



**Board of Regents of the University  
System of Georgia**

**Request for Qualifications  
(Step I)**

**and**

**Request for Proposals  
(Step II)**

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**To Provide**

***Program Management Services***

**for**

**Project No. J-348**

**“Expansion of Tech Square, Phase III”**

**Georgia Institute of Technology  
Atlanta, Georgia**

**Solicitation Issue Date: August 15, 2019**  
**Qualifications Packages Due: September 05, 2019**

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# STEP I REQUEST FOR QUALIFICATIONS

## Program Management Services Project No. J-348 “Expansion of Tech Square, Phase III” Georgia Institute of Technology, Atlanta, Georgia

The Board of Regents of the University System of Georgia (“BOR”) as (“Owner”), on behalf of Georgia Institute of Technology (“GT”), (“User”) is soliciting statements of qualifications from firms interested in providing Program Management services for a project known as **Project No. J-348, “Expansion of Tech Square, Phase III”** at Georgia Institute of Technology, Atlanta, Georgia. This Request for Qualifications (RFQ) seeks to identify potential providers of the above-mentioned services. Some firms that respond to this RFQ, who are determined by the Owner to be especially qualified, may be deemed eligible and may be invited to interview and offer proposals for these services. All respondents to this RFQ are subject to instructions communicated in this document, and are cautioned to completely review the entire RFQ and follow instructions carefully. BOR reserves the right to reject any or all statements of qualifications or proposals, and to waive technicalities and informalities at their discretion.

### 1. GENERAL PROJECT INFORMATION

#### **Project Background**

Opened in 2003, Georgia Tech’s exciting Technology Square innovation district, encompasses education, research, hotel, office, residential and retail uses and serves as an urban ‘main street’ for the campus and the Midtown Atlanta community. Analysis of the economic impact of Technology Square shows approximately \$1.85 billion in private investment capital to the initial development costs of \$175 million for the first phase of Technology Square delivered in 2004. In addition, approximately 16,000 full time jobs (not including construction) have been added to the district since the project was delivered.

Recently delivered in the district is NCR’s new world headquarters and Coda, a signature mixed-use office, computing center and retail complex. With this new growth, Tech Square will total 3 million SF of space with \$1 billion invested. Tech Square has been exceedingly beneficial to Georgia Tech. Its tremendous success has brought national recognition to the Institute’s commercial outreach efforts.

A magnet for business, the area has attracted over 20 industry innovation centers including AT&T Mobility, Panasonic Automotive, Southern Company, Delta Airlines, The Home Depot, Coca-Cola Enterprises and ThyssenKrupp Elevator Americas.

The district has also become a unique sector of campus, offering an urban experience to students and faculty, in contrast to the almost pastoral main campus setting just next door. With Tech Square, Georgia Tech can offer corporate outreach, student opportunities for internships and employment, and support for industry partners that is truly unique.

Georgia Tech is embarking on developing the last significant parcels of land in the Tech Square district. This provides a prime opportunity to holistically study and plan for such a significant part of the Georgia Tech campus. This effort is crucial for the continued development of Tech Square and will inform the design of this project.

### **Project Description**

Within the heart of Midtown, Georgia Tech proposes a third phase of development at Technology Square which is recognized as the center of innovation in Atlanta. This project anticipates the construction of approximately 420,000 GSF to house the expansion of the Scheller College of Business, Stewart School of Industrial and Systems Engineering, economic development programs, classrooms, retail and limited parking.

This project will be located on a highly visible site; every view of Tech Square engages it. The project site is bordered by Spring Street, 5<sup>th</sup> Street, Biltmore Place and West Peachtree Streets. Located across from the GT Hotel and Conference Center, it will be convenient to campus visitors as well as the growing residential population in the area. The intersection of 5<sup>th</sup> Street and Spring Street is the heart of the Technology Square District and is the last significant block available for development in the district.

Being located on such a key site, it is vital that this project is developed thoughtfully, while maximizing available capacity. In keeping with the scale and density of the surrounding Tech Square neighborhood, the site will be developed with academic, research, classroom and university-related retail program elements.

This expansion of Tech Square will be more prominent than the initial Tech Square buildings, however it will maintain the scale of the neighborhood. The full development of the block is envisioned to be a phased approach. A research and academic tower(s), underground parking and a public element would be constructed in this phase. Stewart School of Industrial & Systems Engineering (ISyE) and portions of the Scheller College of Business (SCOB) will utilize the initial tower(s). Architecturally, the tower(s) might have distinct elevations in order to maximize naming opportunities. The public element could stand alone as a distinct use, perhaps formal entry, iconic event space, meeting space, or a tiered space that could double as theatre or auditorium.

Programmatically, the project will enable the potential expansion of the SCOB with its already deep ties to the business community and allow for greater connectivity for the world renowned ISyE Program with industry partners as we move this program to the edge of campus into the core of the Midtown business community. This project will assist in the collocation of academic programs to address space deficiencies; allow modernization and provide expansion capacity for growing programs and allow them to compete for the best students, faculty and staff. The backfill space opportunities will allow other programs to strategically grow and relocate to develop even stronger adjacencies and research neighborhoods in campus core space. The alignment of the School of Industrial and Systems Engineering and the Scheller College of Business adds to the innovation ecosystem.



Figure 1 Tech Square Phase 3 Vicinity Map

### Sustainable Approach

The project will incorporate the requirements of the Energy Efficiency & Sustainable Construction Act of 2008 (O.C.G.A. 50-8-18) and it is the desire of the Owner to incorporate sustainable design and construction concepts in the project where feasible to do so. Further, Georgia Peach certification is required with commissioning.

### Project Delivery Method

The delivery method for this Project will be Construction Management-at-Risk (CM), and, as a minimum, will employ the services of a Planner/Programmer, Design Professional, Construction Manager and a Commissioning Agent in addition to the services of the Program Manager.

### Project Budget

The total project budget is \$200M. The final Stated Cost Limitation (SCL) or construction cost will be refined as part of the planning and conceptual design process and may be revised by the Owner due to final programmatic requirements, funding availability or other circumstances.

### Program Management Fee

The shortlisted Program Management firms are required to submit a fee proposal in the Step II – Request for Proposals (RFP) phase. *The fee structure for design professional services relative to the schedule, and fee amounts will be agreed upon by the Owner and the Program Manager prior to the start of program management services.)*

### Project Schedule

The Planning, Programming and Conceptual Design Professional's services are anticipated to commence by **Fall 2019** with final documents anticipated for completion in **Spring 2020**, after which a Design Professional will be hired to complete the design through construction documents. The Program Manager will assist in developing an overall project schedule from programming through

construction completion. The start of construction is contingent on the availability of funding. *(All of the dates above are estimates which are subject to change).*

## **2. PROGRAM MANAGEMENT SERVICES REQUIREMENTS**

The Owner is seeking the services of a program management firm (the “Program Manager” or “PM”) to represent the Owner and Georgia Institute of Technology throughout the planning and programming activities (including the development of data, analysis, concepts, and recommendations), design, and pre-GMP construction phase of the project to ensure that all elements of the work meet the required quality, design standards, budget and construction schedule. Further, the Owner may seek to employ the services of the PM through the executed GMP, completion of the 100% Construction Documents, and Construction Administration.

The successful Program Manager will have a clearly-defined delegation of authority to act on the Owner’s behalf, and will provide the resources and expertise necessary to understand and be responsible for, a broad spectrum of services related to the project.

The Program Manager, as part of its services, will assist with developing a strategy for the best approach for the successful completion of the project. The PM will provide collegial collaboration, guidance, and assistance in the preparation of a schedule and a reliable cost estimate. The Owner insists that all parties to this project approach it with a spirit of teamwork, openness and partnership.

## **2. SCOPE OF SERVICES**

The following is a list of some of the representative services to be provided by the PM:

### **General Duties: The PM will perform a variety of duties within the following broad areas:**

- a. Identify program concepts and associated budgets; validate that this Project is financially feasible.
- b. Prepare a task-related project delivery schedule.
- c. Deliver a fully developed program to the Owner and Georgia Institute of Technology “GIT”.
- d. Develop and implement a cost management (cost containment) strategy that will identify and track decisions that have an impact on cost.
- e. Work with user-group representatives and prepare a program validation schedule in conjunction with the Owner and Georgia Institute of Technology.
- f. Represent the interests of the Owner and GIT user groups during the preparation of schematic and design development plans and construction drawings.
- g. Develop a framework for negotiating the guaranteed maximum price (GMP) and, if appropriate, the subsequent lump sum contract with the CM/GC.
- h. Provide construction administration services to monitor and manage construction activities that will affect the Project’s cost, schedule and quality.
- i. Coordinate the final building punchlist, including any commissioning all operating systems on behalf of the Owner and GIT with a full and complete set of all building-related documents at occupancy; provide electronic file copy of the same on computer disk (CD) by design professional of record including “as-built” drawings.
- k. Perform activities not specifically identified but that are necessary and convenient to the best interests of the Owner and GIT in completing the Project.

### **B. Typical Duties: More specifically, the PM will perform the following:**

- a. Review the program concept and budget constraints to assure that the Project is financially feasible.

- i. Develop a preliminary schedule for the phases of work and continue to refine to provide a robust schedule that is informed based on multiple funding sources (state vs. non-state; public vs. private), and funding availability.
  - ii. Establish and coordinate appropriate meeting schedule and attendance list; prepare an agenda and meeting notes and task lists after each meeting.
  - iii. Consolidate all the projects planning actions and supporting documentation that have occurred to date.
  - iv. Meet with campus facilities staff, user-group representatives, administration, etc., to gain their perspectives of the Owner's project requirements.
  - v. In combination with appropriate campus personnel and in support of the program validation effort, tour and photograph the Project site.
  - vi. Prepare a synopsis of the Owner's project requirements and make appropriate estimates and calculations to assure that the expected project scope can be achieved adequately within the available funds; identify any shortfalls and suggest (other than the provision of additional funds) methods of achieving balance scope and budget.
  - vii. Compile the result of the preceding tasks into a bound report that will be presented to the Owner and GIT in draft form for approval. Upon approval, provide five bound copies of the report to Owner.
  - viii. Create and distribute meeting notes, decision notes, and related project documentation as prescribed.
- b. Prepare a project task-related schedule.
- i. Identify essential or major points of interest to Owner and users, and suggest other activities that might have been overlooked or may be the best interests of the Owner and GIT.
  - ii. Prepare a draft schedule for the entire Project, to include Design and Construction activities.
  - iii. Discuss the draft schedule with GIT to assure that the schedule is consistent with GIT's needs; modify the schedule as necessary to conform to GIT's needs, or negotiate a modified level of expectation with GIT; document all conclusions resulting from the process.
- c. Develop and implement a cost management (cost containment) strategy that will identify and track decisions that affect cost.
- i. Identify appropriate costs associated with each phase of the Project.
  - ii. Identify cost tracking methodology that will allow all parties to compare projected costs with actual costs in "real time."
  - iii. Develop a methodology to inform all parties, including the Design Professional, Owner and CM/GC, if it is expected or projected that expended costs will exceed the cost model. This methodology must include three suggested methods to regain balance between scope and cost. As a minimum, cost containment strategies should include the following considerations:
    1. Maintenance of program scope;
    2. Hazardous materials assessment;
    3. Existing utility capacity analysis;
    4. Peer review of the Project drawings.
  - iv. Create a project file that tracks all cost-related decisions and includes the rationale for them: provision to Owner with this record in bound form upon the completion of the Project.
- d. Participate in the process that will result in the selection of the Construction Manager on CM/GC projects.
- e. Facilitate discussions and meetings among the user group representatives, the Owner, essential members of the GIT staff, the Design Professional, and the CM/GC.
- i. Schedule meetings with the approval of the GIT to meet with the campus-identified user groups. Explain in detail the process and methods that will be used to construct

- “their” project; prepare and provide handouts and other materials appropriate to support this task.
- ii. Maintain a list of the official campus user-group representatives.
  - iii. Monitor and document the Design Professional’s program validation process and provide Owner and GIT (including user-group representatives) with a copy of the validated program, signed-off on by GIT and the Design Professional.
- f. Represent the interests of the Owner and GIT during the preparation of the schematic, design development and construction drawings, including, but not limited to:
- i. Provide cost containment and cost monitoring.
  - ii. Provide cost-effective decisions.
  - iii. Insure compatibility with GIT’s design expectations and Master Plan.
  - iv. Insure consistency with the scope expectations of the Owner and GIT as documented in the program validation phase of the Project.
  - v. Insure provision of all necessary services and utilities.
  - vi. Provide necessary level of environmental review and documentation.
  - vii. Keep the Owner and GIT fully aware of the progress of the Project.
  - viii. Maintain the Project schedule.
  - ix. Provide construction quality assurance and compatibility with Project specifications.
  - x. Provide peer review and constructability of the construction drawings.
  - xi. Insure that the Design Professional produces a design that is in compliance with national and state codes as they apply to fire and life safety, ADA, mechanical, electrical, telecommunications, and other standards.
  - xii. Insure interior finishes, lighting, furniture, other elements provided as part of this Project to take into consideration sustainable elements when appropriate, feasible, and cost effective.
  - xiii. Insure all permits are obtained in an efficient and timely manner.
- g. Develop framework for negotiating the guaranteed maximum price (GMP) and if appropriate, the subsequent lump sum contract with the CM/GC.
- i. Schedule meetings between the Owner, GIT, Design Professionals, and the CM/GC, including all other stakeholders, as appropriate.
  - ii. Create the draft GMP and if appropriate, lump sum contract, to the satisfaction of the Owner and GIT.
  - iii. Monitor the actions and track decisions that resulted from this GMP negotiation.
  - iv. Provide meeting minutes and a “decision log” at the conclusion of the GMP negotiation session.
  - v. Compile the final agreement into a contract document suitable for execution by all appropriate parties, obtaining signatures, and distributing the fully executed contract: providing same services if a lump sum contract is subsequently desired by the Owner and GIT.
  - vi. Provide monthly reports to include as a minimum a project team directory, project budget & cost management information, schedules, reports/meeting minutes, progress photos, and notification of any present or pending issues that may have budget, schedule or quality impact.
- h. Provide construction administration services to monitor and manage construction activities that will affect the Project’s cost, quality and schedule.
- i. Monitor the CM/GC’s GMP and/or lump sum contract on behalf of the Owner and GIT; take appropriate actions to assure that the CM/GC maintains consistency with the terms and conditions of its contract.
  - ii. Monitor construction activities to assure consistency with contractual projects and quality specification and expectations.
  - iii. Maintain an “on-site” presence during all construction activities to represent the interests of the Owner and GIT, assist in clarifying design or construction issues where input from the Owner and GIT is required, and assure the Owner and GIT the Project is well and duly constructed.



- iv. Monitor the Construction Material Testing and Special Inspections
- i. Coordinate the final building punch list, including all operating systems, on behalf of the Owner and GIT.
  - i. Represent the interests of the Owner and GIT during the punch list phase of the Project and expedite this process whenever possible.
  - ii. Accept all guarantees and warranties on behalf of the Owner and GIT.
  - iii. Monitor all “system start-ups” and “commissioning.”
  - iv. Supervise the CM/GC’s turnover of the building to the Owner and GIT including coordination of all required user training of building equipment/systems; turnover and coordination of all Operation and Maintenance (O/M) manuals; and coordination of turnover of all keys/tools necessary for operation of the building and its systems.
- j. Provide the Owner and GIT with at full and complete set of all building-related documents at Occupancy.
  - i. Provide a full and complete cost-expense account (budget reconciliation), separated both by phases of the Project and by major contractor.
  - ii. A full and complete set of all guarantees and warranties that are tabbed to indicate the provisions of each guarantee or warranty.
  - iii. Provide certification that mechanical and electrical systems have been properly installed and that each system is operating properly.
  - iv. Provide a fully accurate set of “as built” documents for the building and provide electronic file copy of same document on computer disk (CD) by design professional of record.
  - v. Provide and/or undertake other activities appropriate or necessary to represent the interests of the Owner and GIT as part of the Project’s completion and occupancy including assisting with coordination of furnishings and fixtures installation.
- k. Track actual expenditures against the budget.

**C. Other Expectations: The PM should also have experience to meet the following expectations:**

- a. Interact in a positive and supportive manner as a team member.
- b. Provide clear, concise and accurate reports on complex budget and construction matters on a regular basis, including digital photographic documentation of project progress.
- c. Be knowledgeable of the State of Georgia’s construction funding process.
- d. Be knowledgeable of the laws of the State of Georgia regarding public works construction contracting.
- e. Be Knowledgeable of GIT’s Yellow Book Design Standards.

**4. QUALIFICATIONS REVIEW PROCESS**

Selection of the Program Management Professional will be a multi-step process generally following the steps outlined in the State Construction Manual.

**Step I - Qualifications Review**, is initiated with this RFQ for the purpose of acquiring Statements of Qualifications from prospective PM firms. Finalist firms will be made by a Selection Committee consisting of representatives of the BOR, Georgia Institute of Technology and GSFIC. The Selection Committee will receive and review Statements of Qualifications submitted in response to this RFQ and then evaluate the submittals based on the criteria for evaluation listed below:

**Minimum Qualifications Required (evaluated on a pass/fail basis by the Selection Committee)**

- i. The firm or its principals are not ineligible, debarred, suspended or otherwise excluded from bidding or contracting by any state or federal agency, department or authority.
- ii. The firm must have all necessary, valid and current licenses to do business in the State of Georgia.

- iii. The firm or its principals have not been terminated for cause or currently in default on any public works contract.
- iv. The firm must provide a sworn statement attesting to compliance with the minimum criteria listed above and provide supporting documentation as requested as part of the deliverables in the Statement of Qualifications.

The Selection Committee will evaluate the submittals which have met the above minimum qualifications based on the criteria for evaluation listed below:

**Criteria for Evaluation of Statements of Qualifications**

**25% Factor:** Stability of the firm, including the firm’s corporate history, growth, resources, continuity of team, familiarity with the Atlanta market, form of ownership, litigation history, financial information, and other evidence of stability.

**45% Factor:** Firm’s relevant project team experience and qualifications, including the demonstrated ability of the team working together leading the efforts of strategic planning, programming and conceptual design projects comparable in complexity, size, and function, for Owners such as the State of Georgia and other similarly structured organizations. This includes relevant experience and qualifications of the principal Program Management team and lead staff, and evidence of relevant competencies for this project.

**30% Factor:** Firm’s apparent suitability to provide services for project, including past performance and firm’s apparent fit to the project type and/or needs of the Owner, performance on past work and any special or unique qualifications for the project, current and projected workloads, the proximity of office to project location, and services offered by the firm. The firm’s non-discrimination policies, any affirmative action policies and/or stated efforts for the inclusion of Minority-Owned Business Enterprises and/or Woman-Owned Business Enterprises will be a part of this evaluation. Experience and proficiency with the Program Management of public buildings with regard to the areas of public safety and health, accessibility for persons with disabilities and special needs, and environmental concerns will be considered.

**5. SCHEDULE OF EVENTS (STEP I)**

The following Schedule of Events represents the Owner’s best estimate of the schedule that will be followed. All times indicated are prevailing times in Atlanta, Georgia. The Owner reserves the right to adjust the schedule as the Owner deems necessary.

<b>STEP I (RFQ) Estimated Time Line</b>		
a. Owner issues public advertisement of <b>RFQ</b>	08/15/19	----
b. Deadline for written questions/requests for clarification (see Section 6).	08/30/19	2:00pm
c. Deadline for submission of Statements of Qualifications	09/05/19	2:00pm
e. Owner completes evaluation, post results, and issues notification to finalist firms	09/12/19	----
	- 09/17/19	----

## 6. SUBMITTAL OF QUESTIONS AND REQUESTS FOR CLARIFICATION

It is the responsibility of each respondent to examine the entire RFQ, seek clarification in writing, and review its submittal for accuracy before submitting the document. Once the submittal deadline has passed, all submissions will be final. The Owner will not request clarification from individual proposer regarding their submission, but reserves the right to ask for additional information from all parties who have submitted qualifications. Questions about any aspect of the RFQ, or the project, shall be submitted in writing via e-mail to:

Scott Jones AVP  
Design & Construction  
Georgia Institute of Technology  
**dsj@gatech.edu**  
*phone calls will not receive a response*

**The deadline for submission of questions relating to the RFQ is the time and date shown in the *Schedule of Events (Section 5)*. All relevant questions and requests for clarification received by the Institution in writing, prior to the deadline will be compiled, and answers will be posted on the Georgia Procurement Registry as an addendum to the original solicitation for services at <http://ssl.doas.state.ga.us/PRSapp/>. Any proposer exceptions to the RFP requirements or requests for proposal deadline extensions must include the reason(s) for such a request. The Owner reserves the right to approve or reject such requests as the Owner deems necessary.**

## 7. INSTRUCTIONS FOR PREPARING STATEMENTS OF QUALIFICATIONS

Interested firms shall submit/upload one (1) electronic copy in .pdf format of the complete qualifications package to a BOR ftp site. Submittals must be prepared in a manner that fits a standard 8 ½" x 11" paper format when printed. Responses are limited to using a minimum of an 11-point font. **The entire response shall not exceed 50 pages, including exhibits, affidavits or other enclosure information that may be included in an appendix.** All pages count regardless of content. Submittals that include qualifications of more than one firm shall not exceed page limits. Submittals that exceed the page limit will be deemed non-responsive and will not be considered by the Selection Committee.

Emphasis should be on completeness, relevance, and clarity to content. The content of all Statement of Qualifications must be categorized and numbered as outlined below, and responsive to all requested information.

### **STATEMENT OF QUALIFICATIONS (DELIVERABLES "A", "B" and "C" FOR ALL FIRMS)**

#### **A. Description and Resources of Firm**

- A1 Provide basic company information: Company's legal name, address, name of primary contact, telephone number, fax number, email address, and company website (if available). If the firm has multiple offices, the qualification statement shall include information about the parent company and branch office separately. Identify office from which project will be managed and this office's proximity to the project site. If applicable, indicate the year the local office was established and the number of persons staffing that office and their disciplines. Provide form of ownership, including state of residency or incorporation, and number of years in business. Is the offeror a sole proprietorship, partnership, corporation, Limited Liability Corporation (LLC), or other structure?

- A2 Briefly describe the history and growth of your firm(s). Provide general information about the firm's personnel resources, including disciplines and numbers of employees and locations and staffing of offices.
- A3 Has the firm been involved in any litigation in the past five (5) years? Describe your experience with litigation with Owners and/or Contractors. List any active or pending litigation and explain. List any claims against your firm or against Owners where your firm is named.
- A4 Provide the name of the insurance carrier, types of coverage and deductible amounts per claim.
- A5 List the firm's annual revenue for the past 5 years. List the parent office and the local office revenues separately, if applicable.
- A6 Supply financial references and main banking references.
- A7 Has the firm ever been removed from a Program Management services contract or failed to complete a contract as assigned? If yes, provide an explanation.
- A8 Complete and submit the Certification Form (Exhibit "A" provided with RFQ) and provide a scanned notarized copy with response with the firm's Statement of Qualifications.
- A9 Complete and submit a Certificate of Insurance and Minority Status Form (Exhibit "B" provided with RFQ) and provide a scanned notarized copy with response with the firm's Statement of Qualifications.
- A10 Complete and submit the Project Team Composition Form, including subconsultants (Exhibit "C" provided with RFQ). This is to identify composition of the project team only. More detailed information about the consulting team members and relevant project experience will be requested in Step II, Request for Proposals (RFP).
- A11 Complete the Contractor Affidavit Form (Exhibit "E" provided with RFQ) and provide a scanned notarized copy with response with the firm's Statement of Qualifications in compliance with the Georgia Security and Immigration Compliance Act.
- A12 Complete the Proposer's Disclosure Statement (Exhibit "F" provided with RFQ) and include with firm's Statement of Qualifications.

#### **GEORGIA SECURITY AND IMMIGRATION COMPLIANCE ACT AFFIDAVIT(S)**

"Contractor" in the following Affidavits shall mean "General Contractor"/ "Contractor" for the purpose of compliance with O.C.G.A. § 13-10-91, (b).

For the purpose of completing the attached Affidavits, please insert the following:

- "Name of Public Employer" shall mean "Georgia Institute of Technology."
- "Name of Project" shall mean "J-348 Expansion of Tech Square, Phase III"

#### **B. Experience and Qualifications**

- B1 Provide professional qualifications and description of experience for principal consulting personnel. *(At this stage, firms are asked for information on lead staff only, but may list qualifications and experience on more than one lead individual who is qualified and available for proposed project. If the firm is selected as a finalist, the Owner will request detailed information on the exact proposed expanded team and their relevant experience during the RFP process.)*
- B2 Provide information on the firm's experience on projects of similar type, size, function, and complexity. Describe no more than five (5) and no less than three (3) projects, in order of most relevant to least relevant, which demonstrate the firm's capabilities to perform the project at hand. For each project, the following information should be provided:
  - a. Project name, location and dates during which services were performed.
  - b. Brief description.
  - c. Services performed by your firm.
  - d. If your firm has more than one office, indicate which office was responsible for each of the example projects.

- e. Respective Owner's stated satisfaction in service of your firm. Provide any Owner-written letters of reference/recommendation about the firm's performance on the project.
- f. Owner's current contact information.
- g. Include key personnel participation in example projects, using a summary matrix similar to Standard Form 330 (Rev. 8/20/16) page 4.
- h. Provide thoughts on what as PM your team feels is most relevant in selection and management of the Owner's Design Professional and how to optimize success through construction delivery.

**C. Statement of Suitability**

- C1 Provide any information that may serve to differentiate the firm from other firms in suitability for the project. Provide evidence of the firm's fit to the project and/or needs of the Owner, any special or unique qualifications for the project; Provide current and projected workloads, the proximity of office to project location, and any services offered by the firm that may be particularly suitable for this project.
- C2 Provide Minority-Owned Business Enterprise (MBE) / Woman-Owned Business Enterprise (WBE) status and M/WBE participation on this project, as well as any non-discrimination and affirmative action policies of the firm. Provide evidence of experience and proficiency with Program Management of public buildings with regard to the areas of public safety, environmental, accessibility for persons with disabilities and special needs or other related concerns.
- C3 Provide information on any special services offered by the firm that may be relevant and available for this project.

**8. SUBMITTAL OF STATEMENTS OF QUALIFICATIONS**

Submit one (1) electronic copy of the complete package in .pdf format onto the BOR / Egnyte ftp site. Uploaded responses (file names) must reference the **RFP No. BOR-J-348-PM, the firm's name, and the word "Qualifications"**.

**(File name Example: BOR-J-348-PM, ABC Company, Qualifications)**

The entire submittal should be submitted as one (1) file. Please do not submit individual documents or sections separately. See the document titled "Upload Instructions" on the Georgia Procurement Registry site along with this RFQ/RFP for detailed instructions regarding the upload of your submittal.

Statements of Qualifications must be received electronically by the Owner prior to the deadline indicated in the Schedule of Events (Section 5 of the RFQ). Printed copies will not be accepted.

If difficulty is encountered during upload, contact Josette Decatur-Hampton at (404) 962-3172 or [Josette.decatour-hampton@usg.edu](mailto:Josette.decatour-hampton@usg.edu) for assistance or confirmation that the file was received. Firms are encouraged to verify their upload was successful at least 45 minutes prior to the deadline.

*(Experience with the ftp site indicates that uploads do not always receive the confirmation statement that the file was successfully uploaded. For files ranging in size over 10mb, it could take more than two minutes to complete the upload.)*

A list of firms submitting responsive Statements of Qualifications will be published on the Georgia Procurement Registry site, as well as the Board of Regents' Office of Real Estate and Facilities' website at [http://www.usg.edu/facilities/external\\_partners/consultant\\_selections](http://www.usg.edu/facilities/external_partners/consultant_selections).

It is the sole responsibility of the Proposer to assure delivery by the specified deadlines; the Owner cannot accept responsibility for incorrect delivery, regardless of reason. No submittals will be accepted after the time stipulated above. Submittals will not be accepted via facsimile or fax.

Proposers are further reminded to include a completed CONTRACTOR AFFIDAVIT UNDER O.C.G.A. §13-10-91 (b)(1) with the Statement of Qualifications (See Exhibit "E"). FAILURE TO PROVIDE THIS AFFIDAVIT WILL RESULT IN REJECTION OF PROPOSAL.

All expenses for preparing and submitting responses are the sole cost of the party submitting the response. The Owner is not obligated to any party to reimburse such expenses. All submittals upon receipt become the property of the Owner. Labeling information provided in submittals "proprietary" or "confidential" or any other designation of restricted use will not protect the information from public view. Subject to the provisions of the Open Records Act, the details of the proposal documents will remain confidential until final award.

## **9. FINALIST NOTIFICATION**

Once the Selection Committee has completed the evaluation of the Statements of Qualifications, a list of the finalist firms will be posted on the Georgia Procurement Registry as an addendum to the original RFQ solicitation, as well as the BOR Office of Real Estate and Facilities website at <http://www.usg.edu/ref/contracts/consultants>.

**Step II - PM Selection** will be initiated by invitation to finalists to submit Program Management Proposals as instructed in the Owner's Request for Proposals (RFP). Finalists will be those firms determined by the Selection Committee to be especially qualified to perform as the Program Manager for this Project in accordance with the qualification criteria herein. The Owner will issue a notice to finalists to participate in an oral presentation/interview. The successful PM will be determined from the interviews and proposals received.



**STEP II**  
**REQUEST FOR PROPOSALS**  
**(From Qualified Finalists)**  
**Program Management Services for**  
**Project No. J-348**  
**“Expansion of Tech Square, Phase III”**  
*Georgia Institute of Technology*  
**Atlanta, Georgia**

**Note: The information in this Section, Step II (Request for Proposals) is provided for firms who have been issued notification as having been deemed eligible and are shortlisted for the project.**

To firms who have been issued notification as having been deemed eligible, the Georgia Institute of Technology (“User”), issues this Request for Proposals (RFP), for those firms to offer proposals for Program Management professional services for the specific project.

**1. CONTRACT INFORMATION**

The contract for Program Management services will be based on the Program Manager Agreement for the Construction Management at-Risk Contract located on the University System of Georgia’s Office of Real Estate and Facilities website: [http://www.usg.edu/facilities/resources/construction\\_management](http://www.usg.edu/facilities/resources/construction_management)

You are encouraged to review and become familiar with the terms and conditions of this contract. BOR does not intend to modify any language contained in general terms and conditions of the contract, and any significant exceptions proposed by a firm could lead to a firm being deemed non-responsive.

**2. PROGRAM**

**See General Project Information in RFQ (Step I), Section 1.**

**3. SCHEDULE OF EVENTS (STEP II)**

The following Schedule of Events represents the Owner’s best estimate of the schedule that will be followed. All times indicated are prevailing times in Atlanta. The Owner reserves the right to adjust the schedule as the Owner deems necessary.

<b>STEP II (RFP) Estimated Time Line</b>		
a. Owner issues notice to finalist firms to propose as instructed in RFP	09/12/19 – 09/17/19	----
b. Owner conducts Mandatory Pre-Proposal Site Visit for finalists	09/19/19	TBD

c. Deadline for submission of written questions and requests for clarification	09/24/19	2:00 PM
d. Deadline for submission of Program Management Team Proposals	10/01/19	2:00 PM
e. Owner interviews finalist firms and Fee Proposals are due	10/07/19	TBA

#### 4. PRE-PROPOSAL SITE VISIT

A pre-proposal site visit will be conducted by the Owner, and attendance of finalist firms is mandatory. The site visitors will convene at an exact date, time and location to be determined and communicated in the Notice to Finalists by the Owner. At the pre-proposal site visit, all finalist firms may be given any relevant available information that has previously been developed, such as programs, studies, preliminary plans, maps, etc. ***The Owner reserves the right to disqualify a proposer from the selection process due to a failure by a proposer to arrive for the site visit by the scheduled time. Failure to attend a mandatory site visit will automatically result in disqualification from the selection process.***

#### 5. SELECTION PROCESS

**Step II - PM Selection**, will be initiated by the invitation to the qualified finalists by the Selection Committee (determined in Step I from evaluation of Statements of Qualifications) to submit **Program Management Team Proposals and Fee Proposals** as instructed in this RFP. Finalist interviews will also be conducted by the Owner. The successful PM will be determined from the evaluation of proposals received and interviews.

##### **Criteria for the Evaluation of Project Proposals:**

15% Factor: Previous Performance and References of the firm including level of quality of the services of the firm to previous customers, customer's statements of that quality, the firm's ability to meet established time requirements, the firm's response to project needs during Design and construction, the Program Management firm's control of schedule, quality and budget. The Owner will use references from stakeholders of the Owner's choosing from previous projects of the finalists, among other information as necessary. This information will be collected by the Selection Committee from project references provided in the RFQ (Step I) submittal.

20% Factor: Program Management Team Qualifications and Experience of the Proposed Project Team. Experience of the principal, lead Program Manager, and project manager on completed projects of similar size, type, and complexity; assigned team's experience with effective budget and schedule control; availability of the proposed team for this project. Provide information regarding percentage of the primary team member's time will be committed to this project.

15% Factor: Quality of Proposed Management Plan: The firm's Program Management and detailed work plans; Firm's approach for managing responsibility and accountability for project concerns; Firm's process for effectively resolving issues and maintaining project commitments.

##### **Criteria for the Evaluation of Finalist Interviews:**

25% Factor: Methodology Presented: The firm's presentation of the proposed program management Plan; and the committee's overall impression of the firm and key team members; firm's approach for managing responsibility and accountability for project



concerns; firm's process for effectively resolving issues and maintaining project commitments.

25% Factor: Team Communications/Project Solutions: The effectiveness in communication of the team members during the interview process, and the firm's ability to effectively answer project questions and provide solutions during the interview.

## 6. SUBMITTAL OF QUESTIONS AND REQUESTS FOR CLARIFICATION

It is the responsibility of each respondent to examine the entire RFP, seek clarification in writing, and review its submittal for accuracy before submitting the document. Once the submittal deadline has passed, all submissions will be final. The Owner will not request clarification from individual respondents relative to their submission, but reserves the right to ask for additional information from all parties who have submitted qualifications. Questions about any aspect of the RFP, or the project, shall be submitted in writing via e-mail to:

Scott Jones AVP  
Design & Construction  
Georgia Institute of Technology  
**dsj@gatech.edu**  
*phone calls will not receive a response*

**The deadline for submission of questions relating to the RFP is the time and date shown in the *Schedule of Events (Section 3)*. All relevant questions and requests for clarification received by the Institution in writing, prior to the deadline will be compiled, and answers will be posted on the Georgia Procurement Registry as an addendum to the original solicitation for services at <http://ssl.doas.state.ga.us/PRSapp>. Any proposer exceptions to the RFP requirements or requests for proposal deadline extensions must include the reason(s) for such a request. The Owner reserves the right to approve or reject such requests as the Owner deems necessary.**

## 7. INSTRUCTIONS FOR PREPARING PROGRAM MANAGEMENT TEAM PROPOSALS

### **READ CAREFULLY - THIS HAS CHANGED!**

Program Management Team Proposals must be prepared in a manner that when printed would typically fit on standard (8 ½ x 11") paper. Proposal responses **should not exceed 40 single pages or 20 double sided** and use a minimum 11-point font. Submittals that include qualifications of more than one firm shall not exceed the page limit. All cover sheets, tabs, table of contents, or other enclosure information required count towards the page limit. All pages count regardless of content. Exhibits A through F do not count against the page limit. Emphasis should be on completeness, relevance, and clarity of content.

To expedite the review of submittals, it is essential that respondents follow the format and instructions outlined below. The content of all Project Proposals must be categorized and numbered as outlined in the following "PROGRAM MANAGEMENT TEAM PROPOSAL DELIVERABLES", and must address in a responsible and responsive manner all requested information:

### **PROGRAM MANAGEMENT TEAM PROPOSAL (DELIVERABLES "D", and "E" FOR FINALIST FIRMS ONLY)**

Emphasis should be on completeness, relevance, and clarity to content. The content of all Statement of Qualifications must be categorized and numbered as outlined below, and responsive to all requested information.

#### **D. Qualifications and Experience of Proposed Program Management Team**

- D1 Describe your firm's proposed organization for the Program Management team, including sub-consultants. Please designate all specific individuals and their roles on your team by submitting an organizational chart for the project: At a minimum, the project organization chart shall show the names of key planners and staff; descriptions of responsibilities for all proposed staff.
- D2 Please provide for each of the above personnel current resumes listing relevant project experience and percentage of the person's time to be committed to this project.
- D3 Please identify the individual who, *from project start to finish*, will be the leader of your team and the principal point of contact between your firm and the BOR and the Using Agency. Provide detailed information on the qualifications of this individual and the direction, authority, and management tools that will be provided to the individual by the firm. This individual's competence, his/her leadership, and his/her ability to achieve *customer satisfaction* will be heavily considered in the selection.
- D4 Provide examples of your team's *recent* experience in similar projects, including the following information:
  - a. Provide detailed information on the three most recent relevant projects your firm has completed with proposed team members working together. Include the total value of the project, dates of the project, quantity of change orders or amendments to the contract and net total cost increase. Summarize the actual schedule performance relative to the initial project schedule. For each project, provide the name of Client's representative (with a current phone number) who is most familiar with your performance on the project. Summarize successes achieved and problems encountered with the project.
  - b. Provide a reference from the Client and any other stakeholders (with current phone numbers) familiar with your performance on each of the above projects.
  - c. List the individuals who served as the Principal Program Management point person, and other key roles on the projects. Please note whether these individuals are still employed with your firm. Identify and provide detailed information on projects in which all or any combination of members of the proposed team has worked together on.
  - d. Provide detail information on the level of experience team members have with the design of facilities similar to this project; include the project name and project type. To the degree applicable to this type project.

#### **E. Management plan**

- E1 Provide a statement of your definition of your firm's proposed overall role in this project, your anticipated level of management responsibility and accountability for project concerns. Describe your process for efficiently resolving issues and maintaining the project commitments while working collaboratively with the BOR, Using Agency, and others as applicable. Provide detailed procedures for routine solving of complex project issues without compromising your team commitments. Provide your proposed methods and plans of communication.
- E2 Provide your proposed timeline covering the scope of work and a detailed work plan for the project. Each milestone must include the detailed steps describing the tasks to be done. Describe systems and procedures your firm uses to manage the project schedule. Describe alternatives that may be explored to shorten the schedule.
- E3 Provide your detailed plan for applying any services not specifically mentioned herein. Explain the relevance of these services to this project and how they benefit the project.
- E4 Provide your detailed plan for applying any services not specifically mentioned herein. Explain the relevance of these services to this project and how they benefit the project.

## 8. SUBMITTAL OF PROGRAM MANAGEMENT TEAM PROPOSALS

Submit one (1) electronic copy of the complete package in .pdf format onto the BOR / Egnyte ftp site. Uploaded responses (file names) must reference the **RFP No. BOR-J-348-PM, the firm's name, and the words "Proposals"**.

**(File name Example: BOR-J-348-PM, ABC Company, Proposals)**

The entire submittal should be submitted as one (1) file. Please do not submit individual documents or sections separately. See the document titled "Upload Instructions" on the Georgia Procurement Registry site along with this RFQ/RFP for detailed instructions regarding the upload of your submittal.

Program Management Team Proposals must be received electronically by the Owner prior to the deadline indicated in the Schedule of Events (Section 3 of the RFP). Printed copies will not be accepted.

If difficulty is encountered during upload, contact Josette Decatur-Hampton at (404) 962-3172 or [josette.decatdur-hampton@usg.edu](mailto:josette.decatdur-hampton@usg.edu) or confirmation that the file was received. Firms are encouraged to verify their upload was successful at least 45 minutes prior to the deadline.

*(Experience with the ftp site indicates that uploads do not always receive the confirmation statement that the file was successfully uploaded. For files ranging in size over 10mb, it could take more than two minutes to complete the upload.)*

It is the sole responsibility of the Proposer to assure delivery by the specified deadlines; the Owner cannot accept responsibility for incorrect delivery, regardless of reason. No Program Management Team Proposals will be accepted after the time stipulated above. Submittals will not be accepted via facsimile or fax.

All expenses for preparing and submitting responses are the sole cost of the party submitting the response. The Owner is not obligated to any party to reimburse such expenses. All submittals upon receipt become the property of the Owner. Labeling information provided in submittals "proprietary" or "confidential" or any other designation of restricted use will not protect the information from public view. Subject to the provisions of the Open Records Act, the details of the proposal documents will remain confidential until final award.

## 9. PRESENTATION/ INTERVIEW INFORMATION

### Interview Format

Firms selected to make presentations shall be notified by the Invitation to Interview letter issued by the Selection Committee Manager. The Invitation to Interview letter shall designate a place and time for the interview session. The time allotted to each firm to present and be interviewed will be in accordance with the State Construction Manual. The Invitation letter will specify the manner in which the presentations will be conducted.

- The interview will last a total of 55 minutes (5 minutes for setup, 25 minutes for the presentation, 20 minutes reserved for questions and answers and the last 5 minutes for knock down). The Selection Committee will consist of representatives of the institution.
- Electronic presentations, such as PowerPoint presentations are also allowed.

- BOR will typically have a screen and projector available in the interview room, and possibly a laptop computer. Nevertheless, presenters must be prepared with their own flash drive and laptop computer in case unforeseen technical difficulties are encountered.
- The presentation may involve flip charts or boards along with the oral presentation.
- All members of the Selection Committee will be present during all of the presentations and interviews.
- Firms are not allowed to address any questions, prior to the interview, to anyone other than the designated contact.

### **Interview Requirements**

The primary intent of the formal interview process is to provide the Selection Committee with in-depth and clarifying information about the firm. Information provided should assist the Selection Committee in making an informed decision as to the proposer best suited for the work.

Teams should focus their presentations on:

- Describing their detailed plan for managing the project; including cost, schedule, and quality and
- Unique characteristics or services the team offers
- Specific roles of your team members

Firms are discouraged from reviewing general company history and past experience as submitted in Statements of Qualifications or Project Proposals unless this information is particularly relevant to the presentation. All key personnel should be present at the interview to discuss how the team will successfully complete the project.

## **10. SUBMITTAL OF FEE PROPOSALS**

Fee Proposals will be solicited from the finalists invited to interview. Fee proposals shall be submitted at the conclusion of the interview session in a sealed opaque envelope and shall not include any project proposal information. **Firms must use “Program Management Fee Proposal” form (included as an Exhibit D to this RFQ/RFP).** No sealed fee proposal will be opened until one firm has been judged to be the top ranked firm. Subsequently, only the fee proposal from that top ranked firm will be opened. Please understand that this proposal constitutes a starting point for negotiation toward an eventual agreement on fees.

### **Final Selection**

Upon completion of the evaluation and interview process by the Selection Committee, the firms will be ranked in descending order of recommendation. Negotiations will then be initiated with the best-qualified firm to finalize the terms and conditions of the contract. In the event a satisfactory fee agreement cannot be reached with the highest ranking firm, the Owner will formally terminate the negotiations in writing and enter into negotiations in turn with the second highest ranking firm and so on until a mutual agreement is established and the Owner awards an architectural services contract. Refer to the BOR website for the most current version of Program Manager Contract Between Program Manager and Owner for Construction Management projects: [http://www.usg.edu/facilities/resources/construction\\_management](http://www.usg.edu/facilities/resources/construction_management)

## **11. ADDITIONAL TERMS AND CONDITIONS**

### **Deadlines**

The deadline for submission of questions relative to the RFP is the time and date shown in the Schedule of Events (Section 3). All relevant and significant questions that have been submitted in writing prior to the deadline will be compiled and answered in writing, and issued directly to all

proposers via E-mail. Any proposer exceptions to the RFP requirements or requests for deadline extensions must also be communicated to the Owner by the deadline to be properly considered. Any requests for proposal deadline extensions must include the reason(s) for such a request. The Owner reserves the right to approve or reject such requests as the Owner deems necessary.

### **Restriction of Communication**

From the issue date of this (RFP/RFQ) solicitation until a successful proposer is selected and the selection is announced, proposers are not allowed to communicate about this solicitation or this Project for any reason with any members of the Selection Committee, the Institution, or BOR, except for submission of questions as instructed in the RFQ, or during the proposer's conference (if applicable), or as provided by any existing work agreement(s). For violation of this provision, the Owner reserves the right to reject the proposal of the offending proposer.

### **Submittal Costs and Confidentiality**

All expenses for preparing and submitting responses are the sole cost of the party submitting the response. The Owner is not obligated to any party to reimburse such expenses. All submittals upon receipt become the property of the Owner. Labeling information provided in submittals "proprietary" or "confidential", or any other designation of restricted use will not protect the information from public view. Subject to the provisions of the Open Records Act, the details of the proposal documents will remain confidential until final award.

### **Award Conditions**

This request is not an offer to contract or a solicitation of bids. This request and any statement of qualifications or proposal submitted in response, regardless of whether the proposal is determined to be the best proposal, is not binding upon the Owner and does not obligate the Owner to procure or contract for any services. Neither the Owner nor any party submitting a response will be bound unless and until a written contract mutually accepted by both parties is negotiated as to its terms and conditions and is signed by the Owner and a party containing such terms and conditions as are negotiated between those parties. The Owner reserves the right to waive non-compliance with any requirements of this Request for Proposal and to reject any or all proposals submitted in responses. Upon receipt and review of responses, the Owner will determine the party(s) and proposal that in the sole judgment of the Owner is in the best interest of the Owner (if any is so determined), with respect to the evaluation criteria stated herein. The Owner then intends to conduct negotiations with such party(s) to determine if a mutually acceptable contract may be reached.

### **Reciprocal Preference Law**

For the purposes of evaluation only, a proposer that resides in the State of Georgia will be granted the same preference over proposers that reside in another State in the same manner, on the same basis, and to the same extent that preference is granted in awarding bids for the same goods or services by such other State to proposers that reside therein. For the purposes of this law, the definition of a resident proposer is one who maintains a place of business with at least one employee inside the State of Georgia. A P.O. Box address will not satisfy this requirement.

### **Joint-Venture Proposals**

The Owner does not desire to enter into "joint-venture" agreements with multiple firms. In the event two or more firms desire to "team up" it is strongly recommended that one incorporated firm propose and maintain status as the contracted lead firm with the remaining firms participating as major consultants to the lead firm.

### **Minority and Small Business Enterprise**

It is the policy of the State of Georgia that minority-owned business enterprises (MBE), woman-owned business enterprises (WBE) and small business enterprises (SBE), have a fair and equal opportunity to participate in the State purchasing process. Therefore, the Owner encourages all

MBE, WBE and SBE to compete for contracts to provide goods, services, and construction, and encourages contractors to solicit MBE, WBE and SBE in procuring subcontractors and suppliers. This desire on the part of the Owner is not intended to restrict or limit competitive bidding or to increase the cost of the work. The Owner supports a healthy free market system that seeks to include responsible businesses and provides ample opportunity for business growth and development. Contractors and subcontractors who utilize qualified minority subcontractors may qualify for a Georgia state income tax credits for qualified payments made to minority subcontractors. See Official Code of Georgia Annotated (O.C.G.A.) O.C.G.A. Section 48-7-38. For more information, please contact:

The Governor's Entrepreneur and Small Business Office  
75 Fifth Street, Suite 825  
Atlanta, Georgia 30308  
Phone: 404-962-4071  
<http://www.georgia.org/Business/SmallBusiness/>

### **Statement of Agreement**

With submission of a proposal, the Proposer agrees that he/she has carefully examined the Request for Qualifications (RFQ), and the Proposer agrees that it is the Proposer's responsibility to request clarification on any issues in any section of the RFQ with which the Proposer disagrees or needs clarified. The Proposer also understands that failure to mention these items in the proposal will be interpreted to mean that the Proposer is in full agreement with the terms, conditions, specifications and requirements in the therein.