



International Boundary and Water Commission
United States and Mexico
United States Section

**Proposal Guidance for Construction
Management Services**

June 16, 2023

International Boundary and Water Commission
United States Section
Construction Management Division
El Paso, Texas

International Boundary and Water Commission

Established in 1889, the International Boundary and Water Commission (IBWC) has responsibility for applying the boundary and water treaties between the United States and Mexico and settling differences that may arise in their application. The IBWC is an international body composed of the United States Section and the Mexican Section, each headed by an Engineer-Commissioner appointed by their respective president. Each Section is administered independently of the other. The United States Section of the International Boundary and Water Commission (USIBWC) is a federal government agency and is headquartered in El Paso, Texas. The IBWC operates under the foreign policy guidance of the Department of State. The Mexican Section is under the administrative supervision of the Mexican Ministry of Foreign Affairs and is headquartered in Ciudad Juarez, Chihuahua, Mexico.

Vision

To be recognized as the premier agency that identifies solutions along the United States - Mexico border through local, state, federal, and binational partnerships.

Mission

Provide binational solutions to issues that arise during the application of United States - Mexico treaties regarding boundary demarcation, national ownership of waters, sanitation, water quality, and flood control in the border region that arise during application of United States-Mexico treaties.

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International Boundary and Water Commission
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Proposal Guidance for Construction Management Services

June 16, 2023

by

Construction Management Division
El Paso, Texas



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Proposal Guidance for Construction Management Services

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1 INTRODUCTION

1.1. PURPOSE

- 1.1.A. This document is meant to provide guidance on the required proposals to both help Contractors provide better documents and to help USIBWC receive proposals that are easier to evaluate.
- 1.1.B. More than anything, the guidance herein is meant to detail the information that we need in order to judge whether your proposal meets the Scope of Work (SOW). The easier it is for us to find the required information, the more likely it is that your company will be found to have met the minimum requirements.
- 1.1.C. Many details are provided in the Construction Management (CM) Services SOW under '*Proposals and Task Order Evaluation Criteria.*' Failure to follow this guidance can cause a lower rating during review of your proposal. Please note that the SOW requirements always govern over this document.

1.2. IDIQ CONTRACT PROPOSAL REQUIREMENTS

- 1.2.A. The IDIQ Contracts require that proposals for each Task Order include the following information:
1. Volume I shall at the minimum address:
 - a. Qualifications/Evaluation Criteria
 - (1) Professional qualifications necessary for satisfactory performance of required services;
 - (2) Specialized experience and technical competence in the type of work required;
 - (3) Capacity to accomplish the work in the required time;
 - (4) Past performance on contracts with the Government agencies and private industry in terms of cost control, quality of work, and compliance with performance schedules;
 - (5) Location in the general geographical area of the project and knowledge of the locality of the project; and
 - (6) Acceptability under other appropriate evaluation criteria (as defined in the Request for Task Order Proposal).
 - b. Technical Understanding
 - c. Proposal schedule for completing the Task Order
 - d. Other information requested in the Request for Task Order Proposal
 2. Volume II shall at a minimum address:
 - a. Detailed cost/price proposal in accordance with the instructions set forth in the RFP and if applicable, FAR 15.403-5 and Table 15-2. Task Orders shall be Firm Fixed Price (FFP).
 - b. Rational for the proposed price.



- 1.2.B. Failure of the Contractor to address items 1.2.A.1.a.(1) through 1.2.A.1.d. in their proposals is detrimental and may cause them to be considered nonresponsive to the Request for Proposal.
- 1.2.C. Specifics on how each Volume I requirement will be evaluated as well as the relative importance of each requirement are detailed in the SOW under '*Proposals and Task Order Evaluation Criteria.*'
- 1.2.D. Volume II is the cost/price proposal. This document does not provide guidance on submitting that volume.



2 GENERAL GUIDANCE

2.1. GENERAL COMMENTS

- 2.1.A. Download all the construction solicitation documents from sam.gov and review the key documents to fully understand the project requirements. Keep track of all solicitation amendments as they sometimes include key changes or additions to the scope of the construction project.
- 2.1.B. Offerors shall only submit material that is directly pertinent to the requirements of this Solicitation. Carefully read each SOW. They are each customized to the specific project requirements. Failure to read the SOW results in providing proposals that address items from previous projects.
- 2.1.C. Do not include the SOW in your proposal. Do not copy or repeat the SOW or construction specifications verbatim. Additionally do not re-list the SOW CM tasks rephrased as though your company will perform each required item. This does not demonstrate your technical understanding of the SOW.
- 2.1.D. Do not include SF-330 pages in your proposal. This is a narrative type proposal and should not include SF-330 forms. See Subsection 2.4. for more details.
- 2.1.E. Tailor your proposed personnel and your proposal to the tasks in this SOW. For example if the SOW and the construction contract note extensive vegetative work, do not highlight work with animals.
- 2.1.F. Do not provide general statements such as "we have worked for many federal agencies" or "we have completed many similar projects" without also providing the supporting data. For example don't say "We have a large local office for backup personnel;" instead state "Our local office is comprised of 12 engineers, 3 surveyors, and 4 administrative support personnel who are all available to pitch in and help on this project if the need arises."
- 2.1.G. Illustrations shall be used wherever practical to depict organizations, systems and layout, implementation schedules, plans, etc. Ensure that any graphics/images used are legible. Many times there are schedules or other charts shown, but the words are too small or fuzzy to read.
- 2.1.H. Only provide 8.5" x 11" (preferred) or 11"x17" sized pages within your proposal. A page sized at 13.08"x16.92" or other oddball sizes are not appropriate.
- 2.1.I. We are not TxDOT, USACE, nor any other federal agency. If you are providing evidence of certifications provided by other agencies, explain what they represent and why they are applicable to USIBWC's work.
- 2.1.J. Do not provide lengthy, unnecessary information in your proposal or descriptive information about past projects that add no benefit to show how your firm or project team meet the requirements of the SOW. Examples include a past project's background or discussing aspects of the projects that are unrelated to the work to be performed under this SOW.



- 2.1.K. Information shall be consistent and logically presented. Only duplicate information if absolutely required. Avoid unnecessary repetition. Do not say the same thing multiple times.
 - 1. Especially when stating how the proposed personnel meet the SOW, do not repeat the same facts or details in three different sections. This makes reviewing the complete description of an individual's qualifications very difficult and details may be missed. You may summarize key points in your introduction but keep all qualifications and experience in one section.
- 2.1.L. Keep the organization of your proposal simple and avoid having needless appendices when the content can be included within the proposal. The easiest proposals to review are those that follow the same structure or outline of the contents list for Volume I provided in the SOW.
- 2.1.M. Define all acronyms used in your proposal that are not included in the SOW abbreviations section.
- 2.1.N. If you have a question about the SOW or even about the related construction project, ask the CO.

2.2. CM VS PM

- 2.2.A. All items being discussed in this document revolve around the CM Services SOW. These SOWs refer to the CM or CM Contractor. The CM Contractor is the prime contractor awarded the Task Order. References to CM Contractor cover all required personnel in the CM team from the project manager to the CI, the FEM, and any other people necessary to complete the work required.
- 2.2.B. Many of the proposals that we review seem to indicate that you will have a singular person acting as the "construction manager." Often this construction manager will be the main point of contact and oversee the Task Order. This is confusing because what is being described as a construction manager is really a project manager (PM).
- 2.2.C. We do not require a person to be the construction manager. Your company is the CM, not a person.

2.3. COMMUNICATION

- 2.3.A. Many proposals we receive try to route all project communications through your PM (see Figure 1). This cannot work on a day-to-day basis. USIBWC's primary point of communication will be the construction inspector (CI). In cases where only the field environmental monitor (FEM) is onsite, they become the main point of contact. See Figure 2 for an illustration of how USIBWC views day-to-day communications with the CM Contractor.
- 2.3.B. If the CM Contractor tries to direct all communications through the PM, it will not work. The CI needs to direct contact with the COR to keep them up-to-date on construction activities.

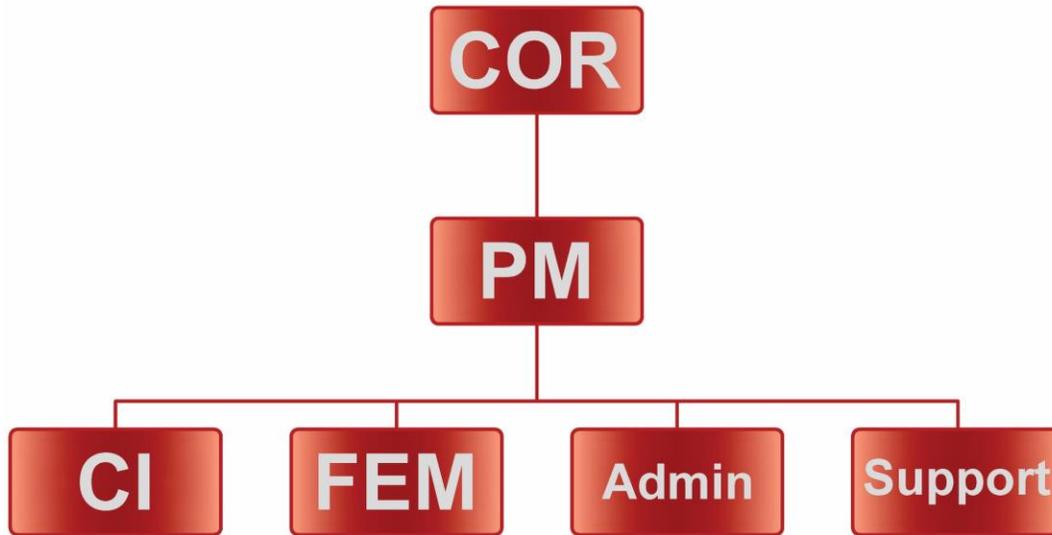


Figure 1 - How CM Contractors Often See Lines of Communication

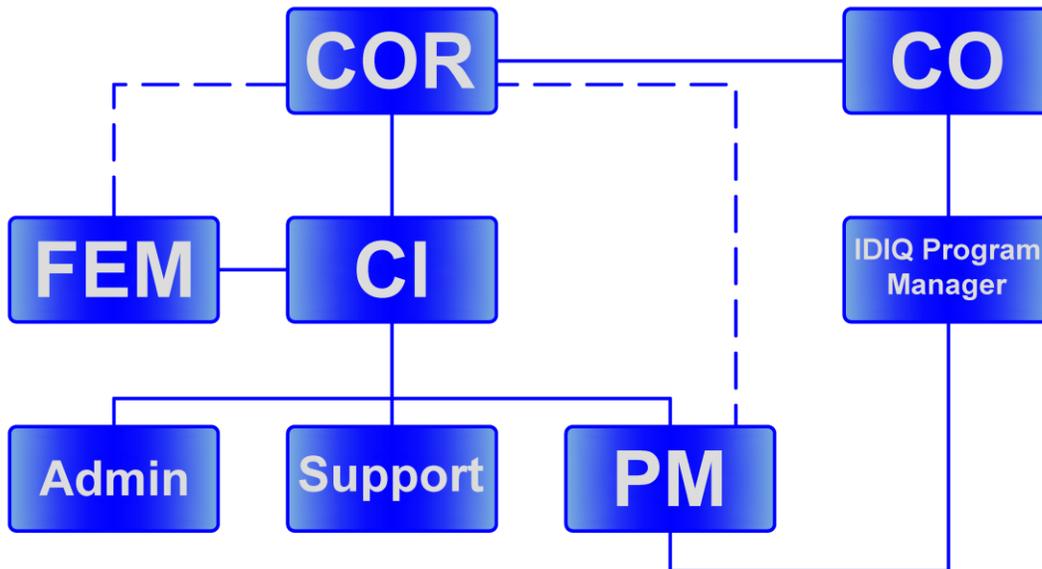


Figure 2 - How USIBWC Sees Lines of Communication

2.4. SF-330 FORMS

2.4.A. While the SF-330 form is used during A/E source selection (i.e. award of the IDIQ Contracts), it should not be used in your proposal. These proposal are a narrative type and should not be limited by the SF-330 forms. If all you provide is limited to SF-330 resumes (SF-330 Section E as shown in Figure 3), you will have failed to provide sufficient information for us to determine if your personnel meet our requirements. Examples of how the SF-330 fails to meet our requirements includes:

1. SF-330 Box 16
We require degree, major, and college. This box only indicates degree and major.



2. SF-330 Box 19(2)
 Year completed offers no benefit nor does it provide any information by which we can evaluate your personnel. We need the dates that they worked the project, not the year it was completed.
3. SF-330 Box 19(3)
 The space allocated in Box 19(3) for a brief description and specific role of each project is simply not large enough. Whether being used to show how an engineer provided oversight on a project or how a FEM performed biological inspections, in order to provide the data required per Paragraph 2.5.A.4. more room is required.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT <i>(Complete one Section E for each key person.)</i>			
12. NAME	13. ROLE IN THIS CONTRACT	14. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
15. FIRM NAME AND LOCATION <i>(City and State)</i>			
16. EDUCATION <i>(Degree and Specialization)</i>		17. CURRENT PROFESSIONAL REGISTRATION <i>(State and Discipline)</i>	
18. OTHER PROFESSIONAL QUALIFICATIONS <i>(Publications, Organizations, Training, Awards, etc.)</i>			
19. RELEVANT PROJECTS			
(1) TITLE AND LOCATION <i>(City and State)</i>		(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
a.	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE		<input type="checkbox"/> Check if project performed with current firm
(1) TITLE AND LOCATION <i>(City and State)</i>		(2) YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION <i>(If applicable)</i>
b.	(3) BRIEF DESCRIPTION <i>(Brief scope, size, cost, etc.)</i> AND SPECIFIC ROLE		<input type="checkbox"/> Check if project performed with current firm

Figure 3 - SF-330 Section E (Resume)

2.5. RESUMES

2.5.A. When providing resumes for the CI, FEM, or key personnel, provide the following information:

1. Name
2. Qualifying educational background, including (if applicable) degree, year obtained, and name of educational institution. This includes required technical training.
3. Qualifying professional license, if applicable, including the state of licensure, discipline, and license number.
4. Qualifying experience covering at least the minimum experience periods required:
 - a. Project name, locations, and dates of assignment (at least month and year).



- b. Description of primary project features including scope and magnitude.
 - c. Name, address, and phone number of project owner.
 - d. Name of employer on each project.
 - e. Position(s) occupied on each assignment.
 - f. Description of duties and responsibilities of each position occupied.
5. Do not include company project descriptions for which the individual has had no participation or has not yet performed any services.
 6. Review details in 3.3. and 3.4. for additional information to show or not show in resumes.
- 2.5.B. Explain in project history why the project shown applies to the work being proposed in the CM Services Solicitation.
- 2.5.C. Only provide resumes for pertinent personnel.
- 2.5.D. **Note:** Although experience outside the United States may be relevant, some countries do not adhere to the same standards and requirements as does the US. As such, this experience may cause doubts about the individual's knowledge of standards and requirements of the US if no other experience is provided within the states. When providing project experience from other countries or overseas, note what standards or codes were followed for the project that are comparable to or exceed US standards.

2.6. STATEMENTS AND ASSUMPTIONS

- 2.6.A. Clearly detail any and all assumptions made.
1. Care shall be taken so that your assumptions do not change the SOW requirements.
 2. Explain the assumptions clearly so they are not viewed that you not understanding the required work.
- 2.6.B. Please note that listing items in your proposal contrary to the SOW will result in a best case of a lower rating during the technical evaluation and in a worst case of your proposal being found to be nonresponsive.
1. For example, a proposal once noted that "The field office shall have at least one standard sized window, comfortably seat three individuals with separate desks, chairs, bookcases, drawing table, appropriate HVAC (depending on seasonal needs), and reproduction equipment (printer with scanner) as well as network connection. The CI and FEM shall have access to the reproduction and scanning equipment for the duration of the services, including access to the network connection for sending and receiving project correspondence. Printer paper, ink, or printer repairs will be provided by others. If printer is down/nonfunctional an alternate/convenient reproduction/scanning process will be provided; if the printer is down for more than 24 hours it will be immediately replaced." This was contrary to the SOW and was seen as a negative during the review of the proposal.



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3 VOLUME I-PROFESSIONAL QUALIFICATIONS

3.1. PROPOSAL REQUIREMENTS

Item 1.2.A.1.a.(1) requires the proposal to provide data to show that the Offeror has the professional qualifications necessary for satisfactory performance of required services. We view this as CI and FEM qualifications.

3.2. PRESENTING YOUR INFORMATION

- 3.2.A. Some Contractors show that their Construction Inspector (CI) or Field Environmental Monitor (FEM) meets the minimum requirements in a table. If you choose to do this, do not simply list all SOW qualification requirements with a checkmark to indicate the proposed individual possesses that experience. Indicate how the requirement is met and then provide sufficient details in the provided resumes to support the statement.
- 3.2.B. For example, a CI is required to have three years of construction inspection experience. Instead of stating the CI has 5+ years of experience, note 1.2 years on XYZ Project, 0.4 years on Acme Project, 1.6 years on ABC Project, etc.
- 3.2.C. Do not make general statements such as "Every project he has worked on has had stormwater protection measures." Since stormwater pollution prevention is required on every project, this is expected plus this statement in no way establishes that the proposed person has experience with stormwater requirements, with stormwater BMPs, etc.
- 3.2.D. We will not judge a resume negatively for gaps in time therefore you do not need to list projects that are not applicable to the construction project and the SOW requirements.

3.3. QUALIFICATIONS FOR CONSTRUCTION INSPECTOR

- 3.3.A. Include the degree held by the proposed CI, including college and year received.
 - 1. The degree study area must match one of those listed in the SOW. If you feel another area may be applicable, ask the CO. Without a change allowed by the CO, only those degrees listed in the SOW will be allowed.
 - 2. Civil engineering technology is not a civil engineering degree.
 - 3. Construction technology and construction management are not construction engineering.
- 3.3.B. If the CI holds a PE, include the state of licensure, license number, and discipline.
 - 1. If the PE is being used in lieu of the CI graduating from an ABET accredited school, ensure that their PE discipline is shown. Also in this situation, the discipline must match one of those listed in the SOW.
- 3.3.C. Provide a detailed job listing to show experience.
 - 1. Job listings shall include position occupied, dates of assignment (at least month and year) and detailed job descriptions indicating how the CI meets the minimum number of years of experience required in the SOW. Simply listing jobs will result in the CI being found to not meet the SOW.



2. Often there are many different experience requirements listed that the CI must meet. Ensure that the data provided clearly shows how your CI meets each of these requirements.
 3. On a project lasting years, or even on a short term complicated project, your CI may fulfill several different positions or requirements. Do not simply list that John Smith worked from 1/2020 to 12/2023 and provided general engineering representation, contract administration, full-time resident engineering, and onsite inspection of structural cast-in-place concrete, precast concrete, and earthwork. A single person could not have performed all of these functions fulltime throughout the life of the project. Breakout what the jobs were and the time spent with each job such as '*John Smith provided general engineering representation (3 months), contract administration (6 months), full-time resident engineering (5 months), and onsite inspection (10 months) of structural cast-in-place concrete (7 months), precast concrete (1 month), and earthwork (9 months).*' Make it easy in your proposal for us to determine whether your CI meets our requirements.
 4. Design experience is just that: experience in performing designs. If a job covered multiple types of design, such as structural and hydraulic, break out the time spent with each design component.
 - a. The only time that reviewing designs is acceptable as design experience is if an engineer is reviewing subordinate's designs in order to place their own stamp on them.
 5. If work on a listed project was less than fulltime, indicate how many hours a week was spent on the project.
 6. Being assigned to a relevant project as PM does not necessarily demonstrate the PM has the required inspection/construction experience on that project.
 7. Do not bulk project descriptions together because they were performed under the same IDIQ contract or the same program. For example, experience on 25 Task Orders for wastewater projects does not provide enough detail to understand how the person's assignment and/or the projects are relevant to the current SOW. Provide individual project descriptions.
- 3.3.D. Avoid overstating an individual's number of years of experience. An individual with many years of experience does not necessarily comply with the requirements of the SOW if the person does not have the minimum number of years of experience in the specified types of construction. For example, a civil engineer with over 30 years of experience may have only worked in the mining industry and would not qualify if the SOW required a minimum of 4 years in building construction.
- 3.3.E. Provide copies of any certifications/trainings required in the SOW. Failure to provide evidence of required certifications will result in the CI being found to not meet the requirements of the SOW.
- 3.3.F. **Note:** We are often asked whether a non-engineer will be acceptable when the SOW requirements note that an engineer is required. Per professional engineering rules in California, Arizona, New Mexico, and Texas the practice of engineering includes the review of construction for the purposes of ensuring compliance with the drawings and



specifications. Therefore inspection of construction under our SOW falls within the practice of engineering.

1. California
Business and Professions Code, Chapter 7, §6701 includes "supervision of construction for the purpose of securing compliance with specifications and design for any such work" as engineering.
2. Arizona
ARS §32-101 B.17. includes "review of construction for conformance with contract documents and designs" as part of engineering practice.
3. New Mexico
Engineering and Surveying Practice Act, NMSA 61-23-3 E. includes "review of construction for the purpose of assuring substantial compliance with drawings and specifications" as engineering and the practice of engineering.
4. Texas
Texas Engineering Practice Act and Rules, Title 6 §1001.003(c)(9) includes "review of the construction or installation of engineered works to monitor compliance with drawings and specifications" as the practice of engineering.

3.4. QUALIFICATIONS FOR FIELD ENVIRONMENTAL MONITOR

- 3.4.A. Include the degree held by the proposed FEM, including college and year received.
While we used the college under the CI's education to determine if it was from an ABET accredited school, we use the college under FEM to clarify ambiguities. For example, we noted that the FEM had to have a degree in biology or wildlife conservation. You submitted someone with a degree in wildlife and natural resources conservation. We will actually try to research the degree issued to determine if there is a significant difference.
- 3.4.B. If the FEM must meet the Secretary of the Interior's Standards and Guidelines minimum education and experience requirements for professionals, clearly show how all of these minimum requirements have been met.
- 3.4.C. Provide a detailed job listing to show experience.
 1. Job listings shall include dates (at least month and year) and detailed job descriptions indicating how the FEM meets the minimum number of years of experience required in the SOW. Simply listing jobs will result in the FEM being found to not meet the SOW.
 2. Often there are many different experience requirements listed that the FEM must meet. Ensure that the data provided shows how your FEM meets each of these requirements. Simply listing all SOW qualification requirements for the FEM with a checkmark to indicate the proposed individual possesses that experience is not sufficient.
 3. Similarly to the CI resumes, if work included multiple features or disciplines, break out how much work was spent with each.
 4. If work on a listed project was less than fulltime, indicate how many hours a week was spent on the project.



- 3.4.D. Provide copies of any certifications/trainings required in the SOW. Failure to provide evidence of required certifications will result in the FEM being found to not meet the requirements of the SOW.
- 3.4.E. Explain FEM's knowledge and experience showing how it meets the requirements of the SOW.
- 3.4.F. Specifically note how your FEM is familiar with the project area or similar environs as well as has knowledge of wildlife species (common, special status, endangered, threatened, etc.) near the project area.
- 3.4.G. Include references from industry or government for previous monitoring duties. Written references are acceptable. If contact information for a reference is being provided, it is preferred that email addresses be provided, otherwise provide written recommendations or phone numbers of the references. If references are not provided, your FEM will be found to not meet the requirements of the SOW.
 1. Only provide references from USIBWC employees if absolutely necessary. USIBWC personnel are contacted whenever a past USIBWC project is listed, therefore, including a USIBWC reference is redundant. If an individual has no other qualifying experience, a USIBWC reference will be accepted.
- 3.4.H. For reference, Secretary of the Interior's Professional Qualifications Standards are detailed at www.nps.gov/articles/sec-standards-prof-quals.htm. They are also provided below.

In the following definitions, a year of full-time professional experience need not consist of a continuous year of full-time work but may be made up of discontinuous periods of full-time or part-time work adding up to the equivalent of a year of full-time experience.

History. The minimum professional qualifications in history are a graduate degree in history or closely related field; or a bachelor's degree in history or closely related field plus one of the following:

- (1) At least two years of full-time experience in research, writing, teaching, interpretation or other demonstrable professional activity with an academic institution, historical organization or agency, museum, or other professional institution; or*
- (2) Substantial contribution through research and publication to the body of scholarly knowledge in the field of history.*

Archeology. The minimum professional qualifications in archeology are a graduate degree in archeology, anthropology, or closely related field plus:

- (1) At least one year of fulltime professional experience or equivalent specialized training in archeological research, administration or management;*
- (2) At least four months of supervised field and analytic experience in general North American archeology; and*
- (3) Demonstrated ability to carry research to completion.*

In addition, to these minimum qualifications, a professional in prehistoric archeology shall have at least one year of fulltime professional experience at a



supervisory level in the study of archeological resources of the prehistoric period. A professional in historic archeology shall have at least one year of fulltime professional experience at a supervisory level in the study of archeological resources of the historic period.

Architectural history. The minimum professional qualifications in architectural history are a graduate degree in architectural history, art history, historic preservation, or closely related field, with coursework in American architectural history; or a bachelor's degree in architectural history, art history, historic preservation, or closely related field plus one of the following:

- (1) At least two years of fulltime experience in research, writing, or teaching in American architectural history or restoration architecture with an academic institution, historical organization or agency, museum, or other professional institution; or*
- (2) Substantial contribution through research and publication to the body of scholarly knowledge in the field of American architectural history.*

Architecture. The minimum professional qualifications in architecture are a professional degree in architecture plus at least two years of fulltime professional experience in architecture; or a State license to practice architecture.

Historic Architecture. The minimum professional qualifications in historic architecture are a professional degree in architecture or State license to practice architecture, plus one of the following:

- (1) At least one year of graduate study in architectural preservation, American architectural history, preservation planning, or closely related field; or*
- (2) At least one year of fulltime professional experience on historic preservation projects. Such graduate study or experience shall include detailed investigations of historic structures, preparation of historic structures research reports, and preparation of plans and specification for preservation projects.*

3.5. CO OR FEM THAT DOES NOT MEET MINIMUM QUALIFICATIONS

- 3.5.A. It is always up to the CM Contractor to determine their best personnel to submit for any project. Sometimes, the best personnel simply do not meet USIBWC's minimum requirements.
- 3.5.B. Task order evaluations do not involve scores or points. An Offeror's proposal is compared against the Scope of Work criteria and either does not meet, meets, or exceeds minimum requirements. Usually the Offeror that overall meets and/or exceeds most factors is considered the most highly qualified. However, there may be only one Offeror or Offeror's may be well matched in what they have provided in their proposals and in those situations having someone who is a good fit for the project but does not meet all of the minimum requirements may be seen as more beneficial to USIBWC than someone else.
- 3.5.C. This issue is being brought up to simply highlight that proposing personnel that do not meet the minimum requirements is not instant rejection of an Offeror's proposal.



3.6. SUBCONTRACTED CI OR FEM

- 3.6.A. Note that although proposing a subcontracted CI is not excluded in the SOW, a qualified CI employed by a subcontractor is generally viewed as less advantageous versus a qualified CI employed by the prime contractor and may result in a lower evaluation.
- 3.6.B. The CI is the most critical role on the CM team. Subcontracted CIs are not directly supervised by the prime thus the prime may be unfamiliar with the quality of the services provided by the CI which is viewed as a disadvantage.
- 3.6.C. Take the time in your proposal to show how working with a subcontractor as part of your team will not limit communications nor fragment the team.
 - 1. Ensure that you show how communication with a subcontracted CI will be accomplished. Review Paragraph 2.3.A.



4 VOLUME I-SPECIALIZED EXPERIENCE

4.1. PROPOSAL REQUIREMENTS

- 4.1.A. Item 1.2.A.1.a.(2) requires the proposal to provide data on the specialized experience and technical competence in the type of work required.
- 4.1.B. Do not just list lots of projects or give provide general project sheets. Provide details explaining why your projects are related to the USIBWC project and why the experience is relevant. For example, "This project has a concrete wall which was similar to Project X where xx feet of concrete walls were constructed. XYZ Company was responsible for construction inspections of all concrete placements."

4.2. COMPANY EXPERIENCE

- 4.2.A. In addition to your narrative and other details, provide a detailed project listing to show company experience relevant to the type of work required.
1. Project listings shall include dates (at least month and year), magnitude, and detailed descriptions to indicate how the project relates the current SOW. Simply listing projects or project names without description will result in the company found to not meet the evaluation criteria for specialized experience and technical competence in the type of work required.
 2. Identify whether the project was a design-build, design-bid-build, design only, construction only, or CM at risk. Identify the specific role your company had on the project.
 3. Be very clear on dollar amounts shown whether they cover the construction costs or your contract costs. Identify the cost of the contract held by your company. For example, identifying an \$8 million construction project as project experience is misleading if you don't clarify that your company only performed design services or CM Services for a cost of \$700,000.
 4. For projects including design and construction, provide the project duration of each phase separately.
 5. Indicate how the project provides relevant experience to the type of work required under the current SOW. Providing projects that include the same type of services but not for the same type of work does not indicate that the company has the experience required. For example, providing a project description for CM services on a levee project is not relevant if the current SOW requires CM Services on a building project.
 6. When applicable, indicate the quantity of work performed to better describe the scope and complexity of the project. For example, indicate a project included rehabilitation of 8 miles of levee or 15,000 linear feet of sewer line as opposed to just stating the project had rehabilitation of levee or sewer lines.
- 4.2.B. When listing the degrees held by the key personnel, include the college and year received.



- 4.2.C. When listing the PE licenses held by the key personnel, include the state of licensure, license number, and discipline.
- 4.2.D. Provide the role and description of responsibilities or duties under this project for each proposed key team member.



5 VOLUME I-CAPACITY

5.1. PROPOSAL REQUIREMENTS

- 5.1.A. Item 1.2.A.1.a.(3) requires the proposal to provide data on your capacity to accomplish the work in the required time.
- 5.1.B. The capacity to accomplish the work is demonstrated by how the company can adjust to changes in the hours or personnel that may be required for the referenced construction project. This includes describing the number of company personnel available to support the team or replace key personnel if necessary.
- 5.1.C. The capacity to accomplish the work in the required time is usually viewed as the ability of a company to pull from other resources to meet the project requirements in case of shortages on the project. The current CI may come down sick, the construction contractor may be working 60 hour weeks requiring extra personnel to cover the project, or some other situation may arise that requires additional personnel. We do not want to see only one or two people available to perform the required work.



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6 VOLUME I-PAST PERFORMANCE

6.1. PROPOSAL REQUIREMENTS

- 6.1.A. Item 1.2.A.1.a.(4) requires the proposal to provide your past performance on contracts with the Government agencies and private industry in terms of cost control, quality of work, and compliance with performance schedules.
- 6.1.B. An easy way to present your past performance with federal contracts is to compile your CPARS data. Provide CPARS data broken out by total number of ratings for cost control, for quality of work, for compliance with performance schedules along with the ratings received for each item. Table 1 and Figure 4 provide examples of how to show compiled data that quickly provides data that we can evaluate.

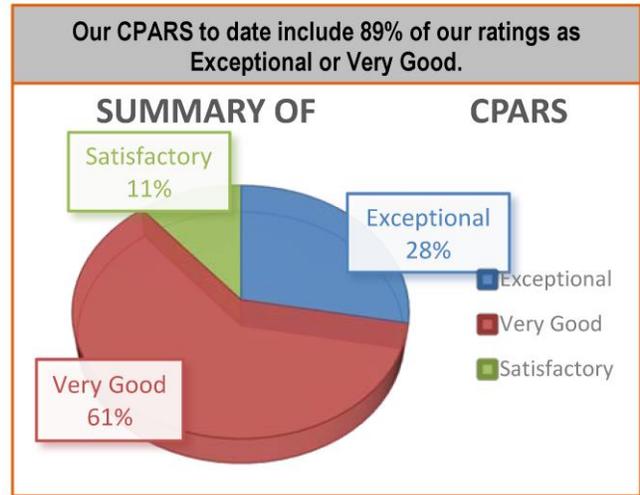


Figure 4 - Example of Past Performance Ratings
 This figure illustrates the distribution of CPARS ratings. The data shows that 61% of ratings are 'Very Good', 28% are 'Exceptional', and 11% are 'Satisfactory'. A summary statement indicates that 89% of all ratings are 'Exceptional or Very Good'.

Table 1 - Example of Past Performance Ratings

Performance Measure	Number of Ratings	Exceptional (%)	Very Good (%)	Satisfactory (%)
Quality	52	17	49	33
Schedule	114	5	36	59
Cost Control	79	21	34	43
Management	82	10	52	38

- 6.1.C. Almost all of the information provided in Figure 5 has no bearing on your past performance. The only relevant data is the first bullet. Do not include non-relevant data.
- 6.1.D. In Figure 5, the second bullet refers to preparing a design schedule and that schedule being the basis for the period of performance. Figure 5 was provided for a construction management task order, not a design task order. The period of performance is set within the CM SOW. Nothing you provide in any schedule is going to change that.
- 6.1.E. While we tend to focus on the federal aspect, we know that much of your work is not federal. For non-federal past performance, you can provide quotes from project owners or their project managers (see Figure 6). You can even provide copies of letters that you received after completion of projects indicating how well you performed the work. Just remember that the evaluation factor is "Past performance on contracts with Government agencies and private industry in terms of cost control, quality of work, and compliance with performance schedules" (emphasis added). Make sure your data addresses these items.



Schedule Compliance. Compliance with schedules is vital in achieving project delivery goals. creates baseline schedules for each project in Primavera Enterprise (P6) that focus on activities and deliverables that are critical to project delivery. The PM works with the technical team to schedule items such as permits, internal and ITR reviews, and equipment delivery to project both study and implementation schedule objectives. The Project Controller prepares regular updates to the schedule, making the updated schedule available via the internet to and client staff who require access. These milestones can be tracked on a daily, weekly or monthly basis depending on the critical nature of the milestone. holds monthly project status meetings to review the data to determine if progress is satisfactory or if corrective action is needed.

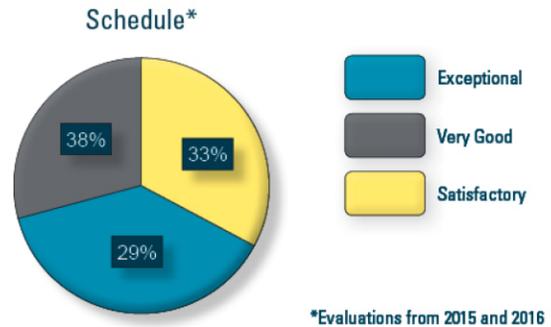


Figure 3: Schedule Compliance Performance

- As shown in the following pie chart, on a total of 60 projects for which CPARs were received in 2015 and (so far) in 2016, all were rated Satisfactory or above in the Schedule Compliance category.
- As requested, has prepared a design schedule with this response which, once agreed with USIBWC, will serve as a basis for design Period of Performance.

Figure 5 - Example of Schedule Compliance Past Performance Ratings

- 6.1.F. Also if you provide quotes, kudos, or letters, make sure that the project data for the applicable project is provided under Professional Qualifications or Specialized Experience.
- 6.1.G. If the Offeror is a joint venture and there is no past performance data for the joint venture, provide past performance data for each member firm individually.
- 6.1.H. Whenever you provide project data indicate whether cost and schedule information relates to your contract or the construction contract.

“I have never seen a team that has worked at such a high level for such a long time to meet deadlines and budget. It was a pleasure to work with this team and it was exhilarating achieving our goals.”

~ Paul Marshall, Acting Office Chief, DWR Flood Risk Assessment and Mitigation Office

Figure 6 - Example of Quote

6.2. PAST USIBWC WORK

6.2.A. FAR 15.305(a)(2)(ii) notes that we shall evaluate past performance information obtained from any source. When you have performed prior CM Services work for USIBWC, whoever is reviewing your proposal will talk to the person that was your COR. They will directly ask about issues, what went wrong, and what went right. They will also ask



about the extent of the project and what your personnel actually covered in the field. Therefore if you state that they did five things on that project, the supporting data must show that they actually performed those five things.

1. Do not say that you ran construction or preconstruction meetings. The CM Contractor does not do that. The COR does.
 2. Do not say that you "processed" Construction Contractor's pay estimates. The CM Contractor has nothing to do with processing any pay estimates; they review pay estimates, but they do not process them.
 3. If you are referencing the FEM, do not mention tasks that the CI performed or vice versa.
 4. Do not expand the construction project's scope.
- 6.2.B. We can easily check what work was performed on past USIBWC projects. Therefore if you say you did XX, YY, and ZZ but we find that you only did WW and XX is raises red flags. It also brings into question the validity of the data shown for projects that we do not have direct information for.
- 6.2.C. If you have received a Deficiency & Omission Report (D&O) on another USIBWC project, especially another CM Services Task Order, address the D&O. Explain what happened and how it was dealt with. Even outline how you have used that D&O to ensure that better work is performed on all of your projects, not just ours. This is critical area in past performance where your opinion matters. Past performance as a whole is data provided by others, but with D&Os you can tell the story. Remember no one is perfect, but it is how we overcome our issues that make us better.



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7 VOLUME I-GEOGRAPHICAL AREA & LOCALITY KNOWLEDGE

7.1. PROPOSAL REQUIREMENTS

- 7.1.A. Item 1.2.A.1.a.(5) requires the proposal to provide data about the location in the general geographical area of the project and knowledge of the locality of the project.
- 7.1.B. Location in the general geographical area of the project is demonstrated by whether the companies have any local resources, personnel, or offices in the geographical area. Knowledge of the locality of the project is demonstrated by how well the CI, FEM, and project team are familiar with the construction project locality.
- 7.1.C. Please note the SOW will state mileage requirements to define the "general geographical area" and "local."



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8 VOLUME I-OTHER APPROPRIATE EVALUATION CRITERIA

8.1. PROPOSAL REQUIREMENTS

- 8.1.A. Item 1.2.A.1.a.(6) requires submittal of data for the CM Contractor acceptability under other appropriate evaluation criteria (as defined in the Request for Task Order Proposal).
- 8.1.B. Per the SOW, this section is linked to Volume I (ii), Technical Understanding. However, the CO may always add items to this elevation item. Be sure to read your Request for Proposal (RFP) in detail. Failure to provide the items noted are detrimental to the review of your proposal.



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9 VOLUME I-TECHNICAL UNDERSTANDING

9.1. PROPOSAL REQUIREMENTS

- 9.1.A. Per the SOW, RFP evaluation criteria 6 is linked to Volume I (ii), Technical Understanding (1.2.A.1.b.). Without undo repetition of previous parts of their proposal, the CM Contractor shall indicate that they fully understand the nature and scope of the construction project to be performed as well as their role within the project as a whole.
- 9.1.B. We are looking to see if you understand the CI and FEM's roles in regards to the construction project as well as the requirements of the construction project itself.
- 9.1.C. Be sure to proof read your proposal. We use templates for our specifications and we know it is easy for items to carry over from your boilerplate into your final document. Keeping items in your proposal from a prior USIBWC project introduces questions about your technical understanding.

9.2. USIBWC REVIEW OF TECHNICAL UNDERSTANDING

- 9.2.A. Below are actual comments that were generated during reviews of prior CM Services proposals. We have been asked by more than one CM Contractor about how we review Technical Understanding. These comments are included to give prospective CM Contractors insight in items that come up during proposal reviews; they are not intended to be requirements to be met.
- 9.2.B. In these comments, contractor names have been replaced with AcMeCtr, personnel names have been replaced with John Smith or Mr. Smith, USIBWC projects have been changed to XYZ, and dates were changed to mm/dd/yyyy.
1. AcMeCtr emphasizes BMPs and SWPPP items more than the main environmental feature of work for vegetation restoration in the QA section on proposal pages 2-7 and 2-8. They discuss concrete and QC testing when neither of these are required on this project and there is no mention of the work for the gabions and reno mattresses. The lack of emphasis shown by AcMeCtr for the main features of work is worrying.
 2. On page 2 under 2.1 Professional Qualifications, AcMeCtr discussed how this project requires a full-time FEM yet the project also has civil engineering components. "AcMeCtr assumes the USIBWC will perform duties that are within the requirements of the construction inspector on other construction management solicitations." They further indicate they will provide support to "supplement the full-time FEM and assist the USIBWC in work typically assigned to the construction inspector." Although AcMeCtr is providing personnel to support the FEM, they are assuming that we will be performing the CI duties typically included in the CM SOW which is a major concern and flawed assumption. The RFP questions and answers provided mm/dd/yyyy included an answer to question 3 that clarified that "the FEM is in essence acting as the construction inspector (CI) on this project ... see Task C.7 a.(3) which states that the FEM will be the project inspector." Further, Task C.7 a.(3)xiii. indicates the various items required for documentation by the FEM on the daily reports which includes typical CI duties.



This item would require correction before AcMeCtr could be found acceptable for this project.

3. AcMeCtr emphasizes the main environmental features of work for vegetation restoration but there is no mention of the work for the gabions and reno mattresses. The lack of emphasis shown by AcMeCtr for the civil features of work is worrying, especially since their past projects with EMD have only included environmental features.
4. AcMeCtr mentions QC testing to be performed and recorded under Task C.7 and Task C.11 but the construction specifications do not require any testing. This leads to question whether AcMeCtr has read the construction documents.
5. AcMeCtr has provided a construction manager, John Smith, under subcontract. He has an environmental background and will support the FEM in addition to other office personnel and the project manager. The construction manager is listed as involved in various tasks of the project. This position is not required in the SOW and may lead to additional costs. If Mr. Smith was intended to support the FEM for the civil aspects of their inspection duties this additional position would be justifiable. However, Mr. Smith has the same background and thereby adds little benefit to duplicate activities performed by other roles.
6. AcMeCtr has typically worked on environmental projects where they performed the construction. The technical approach seems to indicate AcMeCtr is understanding some of the CM tasks from a construction contractor's point of view assuming the tasks apply to their deliverables or their performance instead of inspection of another contractor. Or they are confused on what is included in the task. Examples include:
 - a. Task C.1 discussed the purpose of the pre-construction meeting and construction management meeting to include discussing issues, reviewing plans and specs, and reviewing the QA Plan;
 - b. Task C.3 mentions review of submittals including the CM deliverables for monthly reports, labor interviews, daily reports, and pay estimates;
 - c. Task C.3 Review of Submittals includes RFIs, REAs, claims and proposed modifications, and pay estimates; and
 - d. Task C.4 includes FEM preparation of a base progress schedule and providing monthly updates.There is concern AcMeCtr may not understand the difference between the CM tasks for oversight of construction and their own Task Order deliverables.
7. AcMeCtr has missed the main feature of work with their Project Overview list on page 20. They have bench excavation listed as an item of work, but they never list building the levee. A firm's understanding of the work is questionable when they miss the main feature of work.
8. The project location provided by AcMeCtr is incorrect. This project is located in El Paso County, Texas, not in New Mexico.



9. AcMeCtr notes that their Construction Manager will facilitate day-to-day responses to the COR. This is not acceptable. Day-to-day communication with the COR is with the CI not the project manager.
10. AcMeCtr notes that their construction manager, will "lead communication" with USIBWC. This is not correct. Our main communication will be the CI. That is our first point of contact since they are on the ground with the construction contractor.
11. AcMeCtr may not understand the extent or function of their work for USIBWC since they note that Mr. Smith is "well suited to provide advice for the coordination and synchronization of the Construction Contractor's subcontractors." This is not part of the SOW and is not something that is appropriate for the Government nor a Government Contractor to do. The CM Contractor does not have privity with the Construction Contractor's Contract and therefore has no say in the coordination and synchronization of their subcontractors.
12. Pages 24 and 26 have a statement "Regular contact between AcMeCtr and the USIBWC COR is encouraged to discuss items necessary for the successful progress of the project. Pertinent project progress documentation will be provided to the project stakeholders throughout the duration of the project as agreed to by the USIBWC." AcMeCtr seems to not understand that the COR and FEM will be communicating regularly and the FEM will be providing daily reports. Also there are no stakeholders for this project and the CM Contractor is not to provide project documents to outside entities.
13. I am not sure that AcMeCtr understands the submittal process and their role with a submittal register. AcMeCtr shall maintain "a" submittal register, not "the" submittal register. The statement that submittals "will be rejected expeditiously and returned to the construction contractor for modification." is blatantly incorrect. It also brings into question AcMeCtr's true understanding of the work that they performed on our XYZ project because the submittal process has not changed. The CM Contractor never responds to submittals to the construction contractor. They only respond to the COR.
14. AcMeCtr seems to believe that the design engineer will perform reviews of submittals and that they will be in communication with the designer to maintain the design intent when reviewing RFIs. This is not indicated in the SOW.
15. AcMeCtr mentions QC testing to be performed and includes submittals for the testing laboratory and aggregate/levee testing in their Table 1 preliminary submittal register. The construction specifications for this project do not require any testing and only require aggregate roadway surfacing or levee work in the event the Construction Contractor damages the existing levee. This leads to question whether AcMeCtr has read the construction documents.
16. On page 2-8 AcMeCtr discusses safety but makes no mention of the compliance required with the USACE Health and Safety Manual EM 385-1-1 and OSHA safety regulations. On our XYZ project, both the CI and the FEM lacked knowledge of the EM 385-1-1 during construction. The past performance and this proposal seem to indicate that AcMeCtr may not understand these safety requirements and they are not emphasized to their subcontractors.



17. Task C.4 Progress Schedule Review mentions review of the monthly pay requests as part of the monthly report. Pay estimate reviews are separate from the monthly reports. Monthly reports are provided to document CM and construction progress per SOW Task C.2 while pay estimate reviews are part of SOW Task C.9. AcMeCtr needs to review the CM tasks to ensure they understand what is included under each.
18. On page 2-6 the sentence "We work with the contractor to resolve any technical issues quickly." is not quite correct. The CM Contractor will work with the COR to resolve any issues with the schedule, not the construction contractor. The schedule is a submittal that goes through the COR for review and compliance confirmation.
19. Project stakeholders are not involved with any aspect of this work but AcMeCtr seems to think that they require data and updates. The schedule is also not intended to be used as a management tool for project stakeholders.
20. AcMeCtr mentions scheduling inspection and environmental monitoring based upon the construction schedule. This CM Services Task Order requires 100% construction inspection and environmental monitoring.
21. AcMeCtr needs to read Technical Specifications Section 01.32.16 especially 2.3 and 2.4 since they do not understand that look ahead schedules are reviewed at each progress meeting and that progress schedule updates are provided by the Construction Contractor with each pay estimate which is when the CM Contractor reviews them (SOW C.4 a.(2)).
22. AcMeCtr seems unclear on USIBWC's RFI process because the CM Contractor is not the focal point for RFI processing. Additionally, per SOW C.5. b., all RFIs provided to the CM Contractor shall be reviewed not just those that AcMeCtr deems "appropriate."
23. AcMeCtr does not seem to understand that the CM Contractor only has two business days to perform RFI reviews.
24. The RFI process shown by AcMeCtr on page 25 does not meet USIBWC requirements. RFIs are never provided to the CM Contractor first. The box of RFI Process is also very confusing. RFIs are provided to the COR who then gives them to the CM Contractor for review. The CM Contractor provides their review back to the COR who gives an official response to the Construction Contractor.
25. Under Task C.6, AcMeCtr seems to believe that they will work with the construction contractor to prepare cost estimates and scopes of work for modifications. Estimates are prepared independently of the contractor and the contractor does not have input on the scope of any modifications. Also, the technical analysis does not include design drawings.
26. The last paragraph under Task C.9 on page 2-9 notes that "CM prepares payment recommendation documentation" which does not follow SOW C.9 b. The SOW requires that the FEM complete IBWC Form 242, not the "CM."
27. On page 15 AcMeCtr notes that "Review and approval of progress payments starts with approval of the contractor's baseline schedule of values." This once again shows that AcMeCtr does not understand the work required under this construction



- contract. This is a unit price construction contract. There will not be a schedule of values. If AcMeCtr had reviewed the construction bid schedule as well as Technical Specifications this would become apparent.
28. AcMeCtr seems to think that USIBWC or the design engineer create the record drawings. AcMeCtr needs to review Technical Specifications Section 01.78.39 as well as SOW Task C.10.
 29. AcMeCtr is lacking significant items required to be included in the monthly report per SOW C.2. b.(1) items ii., iii., v., vi., and vii.
 30. AcMeCtr does not seem to understand the difference between claims and modifications generated from design changes. The box on Claim Adjustments on page 26 includes preparing of SOW and sketches which are only required for design changes, not claims and these are provided only when requested by the COR. Page 25 also states the FEM "understands that Contracting Officer's objective is to negotiate a contract of a type and with a price providing the Contractor the greatest incentive for efficient and economical performance." This statement is confusing and the CM is not involved in any contract negotiations.
 31. AcMeCtr completely got the requirements for labor interviews wrong. SOW C.8 c. clearly states that the "CM Contract is not responsible for determining if employees are being paid per the Contract nor are they responsible for follow up investigations that may be based upon the labor interviews. The CM Contractor is only responsible for performing the labor interview itself."
 32. AcMeCtr makes no mentions under Task C.14 for Post Construction Support of the required review of closeout submittals and preparation of the log of construction Contract closeout documents required for tracking by the CM.
 33. AcMeCtr makes no mention of the required tasks and activities for post construction support to determine if they properly understand their responsibility under this phase.
 34. In all of the documentation listed, AcMeCtr has left out the most critical item: daily reports.
 35. AcMeCtr makes no mention of the required task to prepare minutes for all progress meetings. They only mention their attendance at meetings.
 36. On page 19 under evaluation criterion 5, AcMeCtr states "the CI will work out of the Las Cruces, New Mexico office." Technical Specifications Section 01.52.13 1.8 requires the Construction Contractor to provide a field office for the Government's use and occupation. This field office is provided for the CI's use as indicated in SOW E. and he is required to report to this office during the period of full-time onsite CI services.
 37. It does not appear that AcMeCtr has read the SOW given that various items under the CM tasks reflect the language in prior SOWs and are missing new items required for this project. AcMeCtr has also not updated all project specific items. Examples include:
 - a. Civil Design Elements on page 17 discuss protection of east levee, not west;



- b. Task C.2 Monthly Reports are missing new requirements for additional detail to be included in the reports;
- c. Task C.6 is missing design reviews for modifications;
- d. Task C.7 on page 21 mentions ensuring quality for a canal reconstruction project;
- e. Task C.7 on page 22 includes monitoring inventory of spare parts and their storage;
- f. Task C.7 on page 22 mentions analytical data reviews and analytical laboratory QA/QC package; and,
- g. Task C.9 mentions reviewing installation of major equipment.



10 VOLUME II-PRICE PROPOSAL

10.1.PROPOSAL REQUIREMENTS

10.1.A.Item 1.2.A.2. requires the proposal to provide pricing data for each Contract Line Item Number (CLIN).

10.1.B.Follow the requirements for Volume II in the SOW under '*Proposals and Task Order Evaluation Criteria.*'

10.2.GENERAL GUIDANCE

10.2.A.Put all related work in the applicable CLINs.

10.2.B.If the quantities used to calculate a CLIN do not match the CLIN quantities explain the discrepancy. For example, hours worked not equaling 8 for an overtime day.

10.2.C.Provide clear details of any items that do not match the SOW requirements.

10.2.D.It helps to provide a copy of Excel spreadsheets used to create pricing.



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