



Upper Occoquan Service Authority

Leader in Water Reclamation and Reuse

14631 COMPTON ROAD, CENTREVILLE, VIRGINIA 20121-2506
(703) 830-2200

TO ALL RFP RECIPIENTS:

For UOSA RFP 26-09 Asset Management Roadmap

SUBJECT: Addendum # 2

The above numbered solicitation is amended as set forth below. The hour and date specified for receipt of offers:

☒ is not extended

☐ is extended

OFFERORS MUST ACKNOWLEDGE receipt of this Addendum by one of the following methods:

- a. By acknowledgement of this Addendum on Submission Form submitted with the proposal;
- b. By referencing its receipt in your Transmittal Letter

If by virtue of this Addendum you desire to change a proposal already submitted, such change may be made by letter, provided it includes reference to the solicitation and this Addendum and is received prior to the due hour and date specified.

DESCRIPTION OF ADDENDUM:

1. To provide answers to all questions receive before the deadline as Attachment A to this addendum
2. To provide changes to RFP language as Attachment B to this addendum
3. To provide a replacement Solicitation Response Form as Attachment C to this addendum. This form shall replace the Solicitation Response Form originally provided as RFP 26-09 Attachment B.
4. To provide the sign in sheet from the pre-proposal meeting held January 9, 2026 as Attachment D to this addendum

All other Terms, Conditions, Tables, Charts and Specifications, and Drawings not otherwise changed remain as originally stated or as shown.

ISSUED BY:

Upper Occoquan Service Authority

A handwritten signature in blue ink, appearing to read 'Dustin Baer', is written over a horizontal line.

Dustin Baer, Purchasing Manager

01/16/2026

Date

UOSA RFP 26-09 Addendum #2 – Attachment A Q&A

1. Q: Would the cover page, table of contents, and resumes included in an appendix count towards the page limit?

A: The cover page, table of contents, and resumes included in an appendix do not count towards the 30-page limit.

2. Q: In RFP Section 3.5, B (Cost Proposal), there seems to be some redundant information that is a bit confusing. Could UOSA please clarify exactly what needs to be included within the Cost Proposal?

A: Cost proposals will no longer be required with your technical proposal submission (See Addendum #2 Attachments B&C)

3. Q: RFP Section 3.6 indicates that the Cost Proposal is worth 20 points if selected for the interview. Could UOSA please elaborate on how they intend to award these points to each of the firms based on the Cost Proposal?

A: See answer to question 2.

4. Q: Can you please share the Pre Proposal attendance sheet?

A: The pre-proposal attendance sheet has been included with this addendum as Attachment D.

5. Q: Given the release of the RFP over the holiday season, would the Authority consider an extension to the submittal deadline?

A: The deadline was extended in Addendum #1.

6. Q: Please confirm that proposal submittals made through the eVA platform do not require the additional submission of one original written Technical Proposal with an original signature.

A: Proposals submitted through the eVA platform do not require additional hard copy submissions.

7. Q: Please confirm whether this contract includes professional services and if price proposals are required to be submitted.

8. A: We have decided to change the evaluation criteria to be in accordance with the VPPA requirements for professional services. Cost proposals will no longer be required with your technical proposal submission (See Addendum #2 Attachment B)

9. Q: Due to the task-based nature of this contract, it is assumed that the intent of the cost proposal is to provide rates and overhead information as opposed to a detailed cost

breakdown/estimate based upon the provided scope description in the RFP. Please confirm the desired format of the cost proposal.

A: See answer to question 2.

10. Q: If a detailed cost proposal based on the provided scope description is required, please confirm that no cost estimate is required for the Optional As-Needed Services described under Task 2.7 of the RFP document.

A: See answer to question 2.

11. Q: Section 2.9 Project Timeline states that the first phase of this project is anticipated to take 6 months to complete. Could the Authority please clarify which scope items fall under Phase 1?

A: The first phase is described in paragraph 2.3, 2.4, 2.5, and 2.6. Deliverables expected for the first phase are shown in paragraph 2.10.

12. Q: Please confirm that resumes and supporting documentation listed under Item 9. Attachments of the Technical Proposal instructions do not count towards the 30-page limit.

A: Resumes and supporting documents do not count towards the 30-page limit.

13. Q: Section 2.8 (3) Communication Strategy states that there are two main stakeholder groups, including internal staff as well as external audiences aforementioned above. Please clarify the external audiences and in which section they are listed.

A: The solicitation does not list specific internal or external stakeholders because the intent is to rely on the successful bidder's experience and expertise in developing and implementing communication and stakeholder engagement strategies for projects of this nature. UOSA serves four jurisdictions and owns numerous assets located off UOSA property; therefore, we anticipate that engagement with external stakeholders will be required, if not during Phase 1, then in subsequent phases of the project.

For increased clarity, we will remove the sentence: *"Two main stakeholder groups include internal staff as well as external audiences aforementioned above."*

14. Q: Section 2.9 Project Timeline references a "first phase of this project" – please provide clarification on what scope items are included in the "first phase" and what may be included in subsequent phases.

A: See answer to question #10.

15. Q: Will the contract be considered a Professional Services contract as defined by Virginia Public Procurement Act (VPPA)? If so, please confirm the Cost Proposal (Section 3.5, B) will be required.

A: Yes, we have decided to change the evaluation criteria to be in accordance with the VPPA requirements for professional services. Cost proposals will no longer be required with your technical proposal submission (See Addendum #2 Attachments B&C)

End Attachment A

UOSA RFP 26-09 Addendum #2 – Attachment B

1. The second sentence in paragraph 2.8.3) beginning “Two main stakeholder groups...” shall be removed.
2. The first sentence in Section 2.9 shall be removed and replaced with the following:

The anticipated duration to complete the first phase of this project, as described in section 2.3, 2.4, 2.5, and 2.6 above and the deliverables outlined in section 2.10 below, is 6 months from the date of contract execution.

3. The following language shall replace RFP Section 3.5.B in its entirety:

B. Cost Proposal

The cost proposal is not required to be submitted with the Technical Proposals at the date/time due shown on the cover page of this solicitation. At the discussion stage of the evaluation process the Offerors with the highest ranked technical proposals may be requested to submit a written non-binding Cost Proposal. The Cost Proposal, when requested, should be structured as outlined in this section.

The Cost Proposal should provide hourly costs associated with staff members who will be part of performing any portion of the Work. This should also include any administrative fees and other costs associated with reports, policies and programs as may be required to perform Work.

The Cost Proposal must include the following:

- Names, titles and labor category of all personnel expected to be assigned to the project.
 - Hourly Rates for each individual or labor category.
 - Overhead Factors and a clear explanation of how the overhead rate is derived.
 - Breakdown of Costs including labor, materials, travel (if applicable), and any other relevant expenses.
 - Multiplier if using sub-contractors
4. The evaluation criteria scoring matrix provided in Section 3.6.B shall be replaced with the following:

Element	Maximum Points Allowed
Professional Qualifications (volume I)	10
Past involvement with Similar Projects (volume I)	20
Proposed Work Plan (volume I)	15
<i>If selected for interview:</i>	
Interview Evaluation	30
Reference Check	25
Max Total Points Allowed	100

5. Paragraph six in Section 3.6.B beginning “During the interview...” shall be removed and replaced in its entirety with the following:

During the interview, offerors must also be prepared to justify all elements of their non-binding Cost Proposal, if requested and provided prior to interview, including:

- Personnel cost assumptions
- Overhead calculations
- Time and material estimates

6. Section 3.14 Ranking and Selection shall be removed and replaced in its entirety with the following:

3.14 Ranking and Selection

UOSA shall engage in individual discussions with two or more offerors deemed fully qualified, responsible and suitable on the basis of initial responses and with emphasis on professional competence, to provide the required services. Repetitive informal interviews shall be permissible. The offerors shall be encouraged to elaborate on their qualifications and performance data or staff expertise pertinent to the proposed project, as well as alternative concepts. Ranking of Offerors shall be performed using evaluation criteria listed in Section 3.6.

As stated in Section 3.5, offerors are not required to furnish estimates of man-hours or cost for services. At the discussion stage, the public body may discuss nonbinding estimates of total project costs, including, but not limited to, life-cycle costing, and where appropriate, nonbinding estimates of price for services. Proprietary information from competing offerors shall not be disclosed to the public or to competitors.

At the conclusion of discussion, outlined in this subdivision, on the basis of evaluation factors published in Section 3.6 and all information developed in the selection process to

this point, UOSA shall select in the order of preference two or more offerors whose professional qualifications and proposed services are deemed most meritorious.

PLEASE NOTE: Offerors are not requested or required to list any exceptions to proposed contractual terms and conditions until AFTER the qualified offerors are ranked for negotiations.

Final negotiations with top ranked Offerors will begin with terms and conditions. The final Contract with a successful Offeror will contain the Terms and Conditions from this RFP and the Sample Contract provided as Attachment B to this RFP. If the top ranked Offeror(s) intend(s) to take exception to any Terms and Conditions or proposal additional or alternative language they must:

- (1) Identify clearly the Terms and Conditions to which they take exception and provide additional or alternate terms within three (3) days of being notified of being a top Ranked Offeror.
- (2) Failure to identify clearly the terms and conditions for exception or alternate language may result in termination of negotiations.

If a contract satisfactory and advantageous to the public body can be negotiated with acceptable terms and conditions and rates considered fair and reasonable by UOSA, then an award shall be made to that Offeror. If a contract containing both terms and conditions acceptable to UOSA and rates considered fair and reasonable by UOSA cannot be negotiated, negotiations will be terminated and conducted with the next ranked Offeror, and so on.

Should UOSA determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified and suitable than the others under consideration, a contract may be negotiated and awarded to that offeror.

End Attachment B



UOSA RFP 26-09 Addendum #2 - Attachment C

RFP Number: 26-09

Title: Asset Management Roadmap

Company Identification

Name	Contact Name
Mailing	Title
Address	Phone
Remit	Fax
Address	Email
FEIN #	VA SCC ID #

**Pursuant to VA Code § 2.2-4311.2, an offeror organized or authorized to transact business in the Commonwealth must include its VA SCC provided ID# or proof of pending application for SCC authorization. If offeror is exempt from SCC authorization requirement they shall include, as a separate attachment, a statement accurately and completely reflecting why the offeror does not need to be so authorized. See Section 2.2 in the Standard Terms and Conditions.*

Company Classification

Principal place of business located in (state) _____ State of incorporation _____

Check one: Sole Prop. ☐ Partnership ☐ Limited Partnership ☐ Corporation ☐ Limited Liability Corporation ☐

Check all that apply: Small ☐ Women Owned ☐ Minority Owned ☐ Service Disabled Veteran Owned ☐

Addenda Receipt Confirmation:

Addendum # ____ ☐, Addendum # ____ ☐, Addendum # ____ ☐, Addendum # ____ ☐, Addendum # ____ ☐

Confirmation of Compliance to Solicitation Requirements, Terms and Conditions

The undersigned offers and agrees to furnish the goods, and/or services requested in solicitation 26-09 in accordance with the attached offer. The undersigned certifies that they have read and understand all standard and supplemental terms and conditions provided in the aforementioned solicitation including but not limited to Standard Terms and Conditions Section 2.1 - Collusion, Section 2.2 - Compliance with Laws and Section 2.9 - Ethics in Public Contracting.

The attached offer is in accordance with all specifications and offeror accepts all terms and conditions contained in and incorporated by reference into the solicitation,

☐ with no exceptions.

☐ with the following exceptions/modifications (provided as separate attachment).

☐ Offeror has reviewed all specifications and terms and conditions, however under Virginia Code § 2.2-4302.2.4, Offeror is not required to provide any exceptions unless or until requested to do so as part of formal negotiations.

Authorized Signature _____
(must be original, ink signature)

Date _____

Printed Name _____

Title _____

Submission Checklist – The following documents and forms are required as part of your submission. See Section 3.5

Solicitation Response Form (this form)	<input type="checkbox"/>	_____
Technical Proposal	<input type="checkbox"/>	_____
_____		_____
_____		_____

UOSA RFP 26-09 Addendum #2 – Attachment D

UOSA RFP #26-09 – Asset Management Roadmap

Pre-Proposal Conference and Site Tour Attendance Sheet

January 9, 2026

Name	Company	Email
DUSTIN BAKER	UOSA	dustin.baker@uosa.org
Iesha Shephard	ICU Elevate	iesha.shephard@icuelevate.com
STEVEN HUTCHINGS	HAZEN	SHUTCHINGS@HAZENANDSAWYER.COM
Brian ten Siethoff	Amcl	btensiethoff@amcl.com
JOHN MCGETTIGAN	BROWN AND CALDWELL	jmcgettigan@bruncald.com
ANNE KENNEDY	BROWN AND CALDWELL	akennedy@bruncald.com
Alison Barton	EA Engineering	abarton@eaest.com
BETH SCHRAYSHUEN	EA Engineering	bschrayshuen@eaest.com
Ahmet OZMAN	Black & Veatch	ozman@bv.com
Josh Goldman	CDM Smith	jgoldman@cdmsmith.com
Star Carter	CDM Smith	carterst@cdmsmith.com
Patrick McVerry	Avero Advisors	pmcverry@averoadvisors.com
Marleen TIFU	GFT	mtifu@gftinc.com
Aditya Ramamurthy	Raffetis	aramamurthy@raffetis.com
NINA ANDGREN	UOSA	nina.andgren@uosa.org
TAYLOR MCLARTHY	UOSA	taylor.mccarthy@uosa.org