



University of Maryland University College

UNIVERSITY OF MARYLAND UNIVERSITY COLLEGE

REQUEST FOR PROPOSAL
for
ARCHITECTURE AND ENGINEERING
DESIGN SERVICES
for the

FIRST FLOOR OF THE ADMINISTRATION BUILDING

SOLICITATION No.: 91345

ISSUE DATE: July 27, 2015

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www.umuc.edu/procurement

- UMUC'S Facilities Master Plan
- AE Solicitation Terms and Conditions
- Standard AE Contract

SECTION I
GENERAL SOLICITATION INFORMATION

Issuing Office: Strategic Contracting
University of Maryland University College
Procurement Officer: Valerie Rolandelli*
Title: Associate VP, Strategic Contracting
Office Name: Strategic Contracting
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Adelphi, MD 20783
Phone: 301-985-7895
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Alternate Contacts: Vera Jones, Coordinator, Strategic Contracting
301-985-7006
vera.jones@umuc.edu

and

Beth Kirk, Senior Buyer, Office of Procurement
301-985-7628
beth.kirk@umuc.edu

Note: The Issuing Office shall be the sole point of contact with the University for purposes of the preparation and submittal of proposals in response to this solicitation. All questions regarding this solicitation shall be directed in writing via email to three (3) people noted above in the Issuing Office. Refer to the Solicitation Schedule for the due date for questions related to the Portfolio Phase.

*Please note that Valerie Rolandelli is out of the office beginning July 29 through August 16, 2015.

This project will be managed by the University of Maryland University College's (UMUC's) Facilities Management Office with contract assistance from UMUC's Strategic Contracting Office.

**SECTION II
SOLICITATION SCHEDULE**

Issue Date	July 27, 2015
Phase 1 Written Questions Due	Submission to Issuing Office by August 17, 2015
Phase 1: Portfolio Submission Date	Submitted electronically to Issuing Office by Wednesday, August 26, 2015 by 11:59 pm
Establish Short List from Phase 1 Submittal	Anticipated by September 4, 2015
Phase 2: Oral Presentation/Interviews with Shortlisted Firms	September 15 and/or 16, 2015 Times & Location to be announced (only shortlist from Phase 1 will be invited to a discussion session)
Establish Final Short List from Interview Sessions	Anticipated by September 21, 2015
Phase 3: Technical Proposals Due	Submission to Issuing Office by October 5, 2015 by 11:59 pm (only final shortlist will be invited to submit a Technical Proposal)
Rank Established Final Short List	Anticipated by October 12, 2015
Phase 4: Fee Negotiation with Top Ranked A/E Firm	dates to be worked out with top ranked AE; negotiations anticipated to be completed by November 6, 2015

SECTION III INTRODUCTION TO PROJECT AND PROCESS

The University System of Maryland is committed to a quality-based selection process for the procurement of architectural and engineering services. Maryland AE firms are encouraged to respond to this solicitation as either primes or in partnership/association with another prime AE. Economic benefit to the State of Maryland will be considered in the selection process in accordance with the State of Maryland's BPW Advisory 1996-4 which may be found at <http://bpw.maryland.gov/Pages/adv-1996-4.aspx>

This A/E selection is anticipated to be done in 4 phases*. These are:

1. Portfolio Phase: Open to any firm, Joint Venture or other form of collaboration who wish to participate
2. Oral Presentation/Interview Phase: A presentation/interview format to which the initial shortlisted will be invited to participate.
3. Technical Proposal Phase: Only those firms shortlisted following the Oral Presentation Phase evaluations will be invited to submit.
4. Fee Proposal and Negotiation Phase: The firm with the highest rating determined by Phases 1 through 3 will be invited to negotiate an A/E fee.

*Note: As the procurement progresses, UMUC reserves the right to revise the anticipated phases. As well, as the procurement progresses, UMUC will provide to the shortlisted AE firms at each phase and at the appropriate time, additional information regarding the project.

A. **Project Summary:** In accordance with UMUC's 2012 Facilities Master Plan (FMP) (provided with this solicitation), UMUC intends to be a pioneer in how faculty and staff will 'come to work' in the future. Non-traditional working arrangements are both possible and desirable for employees and employers. The FMP provides a roadmap that calls for converting our mostly traditional space configurations into more versatile, efficient, and desirable configurations that accommodate a different way of working, i.e. 'workplace/office of the future'. UMUC is now embarking on its first prototype of this workplace model by reconfiguring the first floor of the Administration Building located at UMUC's Adelphi, MD Headquarters Complex for UMUC's Office of Analytics, Planning, and Technology (APT). Perkins Eastman, the firm that produced UMUC's FMP, also produced documents about 18 months ago for a concept for this prototype, **however, UMUC is totally open to new and/or revised program/concepts.** We are **not** expecting the successful AE to complete this existing concept. The successful AE is expected to verify this program/concept as well as make modifications to it as may be required/necessary. The prototype concept documents will be provided to the shortlisted firms following the Portfolio phase.

The AE is to include all disciplines that it deems necessary to complete the project. UMUC intends to select the AE firm who has partnered with the best sub-consultants to form a design team that best illustrates its knowledge, expertise, and experience in designing the 'office of the future'. This project is anticipated to be a turnkey project whereby the construction contractor will be responsible for the entire project, including the provision and installation of all furniture, fixtures, and equipment. Therefore, the AE is responsible for the complete design of the space,

including, but not limited to, the FFE specifications and finishes.

In addition, the AE is to provide behavioral change management services that will support the University with expertise in transitioning the APT workforce to this “workplace/office of the future work environment.”

SECTION IV

A. **Phase One: Portfolio**

As the initial phase of this procurement, interested AE Firms are to submit a Portfolio that provides evidence of its qualifications and experience in designing ‘workplace/offices of the future’ to the Issuing Office in accordance with this Section.

Portfolios shall be submitted electronically to the Procurement Officer and the other two (2) individuals at the Issuing Office no later than the date and time specified in the Solicitation Schedule. Proposals should be succinct and focused; it is expected that the Portfolio (excluding a transmittal letter, table of contents, and the project pictures) should be no more than twenty (20) to twenty-five (25) pages. Proposals or unsolicited amendments to proposals arriving after the due date and time will not be considered. By providing the Portfolio to the University in electronic format, the proposing firm is granting the University the permission to copy and/or transmit the Portfolio to appropriate internal University staff for evaluation purposes.

A **pre-proposal conference** will be not be held.

Refer to the Solicitation Schedule for the **due date and time for questions** regarding this phase of the procurement. Questions are to be provided in writing via email solely to the Issuing Office (see the Solicitation Section I for Issuing Office contact information.) The Issuing Office shall be the sole point of contact with the University for the purpose of the preparation and submittal of Portfolios in response to this solicitation.

1: Portfolio Contents:

- 1.1 A list of the firms that comprise (or disciplines that will comprise, if actual sub-consultants have not yet been selected) the AE’s Team, including firm’s discipline and the addresses of the offices that would service the University. As a well, a brief but informative description of the overall team’s experience in ‘workplace/office of the future designs.’ (Note: If the team is not fully known, then Proposing AE Firm should provide a narrative on how the team members will be selected for this project.)
- 1.2. A general description of the proposed design team organization including, but not limited to, the ability of the AE team to serve the University in the geographical location of the project site.
- 1.3. Proposers should provide the following:
 - 1.3.1 **Lead Design Architect, i.e. the person responsible for the design of the space:** (Note: the Lead Design Architect does not have to be an employee of the prime architectural firm but, may be a part of the design team assembled by the Prime Architectural firm or a member of a Joint Venture)
 - a. Submit a resume for the Lead Design Architect including documentation of no more than three (3) of his/her projects considered to be the most

outstanding samples/evidence of similar and relevant ‘office of the future’ design work.

b. Provide for each sample project:

1. A written statement of the Lead Design Architect’s approach to the ‘office of the future’ design process for each project; overall design philosophy; design issues for the project and how they were addressed; and the specific role of the Lead Design Architect on the project.
2. Describe how the client’s operational, budgetary and quality objectives were accomplished in the ‘office of the future’ design. Address unique and notable aspects of the project, such as its architectural design, space utilization, technical innovations, and other significant features.
3. Provide interior illustrations/pictures of the project that demonstrate the ‘office of the future’ aspects.
4. List any awards, publications, notices, peer recognition, or other documentation of design excellence; and,
5. Provide client contact information. Please be sure that telephone numbers include area codes and extension numbers.

c. Provide any supplemental resume information to demonstrate expertise and experience in the ‘office of the future’ design capabilities not specifically requested that you want to make the University aware.

1.3.2 Lead Interior Designer, i.e. the person responsible for the interior design of the space (provide the following information if the Lead Interior Designer is not the Lead Design Architect provided in 1.3.1 above): (Note: the Lead Interior Designer does not have to be an employee of the prime architectural firm but, may be a part of the design team assembled by the Prime Architectural firm or a member of a Joint Venture)

- a. Submit a resume for the Lead Interior Designer including documentation of no more than three (3) of his/her projects considered to be the most outstanding samples/evidence of similar and relevant ‘office of the future’ design work.

b. Provide for each sample project:

1. A written statement of the Lead Interior Designer's Architect's approach to the 'office of the future' design process for each project; overall design philosophy; design issues for the project and how they were addressed; and the specific role of the Lead Interior Designer on the project.
2. Describe how the client's operational, budgetary and quality objectives were accomplished in the 'office of the future' design. Address unique and notable aspects of the project, such as its architectural design, space utilization, technical innovations, and other significant features.
3. Provide interior illustrations/pictures of the project that demonstrate the 'office of the future' design.
4. List any awards, publications, notices, peer recognition, or other documentation of design excellence; and,
5. Provide client contact information. Please be sure that telephone numbers include area codes and extension numbers.

c. Provide any supplemental resume information to demonstrate expertise and experience in the 'office of the future' design capabilities not specifically requested that you want to make the University aware.

1.3.3 Prime Architectural Design Firm (i.e the Architect of Record Firm) and Interior Design Firm; (these are the firms that are responsible for these disciplines, not the people doing the work):

For each of the firms noted in this Section 1.3.3 provide the following:

- a. Provide a narrative detailing unique aspects of the proposed firm's qualifications and experience for designing 'office of the future' facilities similar to the University's project.
- b. Provide documentation of up to three (3) projects for each of these firms similar to the proposed project:
 1. A written description for each 'office of the future' project, including name and address of the client; include design objectives, approach, space utilization, results, project significance, and key features.

2. Provide interior illustrations/pictures of each project.
3. List any awards, publications, notices, peer recognition, or other documentation of design excellence.

List any team member's and his/her role for this project that are also being proposed for the University's project.

- c. Provide any supplemental information about each firm to demonstrate expertise and experience in the 'office of the future' design capabilities not specifically requested that you want to make the University aware.

2. Portfolio Evaluation

The intent of the Portfolio Phase is to provide Architectural-Engineering Firms an opportunity to present their team's experience in a high quality and relevant design services to meet the needs of the University for this specific project, i.e. for the workplace/office of the future.

A University Qualification Committee ("the Committee") will evaluate the Portfolios for applicability and similarity to the University's project, including, but not limited to, demonstration of design excellence in 'workplace/office of the future' for the purpose of establishing a shortlist of qualified AE Firms that will then be invited to attend an oral/discussion session as described in Phase Two. The evaluation process will be facilitated by the University's Procurement Officer. As the procurement progresses, the Committee may seek input from other appropriate University staff and/or additional assistance from any other source at any time.

The order of importance of the contents of the Portfolio submittal is:

1. Qualifications of the Lead Design Architect specifically in workplace/office of the future;
2. Qualifications of the Lead Interior Designer specifically in workplace/office of the future;
3. Qualifications of the Prime A/E Firm specifically in workplace/office of the future;
4. Qualifications of the Prime Interior Design Firm specifically in workplace/office of the future;
5. The design team's organization, including, but not limited to the firms (or disciplines) that comprise (or will comprise) the design team and their qualifications in workplace/office of the future design.

Based on the Committee's evaluation of the strengths, weaknesses, advantages, and deficiencies in the Portfolios, the Committee will rank the Portfolios and submit a short list of proposers for further consideration to the Procurement Officer. The Procurement Officer will review the recommended a shortlist and will notify proposers of the results of the evaluation. Short-listed AE Firms shall be considered as equal at the conclusion of the Portfolio Phase.

**SECTION V
ANTICIPATED PHASES FOLLOWING PORTFOLIO PHASE**

A. Anticipated Phases 2 through 4 of the Procurement*:

1. **Phase 2 – Oral Presentations/Interviews:** Following the Portfolio Phase, **only** the short listed firms as determined by the ranking resulting from the portfolio review process will be invited to attend an Oral Presentation/Interview Session. The purpose of the Oral Presentations is to allow the Proposer to highlight and explain its qualifications, skills, and vision of the proposed design team as they apply to the requirements of UMUC's Project.

The criteria and format of the oral presentation will be provided to the shortlisted AE Firms in writing at the time of the scheduling of oral presentations. (Refer to Solicitation for anticipated date of notification regarding the shortlist.) The actual time(s) of the Oral Presentations on the date(s) shown in the Solicitation Schedule will be set by the University upon completion of the technical evaluation. **Proposers are advised to set aside these dates in their entirety.** Proposers must determine how it can best present its team members and key personnel's qualifications in the design expertise and experience in 'workplace/office of the future' designs. The Procurement Officer will advise each final shortlisted AE Firm of the date and time for its Oral Presentation.

Following the Oral Presentation/Interview Sessions review process, a further shortlist may result.

2. **Phase 3 - Technical Proposal Submittal:** Only the shortlisted firms following the Oral Presentation/Interviews will be invited to submit a Technical Proposal Submittal which is anticipated to consist of completing SF 330 Part I and II. Details are anticipated to be provided to the final shortlisted firms per the Solicitation Schedule.

Following the Technical Proposal Submittal review process, the technical evaluation will be finalized resulting in a final ranking of the shortlist.

3. **Phase 4 - Fee Negotiations:** The AE Proposer ranked the highest will be requested to submit a detailed price/fee proposal to the University using the form that the University will provide at the pre-fee proposal meeting. A negotiation committee appointed by the procurement officer will be established to negotiate the fee with the invited proposer.

Details regarding the requirements of the fee and the schedule of the fee negotiations will be provided to the top ranked AE Proposer.

***Note:** Proposers are encouraged to submit the best possible proposal at each opportunity for submittal or presentation as UMUC reserves the right to re-sequence the phases and/or waive Phase 2 and/or 3 if deemed in its best interest to do so.

B. Procurement Officer Review:

Upon successful completion of negotiations, the procurement officer will review the rankings of the Final Shortlisted firms and the final fee negotiations with a University System of Maryland (USM) Service Center Executive Group, consisting of a public member and a minimum of one (1) executive management staff from the University. Upon approval of the Executive Group, the Procurement Officer shall proceed to the award.

C. Award:

1. The Procurement Officer will perform all required due diligence and prepare the Standard Form of Agreement with Architects and Engineers for signature by the A/E. (See the Contract at www.umuc.edu/procurement.) The University's Standard Form of Agreement with Architects and Engineers found on the above referenced website is a sample of the form of agreement to be executed between the University and the A/E selected as a result of this solicitation. This is an example only. The final agreement will reflect commitments made by the A/E in its proposal, as well as the result of the fee negotiation process with the successful firm. However, the standard terms and conditions of this Contract will be in substantially the same form in the final agreement, and are not expected to be significantly negotiated by the University, if at all.
2. The award may also be subject to the approval of the State of Maryland Board of Public Works. Upon receipt of all required approvals, the University will execute the Contract with the top ranked AE Firm.

APPENDIX A
Other Solicitation Documents

The following documents are posted at www.umuc.edu/procurement under the Solicitation Number:

It is the Proposer's responsibility to thoroughly review and comply with these documents.

1. UMUC's Facilities Master Plan;
2. Standard Form of Agreement with Architects and Engineers (Sample) – the successful AE firm will be required to execute this contract in substantially the same form.
3. AE Solicitation Terms and Conditions