAL AND BID SHEET EMAIL ADDRESS – [mdot-rfp-response@michigan.gov](mailto:mdot-rfp-response@michigan.gov)**

### GENERAL INFORMATION

Any questions relative to the scope of services must be submitted by e-mail to the MDOT Project Manager. Questions must be received by the Project Manager at least five (5) working days prior to the due date and time specified above. All questions and answers will be placed on the MDOT website as soon as possible after receipt of the questions, and at least three (3) days prior to the RFP due date deadline. The names of vendors submitting questions will not be disclosed.

MDOT is an equal opportunity employer and MDOT DBE firms are encouraged to apply. The participating DBE firm, as currently certified by MDOT’s Office of Equal Opportunity, shall be listed in the Proposal.

### MDOT FORMS REQUIRED AS PART OF PROPOSAL SUBMISSION

**5100D** – Request for Proposal Cover Sheet

**5100J** – Consultant Data and Signature Sheet (Required only for firms not currently prequalified with MDOT)

**(These forms are not included in the proposal maximum page count.)**

# REQUEST FOR PROPOSAL

The Michigan Department of Transportation (MDOT) is seeking professional services for the project contained in the attached scope of services.

If your firm is interested in providing services, please indicate your interest by submitting a Proposal, Proposal/Bid Sheet or Bid Sheet as indicated below. The documents must be submitted in accordance with the latest (Consultant/Vendor Selection Guidelines for Services Contracts” and “Guideline for Completing a Low Bid Sheet(S)\*, if a low bid is involved as part of the selection process. **Reference Guidelines are available on MDOT’s website under Doing Business > Vendor/Consultant Services >Vendor/Consultant Selections.**

**RFP SPECIFIC INFORMATION**

ENGINEERING SERVICES                       BUREAU OF TRANSPORTATION PLANNING                       OTHER

THE SERVICE WAS POSTED ON THE ANTICIPATED QUARTERLY REQUESTS FOR PROPOSALS  
 NO     YES    DATED \_\_\_\_\_ THROUGH \_\_\_\_\_

|   |   |
|---|---|
| <input type="checkbox"/> <b>Prequalified Services</b> – See the attached Scope of Services for required Prequalification Classifications. | <input type="checkbox"/> <b>Non-Prequalified Services</b> – If selected, the vendor must make sure that current financial information, including labor rates, overhead computations, and financial statements, if overhead is not audited, is on file with MDOT’s Office of Commission Audits. This information must be on file for the prime vendor and all sub vendors so that the contract will not be delayed. <b>Form 5100J is required with Proposal for firms not currently prequalified with MDOT</b> |
|---|---|

**Qualifications Based Selection** – Use Consultant/Vendor Selection Guidelines

**For all Qualifications Based Selections**, the selection team will review the information submitted and will select the firm considered most qualified to perform the services based on the proposals. The selected firm will be asked to prepare a priced proposal. Negotiations will be conducted with the firm selected.

**For a cost plus fixed fee contract**, the selected vendor must have a cost accounting system to support a cost plus fixed fee contract. This type of system has a job-order cost accounting system for the recording and accumulation of costs incurred under its contracts. Each project is assigned a job number so that costs may be segregated and accumulated in the vendor’s job-order accounting system.

**Qualification Based Selection / Low Bid** – Use Consultant/Vendor Selection Guidelines. See Bid Sheet instructions for additional information.

For Qualification Review/Low Bid selections, the selection team will review the proposals submitted. The vendor that has met established qualification threshold and with the lowest bid will be selected.

**Best Value** – Use Consultant/Vendor Selection Guidelines, See Bid Sheet Instructions below for additional information. The bid amount is a component of the total proposal score, not the determining factor of the selection.

**Low Bid** (no qualifications review required – no proposal required.) See Bid Sheet Instructions below for additional instructions.

**BID SHEET INSTRUCTIONS**

Bid Sheet(s) must be submitted in accordance with the “Guidelines for Completing a Low Bid Sheet(s)\* (available on MDOT’s website). Bid Sheet(s) are located at the end of the Scope of Services. Submit bid sheet(s) with the proposal, to the email address: [mdot-rfp-response@michigan.gov](mailto:mdot-rfp-response@michigan.gov). Failure to comply with this procedure may result in your bid being rejected from consideration.

**PARTNERSHIP CHARTER AGREEMENT**

MDOT and ACEC created a Partnership Charter Agreement which establishes guidelines to assist MDOT and Consultants in successful partnering. Both the Consultant and MDOT Project Manager are reminded to review the [ACEC-MDOT Partnership Charter Agreement](#) and are asked to follow all communications, issues resolution and other procedures and guidance’s contained therein.

**NOTIFICATION  
MANDATORY ELECTRONIC SUBMITTAL**

**Proposals submitted for this project must be submitted electronically.**

**The following are changes to the Proposal Submittal Requirements:**

- Eliminated the Following Requirements:
  - Safety Program
  - Communication Plan
  - Past Performance as *a separate section*
  - Separate section for DBE Statement of goals. Include information in Qualification of Team section
  
- Implemented the Following Changes:
  - All proposals require an Organization Chart
  - Resumes must be a maximum of two pages
  - Only Key (lead) staff resumes may be submitted
  - Tier III proposal reduced from 19 to 14 pages
  - Forms 5100D, 5100I, and 5100G combined – 5100D
  - Forms 5100B and 5100H combined – 5100B
  - RFP's will be posted on a weekly basis -- on Mondays

**The following are Requirements for Electronic Submittals:**

- Proposals must be prepared using the most current guidelines
- The proposal must be bookmarked to clearly identify the proposal sections (See Below)
- For any section not required per the RFP, the bookmark must be edited to include “N/A” after the bookmark title.  
**Example:** Understanding of Service – N/A
- Proposals must be assembled and saved as a single PDF file
- PDF file must be 5 megabytes or smaller
- PDF file must be submitted via e-mail to [MDOT-RFP-Response@michigan.gov](mailto:MDOT-RFP-Response@michigan.gov)
- MDOT's requisition number and company name must be included in the subject line of the e-mail. The PDF shall be named using the following format:
  - Requisition#XXX\_Company Name.PDF
- MDOT will not accept multiple submittals
- Proposals must be *received* by MDOT on or before the due date and time specified in each RFP

**If the submittals do not comply with the requirements, they may be determined unresponsive.**

The Consultant's will receive an e-mail reply/notification from MDOT when the proposal is received. Please retain a copy of this e-mail as proof that the proposal was received on time. **Consultants are responsible for ensuring the MDOT receives the proposal on time.**

**\*\*Contact Contract Services Division immediately at 517-373-4680 if you do not get an auto response\*\***

**Required Bookmarking Format:**

- I. Request for Proposal Cover Sheet Form 5100D
  - A. Consultant Data and Signature Sheet, Form 5100J (if applicable)
- II. Understanding of Service
  - A. Innovations
- III. Qualifications of Team
  - A. Structure of Project Team
    - 1. Role of Firms
    - 2. Role of Key Personnel
  - B. Organization Chart
  - C. Location
- IV. Quality Assurance / Quality Control Plan
- V. Resumes of Key Staff
- VI. Pricing Documents/Bid Sheet (if applicable)

**2/14/12**

**Michigan Department of Transportation**  
**SCOPE OF SERVICE**  
**FOR**  
**SPECIALTY SERVICES**  
**Computerized Office Technician Training Course**

**CONTROL SECTION(S):** Various

**JOB NUMBER(S):** Various

**PROJECT LOCATION:** Statewide

**DESCRIPTION OF WORK:**

The Consultant shall provide, to the satisfaction of the Michigan Department of Transportation (MDOT), Computerized Office Technician (COT) Training Courses and COT Refresher Exam Courses at various locations throughout Michigan for **the training of consultant personnel** utilizing the MDOT FieldManager software program. The Consultant will be responsible for scheduling, preparing for, and conducting COT training and issuing certificates to students with passing scores. The Consultant will be responsible for attending all MDOT technical meetings pertaining to the COT training program (approximately four per year).

The services described herein shall be **financed by training fees determined by the consultant. The fees are to be on a per student basis.** Projected per student cost will be submitted with this proposal (see attached bid sheet). The Consultant will comply with applicable federal and state laws, rules, and regulations.

**ANTICIPATED START DATE:** November 2013

**ANTICIPATED COMPLETION DATE:** September 30, 2015

**PRIMARY PREQUALIFICATION CLASSIFICATION:** N/A

**SECONDARY PREQUALIFICATION CLASSIFICATION:** N/A

**DBE PARTICIPATION:** N/A

**KNOWLEDGE AND EXPERIENCE REQUIREMENTS:**

The consultant must demonstrate knowledge and experience with the following items including any special provisions for these topics:

1. Certified Payroll procedures, BOH IM 2009-07
2. Contract modification procedures, BOH IM 2012-03
3. Records retention procedures, BOH IM 2008-09

4. Procedures outlined in construction manual
5. Procedures outlined in QA manual, Density manual, HMA manual
6. Material Source Guide
7. Documentation Guide procedures
8. Prompt payment procedures, BOH IM 2012-12
9. Fieldmanager software
10. Material Testing/Certification procedures
11. Special, Supplemental and Notice to Bidder Provisions
12. Overdue finals
13. Final Estimate/project close-out procedures
14. Instructor must be a Certified Office Technician
15. Construction Inspection
16. MicroSoft Office Software
17. Knowledge of HMA, concrete and bridge inspection
18. Testing requirements for HMA, concrete, aggregate
19. Soil erosion procedures
20. Density testing procedures
21. Force account procedures
22. Stockpiles usage

**QUESTIONS:**

All questions are to be submitted electronically to the MDOT Project Manager (PM). All responses will be posted on the MDOT website at the following link:

[http://www.michigan.gov/mdot/0,1607,7-151-9625\\_32842---,00.html](http://www.michigan.gov/mdot/0,1607,7-151-9625_32842---,00.html)

**MDOT PROJECT MANAGER:**

Mohammad Azam

Operations Review Engineer

MDOT – Construction Field Services Division

Construction Contracts Unit

P.O. Box 30049

Lansing, MI 48909

517-636-0832

517-322-5139 (fax)

[AzamM1@michigan.gov](mailto:AzamM1@michigan.gov)

The Consultant shall contact the PM prior to beginning any work on this Project.

**CONSULTANT RESPONSIBILITIES:**

The Consultant shall furnish all services necessary to conduct and complete the training courses described herein. The Consultant shall also furnish all materials, equipment, supplies, and incidentals necessary to perform the Services (other than those designated in writing to be furnished by the Department), and check and/or test the materials, equipment, supplies, and incidentals as necessary in carrying out this work. The Services shall be performed to the satisfaction of the Department consistent with applicable professional

standards. The instructor shall be an employee of the primary consulting firm responding to this RFP and not a sub consultant.

- A.** The Consultant's principal contact with the Department shall be through the designated Project Manager.
- B.** The Consultant agrees to demonstrate knowledge of, and performance in compliance with, the COT training program and COT Refresher Exam Courses of the Department.
- C.** The Consultant must demonstrate extensive knowledge of FieldManager and office documentation procedures.
- D.** The Consultant will furnish all services and labor necessary to conduct and complete the work for the services described herein. The Consultant will also furnish all materials, supplies, and incidentals necessary to perform the services (other than those designated in writing to be furnished by the Department). The services will be performed to the satisfaction of the Department consistent with applicable professional standards.
- E.** The Consultant is responsible for all costs associated with the training.
- F.** The Consultant will notify the PM, in writing, prior to any personnel changes from those specified in the Consultant's original approved proposal. Any personnel substitutions are subject to review and approval of the PM.
- G.** The Consultant will provide the necessary personnel to adequately perform the requirements of this project within the specified timeframes.
- H.** At the request of the Department, the Consultant will furnish any and all information or data relating to the services and work products described herein. All work materials or products generated by the Consultant's staff while working for MDOT under this project are the sole property of MDOT, and must remain with MDOT's Technical Training Unit upon termination of this contract.
- I.** The work location for the Consultant's staff will be their office. MDOT will not pay mileage for the Consultant to travel to and from work or to attend required meetings.

### **CONSULTANT RESPONSIBILITIES cont'd:**

**Kick-Off Meeting:** Within two weeks of award, the Consultant shall coordinate with the PM to schedule a meeting with MDOT's Project Team. At this meeting, project expectations will be discussed and documented for the following:

- Specific responsibilities pertaining to the training
- Quality assurance checks
- Other topics as necessary to ensure the successful delivery of the training
- Consultant should conduct at least one class per year in each of the following area of Metropolitan Detroit, Upper Peninsula and Central Michigan

**COT Training Classes:** The Consultant will make arrangements for and conduct COT training classes AND COT Refresher Exam Courses as described herein.

- Provide all materials, equipment, supplies, and classroom accommodations.
- Provide the PM with resumes and experience of all instructors.
- Inform the PM of all personnel changes in reference to the instructor(s)
- Schedule, prepare for, and conduct COT courses using FieldManager.
- Attend meetings as directed by the PM.
- Verify students meet prerequisite of FieldManager training prior to the COT class.
- Plan for and make all arrangements for training classes.
- Provide all training materials.
- Conduct Training classes as needed. **Maximum of 15 participants per class.**
- Provide MDOT PM with a class list and grades
- Solicit, identify, and notify attendees of the training.
- Conduct final exam to students, grade, and **issue a certification to students who pass the exam.**
- Provide class evaluations to students and deliver copies to the PM
- Provide the PM with test scores for each attendee along with completed final exam sheets.

Prior to scheduling any COT training, the Consultant shall participate and observe an MDOT COT training course with a COTAG member.

**Consultant Reports:** Prepare such periodic, intermediate and final reports and records as may be required by the Department and as are applicable to the Project, which may include, but are not limited to:

- a. Class Attendance List
- b. Grade of each student
- c. Other records and/or reports as required by the PM as requested.

**Project Close-Out Meeting** – The Consultant will arrange a meeting with the PM to close-out the project.

**COT ADVISORY GROUP (COTAG):**

The COTAG provides input and guidance on the training. The COTAG consists of individuals throughout MDOT with a background in project administration and documentation. The PM and the COTAG make up the MDOT Project Team. Meetings will be held at MDOT’s Construction Field Services Building in Lansing, MI, unless otherwise agreed upon by the PM.

The Consultant will carry out this training under the oversight of the MDOT Project Team. Throughout the duration of this project, the consultant will provide progress reports after each training session.

**MDOT/COTAG RESPONSIBILITIES:**

- Provide technical assistance to the consultant.
- Draft and approve updates to the COT AND COT Refresher Exam Course manuals.
- Attend all COT meetings.
- Provide the PM with all documents to be provided to the consultant.
- Responsible for content of training materials.
- Keep a master list of all class participants and their scores pertaining to COT AND COT Refresher Exam Courses training.
- Schedule and inform the COTAG and Consultant of all meetings.
- Provide Consultant with a master manual and all updates (electronic or otherwise).
- Provide Consultant with course exam and answers.

**CONSULTANT PAYMENT:**

There are no payments to the Consultant. This is a ZERO DOLLAR Contract.

**CONFIDENTIAL INFORMATION:**

Your reports and conclusions are for the confidential information of the State of Michigan and you will not disclose these conclusions, in whole or in part, to any unauthorized person without the prior written consent of the PM. Confidential information shall not include information (a) already lawfully known to or independently developed by you, (b) disclosed in published materials, (c) generally known to the public, (d) lawfully obtained from any third party, or (e) required to be disclosed by law.

**SCORING CRITERIA FOR EVALUATION OF PROPOSALS:**

Scoring and evaluation will be performed in accordance with MDOT’s Consultant Vendor Selection Guidelines found at: [http://michigan.gov/mdot/0,1607,7-151-9625\\_32842---.html](http://michigan.gov/mdot/0,1607,7-151-9625_32842---.html). The guidelines are summarized below. Refer to the actual guidelines for a complete description of each criterion.

- 1. Understanding of Service (35 Points)**  
Describe your understanding of MDOT’s needs. Describe the services you intend to provide to meet those needs. This information is to be based on the scope of services.

Include any task/activity you believe should be added to the scope of services or any task/activity in the current scope of services that you believe should be altered.

**2. Qualification of Team**

**(55 Points)**

The scoring of the qualifications of the team will be one score based on the structure of the team, their qualifications, and demonstrated staffing capacity of the company to meet our needs.

Structure of the Project Team

Describe the structure of the project team. Include the roles of all key personnel. Describe the use of any sub-consultants including the service to be provided, role, and percent of role the sub-consultant is expected to provide.

Experience of the Project Team

Describe the quality, extent, and relevance of experience of individuals assigned to the project team. Include their experience and knowledge of FieldManager and the Computerized Office Technician process. List the team's direct participation in other related projects, including the type and complexity of projects(s).

Provide resumes for each key staff. The format is discussed in Part V, B, 2 of the Consultant/Vendor Selection Guidelines. Go to: [http://michigan.gov/mdot/0,1607,7-151-9625\\_32842---.html](http://michigan.gov/mdot/0,1607,7-151-9625_32842---.html). Limit each resume to three (3) pages.

Availability of the Project Team

Provide a statement of the availability of key staff (MDOT Form 5100G) to provide services to MDOT and mitigation strategy should key staff no longer be available for this project.

**3. Location**

**(5 Points)**

Consideration will be given for the percentage of contracted work performed in Michigan. Provide the location of where the work will be performed.

**4. Past Performance**

**(20 Points)**

Provide references and examples of similar work performed for other agencies.

**5. Student Cost**

**(20 Points)**

The lowest projected per student charge will receive 20 points and the other bids will receive progressively lower points based on a percentage formula.

## GENERAL ORGANIZATION INFORMATION

### REQUIRED RESPONDENT INFORMATION

Please provide the following required respondent information. Failure to respond to each requirement may disqualify the respondent from further participation in this RFP.

**RESPONDENT NAME AND ADDRESS:** Provide name, address, principle place of business, telephone number of legal entity with whom the contract is to be written, and the web page address.

|                          |  |                       |
|--------------------------|--|-----------------------|
| <b>Name and Title:</b>   |  |                       |
| <b>Address:</b>          |  |                       |
| <b>City, State, Zip:</b> |  |                       |
| <b>Phone:</b> ( )        |  | <b>Facsimile:</b> ( ) |
| <b>Web Page:</b>         |  |                       |

### LOCATION ADDRESS

|                          |  |
|--------------------------|--|
| <b>Address:</b>          |  |
| <b>City, State, Zip:</b> |  |

### ORGANIZATION AND YEAR:

Please provide the legal status and business structure (corporation, partnership, sole proprietorship, etc.) of the respondent and the year the entity was established.

|                |  |              |  |
|----------------|--|--------------|--|
| <b>Status:</b> |  | <b>Year:</b> |  |
|----------------|--|--------------|--|

### RFP CONTACT:

Please provide the following information of the respondent's RFP contact:

|                          |  |                       |
|--------------------------|--|-----------------------|
| <b>Name and Title:</b>   |  |                       |
| <b>Address:</b>          |  |                       |
| <b>City, State, Zip:</b> |  |                       |
| <b>Phone:</b> ( )        |  | <b>Facsimile:</b> ( ) |
| <b>Web Page:</b>         |  |                       |

---

## Bid Sheet

---

All entries on this page must be handwritten in ink or computer generated. This page provides for costs by payment category. This is provided as an example. Priced proposal costs may be required after selection, in accordance with the MDOT Priced Proposal Guidelines ([Guidelines](#)).

---

**PROJECT DESCRIPTION: Computerized Office Technician (COT) Instructor**

---

| <u>Training Type</u>              | <u>Per Student Rate</u> |
|-----------------------------------|-------------------------|
| <b>COT Training Course:</b>       | \$ _____                |
| <b>COT Refresher Exam Course:</b> | \$ _____                |
| <b>TOTAL BID PRICE:</b>           | \$ _____                |