



MEDICAL CENTER
OF THE AMERICAS
FOUNDATION

Request for Proposal (RFP)
For the Bi-National BioMedical Cluster
Ecosystem Mapping & Roadmap Development
El Paso, Texas, USA; Juarez, Chihuahua, Mexico

ADDENDUM #1
January 16, 2019

- I. MCA Foundation has received the following questions related to the Request For Proposal dated January 3, 2019 and provides responses as indicated:

Question 1. In section IV.1 you mention report gathering. Some of the reports have cost and could be expensive (thousands of dollars), will MCA reimburse the cost of such reports to the consultant?

Response 1. MCA recommends listing any reports or data that you would have to purchase for this project and the costs of the reports/data in the proposal, noting which reports are essential to your work versus optional. Please indicate the costs that you would expect to be reimbursed by the MCA and which are included in your overall pricing. Thus, the MCA can evaluate these separate costs along with the overall proposal in comparison to other bidders in line with evaluation criteria stated in Section VIII.A.

Q.2. Section IV.2.C, will MCA facilitate (introductions, etc.) the meetings with the stakeholders? or is it responsibility of the consultant to contact the stakeholders and setup the meetings?

R.2. MCA will facilitate most of the meetings and tours with stakeholders (e.g., introductions, meeting scheduling, logistics to get to meeting locations). However, the selected consultant should review the list of stakeholders and meetings to help identify any gaps or missing critical stakeholders. Once a new stakeholder is discovered, MCA and consultant can work together (with the BIO-EPJ Executive Committee) to establish contact with the stakeholder and arrange meetings, if necessary.

Q.3. In the same section you list various groups of stakeholders and then specify (1 meeting). Is it one meeting with each of the stakeholders listed in each group? or is it one meeting with (any) one of the stakeholders in each group (i.e. one meeting with any of the 3 stakeholders of the City of El Paso, whichever we choose and is available).

R.3. In Section IV.2.C. MCA aims to facilitate 1-2 meetings with that encompasses all “stakeholder groups” listed under that number to expedite the process and be efficient. For example, the MCA will organize 1 meeting that includes the Mayor, 2-3 City Council Representatives (to avoid quorum issues) and Economic Development Staff. However, 2 meetings will be required with the Institutions of Higher Education – 1 will be held in Juarez and 1 will be held in El Paso – to accommodate logistics. In contrast, tours of and meetings with the manufacturing companies and suppliers will be done individually with

each company to respect confidentiality. The number of meetings is a best estimate; however, a couple of additional meetings may be required if new companies are identified that were not already on the list, for follow-up or due to scheduling problems. The goal is to be as efficient as possible in gathering information but respecting corporate rules and confidentiality.

Q.4. The proposal must be delivered in physical format?

R.4. As stated in Section X.B.:

Respondents shall submit four (4) spiral bound copies and one (1) electronic version on a CD (Note: the CD copy must be exactly the same as the original hard copy) of their proposal in a sealed envelope / package, no later than 3:00 PM (Mountain Time) February 6, 2019 to:

Emma W. Schwartz
President, MCA Foundation
5130 Gateway East, Suite 110
El Paso, Texas 79905

Q.5. The proposal can be delivered in horizontal (.PPT) format or in vertical format?

R.5. Yes. The proposal can be delivered in any format that works for the Offeror; however, the Tab Format and number of pages listed in the RFP must be complied with to facilitate the review of proposals, as stated in Section VII. A, B & C.

Q.6. Is it possible for you to sign the Contract with a Mexican company or does it have to be signed with a USA based company?

R.6. The contract must be signed with a USA-based company.

Q.7. Could you confirm if MCA foundation is the complete legal name to whom we will sign the Contract? Could you kindly provide your tax code?

R.7. The legal name under which the Services Agreement will be signed is "Medical Center of the Americas Foundation" EIN #20-8314979.

Q.8. Although we are not prepared to bid on this RFP in its entirety alone, we are consultants in the Southern New Mexico area available for subcontract to assist with "Stakeholder meetings and tours including Project Steering Committee, Stakeholder Groups and Device Manufacturer Tours," "Industry update and Regional analysis," and "Support of key Deliverables such as Industry Snapshots and Analysis, the Strategic Plan (narrative) and the Site Selection Package (positioning)." Richard Kadzis and Karen Choate @ (678) 687-9724 mobile.

R.8. Bidders are welcome to contact the above individuals if the bidder feels they need this assistance through a sub-contract.

Q.9. We are forming a multi-firm team to submit a proposal for this study, are there any concerns for the Committee regarding this partnering approach.

R.9. No, the Selection Committee has no concerns regarding this approach.

Q.10. So that we can best tailor our response, can you share the budget range that has been established for this work?

R.10. MCAF would like for the budget not to exceed \$250,000, inclusive of fees and expenses. However, firm may suggest budget items in excess of this budget amount that are optional for MCAF's consideration.

Q.11. Is there form for the cover page or do you simply want a copy of the first page of the RFP?

R.11. The first page of the RFP is acceptable.

Q.12. Can we recreate the Personnel Profile (Exhibit A) in Word format or are we required to submit as an Excel document?

R.12. Yes, you can recreate the Personnel Profile (Exhibit A) in Word format. The Excel format is NOT required.

Q.13. Is there an expectation for when the project should start, and be completed by? If so, can you please advise?

R.13. We would like to have the project completed by the end of August 2019, in anticipation of the MedTech Conference on Sept. 23-25 where we would like to be able to present some of the report findings in our marketing materials.

Q.14. Looking back at the final report that was delivered by Fluor Corporation in March 2009, is there any additional analysis that MCAF wished it had included as part of the original scope?

R.14. The Fluor report spent a lot of time explaining why our region should not be engaging in certain areas of the life sciences industry, such as pharma, which was an enlightening finding at the time. We would like for this report to drill down deeper into the medical device manufacturing, product development, R&D and innovation, which is the more appropriate target for our region at this time.

Q.15. Does MCAF have a "baseline" list of catalogue participants?

R.15. Yes, we have a quite robust list of industry stakeholders in El Paso and Juarez, most likely the largest and most impactful; however, we learn of new participants in the industry on a weekly basis.

Q.16. What strategies were not pursued from the previous Fluor Report?

R.16. Every strategy suggested in the Fluor Report has been implemented, but in differing degrees. The Fluor work was commissioned by REDCO, which was subsequently dissolved, and a new entity, Borderplex Alliance, was created. The MCAF eventually took the lead on the implementation of the Fluor report recommendations. Thus, they have not been implemented exactly as proposed, as players and the industry landscape have changed over the last 10 years. However, the spirit of the recommendations has been pursued by the MCAF, although they may not have been pursued exactly as presented in the report.

Q.17. Did the previous strategy include a comparative analysis of other US bioclusters (Boston, MA or Research Triangle, NC)?

R.17. The Hammes, Co./E-Cubed Ventures business plans that were prepared for the MCA Foundation in 2013 included a robust analysis of other US bioclusters in different phases of the innovation pipeline: discover, develop, deploy.

Q.18. Will our firm need to map all industry components within the "borderplex" or those specifically related to the biomedical industry?

R.18. The firm would only need to map non-biomedical industry components that are significant or impactful to the biomedical industry. For example, an automotive innovation center that was formed out of a traditional automotive manufacturing facility may be a good model to map. Or a strong electrical engineering program at a local university may be good to identify as a workforce contributor to medical device innovation and product development.

Q.19. Section IV, Scope of Services, references: “The services contemplated for this project should help MCAF establish a baseline for the regional industry and understand how it compares to the global industry.” What is the scope of this baseline?

R.19. The scope of the baseline requested could be presented in a cluster map comparison to other biomedical device regions or other similar quantitative method for us to monitor our progress over time.

Q.20. Section IV, Scope of Services, references: “The services contemplated for this project should help MCAF create a roadmap for improving the industry and growing its global competitiveness.” Does “Roadmap” mean the “Strategic Plan” (Deliverable C) and “Site Selection Package” (Deliverable D) or is the Roadmap a separate deliverable?

R.20. The terms “Roadmap” and “Strategic Plan” are the same concept that are intended to lay out a work plan and goals for improvement that we can create initiatives, projects or work-groups around. The “Site Selection Package” is separate from the “Strategic Plan” and is intended to provide information that represents our current industry presented in a way that would assist the MCAF attract investments in the region’s medical device industry (e.g., new manufacturers, introduction of R&D to a corporate manufacturing facility, new clients for contract manufacturers, new suppliers).

Q.21. In addition to meetings and tours, would MCAF be amendable to additional ways to capture information such as surveys?

R.21. Yes, as an additional way but not as a primary way.

Q.22. Will NDAs be required with each stakeholder in order to engage in meetings and tours?

R.22. Yes, NDAs will most likely be required for the tours and meetings with the manufacturers and suppliers, not with the universities, government and economic development agencies, etc. We have committed to the manufacturers and suppliers that we have already met with that their information would be kept confidential between the selected consultants and MCAF staff. MCAF and BIO-EPJ board directors would not have access to the detailed workpapers or meeting/tour notes. We committed to only publish their information in the aggregate of other stakeholders, not individually unless agreed to in writing in advance. Gaining and keeping the trust of these stakeholders is highly important.

Q.23. Please confirm that the NDAs will be executed between MCAF / BIO-EPJ and meeting / tour participants.

R.23. Yes.

Q.24. We appreciate that the concept for the ecosystem “refresh” will be presented to members at the Bio-EPJ Annual Meeting and intend on attending this event. Will our firm be able to validate some of its approach and strategy ideas with members at the Bio-EPJ Annual Meeting? Will MCAF be in a position to facilitate this “pressure testing” activity?

R.24. Yes, if coordinated in advance. Please provide additional information on this request ASAP so that it can be accommodated logistically as the agenda for the meeting is being finalized.

Q.25. Our policy is to not disclose contact information until permission to contact the reference is given; will this be permissible?

R.25. Yes.

Q.26. Does an award for this RFP prevent us from pursuing / winning any subsequent phase of work (e.g., recommended initiatives, operationalizing recommended objectives)?

R.26. No, an award for this RFP doe NOT prevent the awarded firm from pursuing additional work.

Q.27. Would MCAF consider alternative contract structures?

R.27. Yes, please present the alternative contract structure in your proposal. We will evaluate it in the context of competitive proposals.

Q.28. Are any amendments to the RFP likely to alter timelines impacting scope, deliverables, or T&C's?

R.28. No.

Q.29. Would MCAF be amenable to using our firm's standard MSA / Consulting Agreement?

R.29. Yes, please present your firm's standard MSA / Consulting Agreement in your proposal. Please identify any significant difference from our proposed form.

Q.20. Would MCAF be amendable to our firm asking follow-up questions, based on the answers that we receive?

R.20. Yes. If follow-up questions are asked subsequent to these responses being posted, an 2nd Amendment to the RFP will be published within 2 days of receiving the additional questions. Please submit any follow-up questions by Friday, January 18, 2019 at 3:00 pm MT.

END OF ADDENDUM #1



MEDICAL CENTER
OF THE AMERICAS
FOUNDATION

Request for Proposal (RFP)
For the Bi-National BioMedical Cluster
Ecosystem Mapping & Roadmap Development
El Paso, Texas, USA; Juarez, Chihuahua, Mexico

ADDENDUM #1
January 16, 2019

- I. MCA Foundation has received the following questions related to the Request For Proposal dated January 3, 2019 and provides responses as indicated:

Question 1. In section IV.1 you mention report gathering. Some of the reports have cost and could be expensive (thousands of dollars), will MCA reimburse the cost of such reports to the consultant?

Response 1. MCA recommends listing any reports or data that you would have to purchase for this project and the costs of the reports/data in the proposal, noting which reports are essential to your work versus optional. Please indicate the costs that you would expect to be reimbursed by the MCA and which are included in your overall pricing. Thus, the MCA can evaluate these separate costs along with the overall proposal in comparison to other bidders in line with evaluation criteria stated in Section VIII.A.

Q.2. Section IV.2.C, will MCA facilitate (introductions, etc.) the meetings with the stakeholders? or is it responsibility of the consultant to contact the stakeholders and setup the meetings?

R.2. MCA will facilitate most of the meetings and tours with stakeholders (e.g., introductions, meeting scheduling, logistics to get to meeting locations). However, the selected consultant should review the list of stakeholders and meetings to help identify any gaps or missing critical stakeholders. Once a new stakeholder is discovered, MCA and consultant can work together (with the BIO-EPJ Executive Committee) to establish contact with the stakeholder and arrange meetings, if necessary.

Q.3. In the same section you list various groups of stakeholders and then specify (1 meeting). Is it one meeting with each of the stakeholders listed in each group? or is it one meeting with (any) one of the stakeholders in each group (i.e. one meeting with any of the 3 stakeholders of the City of El Paso, whichever we choose and is available).

R.3. In Section IV.2.C. MCA aims to facilitate 1-2 meetings with that encompasses all “stakeholder groups” listed under that number to expedite the process and be efficient. For example, the MCA will organize 1 meeting that includes the Mayor, 2-3 City Council Representatives (to avoid quorum issues) and Economic Development Staff. However, 2 meetings will be required with the Institutions of Higher Education – 1 will be held in Juarez and 1 will be held in El Paso – to accommodate logistics. In contrast, tours of and meetings with the manufacturing companies and suppliers will be done individually with

each company to respect confidentiality. The number of meetings is a best estimate; however, a couple of additional meetings may be required if new companies are identified that were not already on the list, for follow-up or due to scheduling problems. The goal is to be as efficient as possible in gathering information but respecting corporate rules and confidentiality.

Q.4. The proposal must be delivered in physical format?

R.4. As stated in Section X.B.:

Respondents shall submit four (4) spiral bound copies and one (1) electronic version on a CD (Note: the CD copy must be exactly the same as the original hard copy) of their proposal in a sealed envelope / package, no later than 3:00 PM (Mountain Time) February 6, 2019 to:

Emma W. Schwartz
President, MCA Foundation
5130 Gateway East, Suite 110
El Paso, Texas 79905

Q.5. The proposal can be delivered in horizontal (.PPT) format or in vertical format?

R.5. Yes. The proposal can be delivered in any format that works for the Offeror; however, the Tab Format and number of pages listed in the RFP must be complied with to facilitate the review of proposals, as stated in Section VII. A, B & C.

Q.6. Is it possible for you to sign the Contract with a Mexican company or does it have to be signed with a USA based company?

R.6. The contract must be signed with a USA-based company.

Q.7. Could you confirm if MCA foundation is the complete legal name to whom we will sign the Contract? Could you kindly provide your tax code?

R.7. The legal name under which the Services Agreement will be signed is "Medical Center of the Americas Foundation" EIN #20-8314979.

Q.8. Although we are not prepared to bid on this RFP in its entirety alone, we are consultants in the Southern New Mexico area available for subcontract to assist with "Stakeholder meetings and tours including Project Steering Committee, Stakeholder Groups and Device Manufacturer Tours," "Industry update and Regional analysis," and "Support of key Deliverables such as Industry Snapshots and Analysis, the Strategic Plan (narrative) and the Site Selection Package (positioning)." Richard Kadzis and Karen Choate @ (678) 687-9724 mobile.

R.8. Bidders are welcome to contact the above individuals if the bidder feels they need this assistance through a sub-contract.

Q.9. We are forming a multi-firm team to submit a proposal for this study, are there any concerns for the Committee regarding this partnering approach.

R.9. No, the Selection Committee has no concerns regarding this approach.

Q.10. So that we can best tailor our response, can you share the budget range that has been established for this work?

R.10. MCAF would like for the budget not to exceed \$250,000, inclusive of fees and expenses. However, firm may suggest budget items in excess of this budget amount that are optional for MCAF's consideration.

Q.11. Is there form for the cover page or do you simply want a copy of the first page of the RFP?

R.11. The first page of the RFP is acceptable.

Q.12. Can we recreate the Personnel Profile (Exhibit A) in Word format or are we required to submit as an Excel document?

R.12. Yes, you can recreate the Personnel Profile (Exhibit A) in Word format. The Excel format is NOT required.

Q.13. Is there an expectation for when the project should start, and be completed by? If so, can you please advise?

R.13. We would like to have the project completed by the end of August 2019, in anticipation of the MedTech Conference on Sept. 23-25 where we would like to be able to present some of the report findings in our marketing materials.

Q.14. Looking back at the final report that was delivered by Fluor Corporation in March 2009, is there any additional analysis that MCAF wished it had included as part of the original scope?

R.14. The Fluor report spent a lot of time explaining why our region should not be engaging in certain areas of the life sciences industry, such as pharma, which was an enlightening finding at the time. We would like for this report to drill down deeper into the medical device manufacturing, product development, R&D and innovation, which is the more appropriate target for our region at this time.

Q.15. Does MCAF have a "baseline" list of catalogue participants?

R.15. Yes, we have a quite robust list of industry stakeholders in El Paso and Juarez, most likely the largest and most impactful; however, we learn of new participants in the industry on a weekly basis.

Q.16. What strategies were not pursued from the previous Fluor Report?

R.16. Every strategy suggested in the Fluor Report has been implemented, but in differing degrees. The Fluor work was commissioned by REDCO, which was subsequently dissolved, and a new entity, Borderplex Alliance, was created. The MCAF eventually took the lead on the implementation of the Fluor report recommendations. Thus, they have not been implemented exactly as proposed, as players and the industry landscape have changed over the last 10 years. However, the spirit of the recommendations has been pursued by the MCAF, although they may not have been pursued exactly as presented in the report.

Q.17. Did the previous strategy include a comparative analysis of other US bioclusters (Boston, MA or Research Triangle, NC)?

R.17. The Hammes, Co./E-Cubed Ventures business plans that were prepared for the MCA Foundation in 2013 included a robust analysis of other US bioclusters in different phases of the innovation pipeline: discover, develop, deploy.

Q.18. Will our firm need to map all industry components within the "borderplex" or those specifically related to the biomedical industry?

R.18. The firm would only need to map non-biomedical industry components that are significant or impactful to the biomedical industry. For example, an automotive innovation center that was formed out of a traditional automotive manufacturing facility may be a good model to map. Or a strong electrical engineering program at a local university may be good to identify as a workforce contributor to medical device innovation and product development.

Q.19. Section IV, Scope of Services, references: “The services contemplated for this project should help MCAF establish a baseline for the regional industry and understand how it compares to the global industry.” What is the scope of this baseline?

R.19. The scope of the baseline requested could be presented in a cluster map comparison to other biomedical device regions or other similar quantitative method for us to monitor our progress over time.

Q.20. Section IV, Scope of Services, references: “The services contemplated for this project should help MCAF create a roadmap for improving the industry and growing its global competitiveness.” Does “Roadmap” mean the “Strategic Plan” (Deliverable C) and “Site Selection Package” (Deliverable D) or is the Roadmap a separate deliverable?

R.20. The terms “Roadmap” and “Strategic Plan” are the same concept that are intended to lay out a work plan and goals for improvement that we can create initiatives, projects or work-groups around. The “Site Selection Package” is separate from the “Strategic Plan” and is intended to provide information that represents our current industry presented in a way that would assist the MCAF attract investments in the region’s medical device industry (e.g., new manufacturers, introduction of R&D to a corporate manufacturing facility, new clients for contract manufacturers, new suppliers).

Q.21. In addition to meetings and tours, would MCAF be amenable to additional ways to capture information such as surveys?

R.21. Yes, as an additional way but not as a primary way.

Q.22. Will NDAs be required with each stakeholder in order to engage in meetings and tours?

R.22. Yes, NDAs will most likely be required for the tours and meetings with the manufacturers and suppliers, not with the universities, government and economic development agencies, etc. We have committed to the manufacturers and suppliers that we have already met with that their information would be kept confidential between the selected consultants and MCAF staff. MCAF and BIO-EPJ board directors would not have access to the detailed workpapers or meeting/tour notes. We committed to only publish their information in the aggregate of other stakeholders, not individually unless agreed to in writing in advance. Gaining and keeping the trust of these stakeholders is highly important.

Q.23. Please confirm that the NDAs will be executed between MCAF / BIO-EPJ and meeting / tour participants.

R.23. Yes.

Q.24. We appreciate that the concept for the ecosystem “refresh” will be presented to members at the Bio-EPJ Annual Meeting and intend on attending this event. Will our firm be able to validate some of its approach and strategy ideas with members at the Bio-EPJ Annual Meeting? Will MCAF be in a position to facilitate this “pressure testing” activity?

R.24. Yes, if coordinated in advance. Please provide additional information on this request ASAP so that it can be accommodated logistically as the agenda for the meeting is being finalized.

Q.25. Our policy is to not disclose contact information until permission to contact the reference is given; will this be permissible?

R.25. Yes.

Q.26. Does an award for this RFP prevent us from pursuing / winning any subsequent phase of work (e.g., recommended initiatives, operationalizing recommended objectives)?

R.26. No, an award for this RFP doe NOT prevent the awarded firm from pursuing additional work.

Q.27. Would MCAF consider alternative contract structures?

R.27. Yes, please present the alternative contract structure in your proposal. We will evaluate it in the context of competitive proposals.

Q.28. Are any amendments to the RFP likely to alter timelines impacting scope, deliverables, or T&C's?

R.28. No.

Q.29. Would MCAF be amenable to using our firm's standard MSA / Consulting Agreement?

R.29. Yes, please present your firm's standard MSA / Consulting Agreement in your proposal. Please identify any significant difference from our proposed form.

Q.20. Would MCAF be amendable to our firm asking follow-up questions, based on the answers that we receive?

R.20. Yes. If follow-up questions are asked subsequent to these responses being posted, an 2nd Amendment to the RFP will be published within 2 days of receiving the additional questions. Please submit any follow-up questions by Friday, January 18, 2019 at 3:00 pm MT.

END OF ADDENDUM #1