



**Solicitation Information
July 29, 2015**

RFP# 7549763

TITLE: Statewide Facilities Assessment & Prioritization Planning Services

Submission Deadline: August 26, 2015 at 2:00 PM (ET)

**PRE-BID/ PROPOSAL CONFERENCE: YES
MANDATORY: NO**

**DATE: August 12, 2015 at 10:30 AM (ET)
LOCATION: Department of Administration, Division of Purchases Bid Room, 2nd Floor, One Capitol Hill,
Providence, RI 02908**

Questions received at the Pre-Bid Conference with State responses will be posted as an addendum to this solicitation.

Questions concerning this solicitation must be received by the Division of Purchases at gail.walsh@purchasing.ri.gov no later than **Tuesday, August 11, 2015 at 2:00 PM (ET)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP# on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: NO

BOND REQUIRED: NO

**GAIL WALSH
CHIEF BUYER**

Applicants must register on-line at the State Purchasing Website at www.purchasing.ri.gov

Note to Applicants:

Offers received without the entire completed four-page RIVIP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

Request for Proposals
Statewide Facilities Assessment & Prioritization Planning Services

The Rhode Island Department of Administration, Division of Purchases, on behalf of the School Building Authority at the Rhode Island Department of Education (RIDE), is requesting proposals from qualified vendors to provide facilities assessments and prioritization planning services for all Rhode Island Public Schools, in accordance with the terms of this solicitation and the General Conditions of Purchase (available at www.purchasing.ri.gov).

This is a Request for Proposals, not an Invitation for Bid. Responses will be evaluated on the basis of the relative merits of the proposal, in addition to price; there will be no public opening and reading of responses received by the Division of Purchases pursuant to this Request, other than to name those offerors who have submitted proposals.

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS

Potential offerors are advised to review all sections of this solicitation carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this Request, or to provide oral or written clarification of its content, shall be borne by the offeror. The State assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

Proposals misdirected to other State locations or which are otherwise not present in the Division of Purchases at the time of opening for any cause will be determined to be late and may not be considered. PROPOSALS EMAILED OR FAXED TO THE DIVISION OF PURCHASES WILL NOT BE CONSIDERED. The "Official" time clock is in the reception area of the Division of Purchases.

It is intended that an award pursuant to this Request for Proposals will be made to a prime contractor(s) who will assume responsibility for all aspects of the work. Joint ventures shall be considered, so long as the contractor's duties and responsibilities are clearly articulated in such form as acceptable to the State. Subcontractors are permitted, provided their use is clearly indicated in the offeror's proposal and the subcontractor(s) to be used are identified in the proposal.

All proposals should include the vendor's FEIN or Social Security number as evidenced by a W9, downloadable from the Division's website at www.purchasing.ri.gov.

The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.

In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). *This will be a requirement only of the successful bidder (s).*

Offerors are advised that all materials submitted to the State of Rhode Island for consideration in response to this Request for Proposals will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request, once an award has been made.

Also, Submitters should be aware of the State's MBE requirements, which addresses the State's goal of ten per cent (10%) participation by MBE's in all State procurements. For further information, contact the State MBE Administrator at (401) 574-8253 or Dorinda.keene@doa.ri.gov. Visit the website <http://www.mbe.ri.gov>.

Interested parties are instructed to peruse the Division of Purchases web site on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.

Equal Employment Opportunity (RIGL 28-5.1)

§ 28-5.1-1 Declaration of policy. – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies in all areas where the state dollar is spent, in employment, public service, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via email raymond.lambert@doa.ri.gov.

RIGL 37-13-3.1 State public works contract apprenticeship requirements. * (a) Notwithstanding any laws to the contrary, all general contractors and subcontractors who perform work on any public works contract awarded by the state after passage of this act and valued at one million dollars (\$1,000,000) or more shall employ apprentices required for the performance of the awarded contract. The number of apprentices shall comply with the apprentice to journeyman ratio for each trade approved by the apprenticeship council of the department of labor and training.

BACKGROUND/OVERVIEW

Most children spend a significant part of their lives inside public school buildings, so the condition of those buildings is of great concern to the State of Rhode Island. Aside from the physical safety and well-being of school children and the adults who work in school buildings, it has long been accepted that the condition and design of school buildings has a direct impact on academic performance. As the state strives to prepare its public school students for success in college, careers and life, facilities must be part of the equation.

The Rhode Island Department of Education (RIDE) seeks a Vendor/Consultant that will be utilized to perform educational planning, facilities assessments, create a facilities database, develop a facilities prioritization plan for school improvements in Rhode Island's 300+ public school facilities, develop adequacy standard regulations, and recommend draft School Building Authority Capital Fund regulations. The deliverables sought will be used to prioritize projects to renovate, modernize, and/or reconfigure school buildings under the School Building Authority Capital Fund. The prioritization plan shall be based on the following overarching goals and principles of the School Building Authority Capital Fund:

1. Schools should be safe and secure
2. Schools buildings systems should be operational, safe, and sound
3. Facilities should align with instructional requirements and visions
4. Statewide equity and adequacy

In 2013, RIDE released the [Public Schoolhouse Assessment](#), which evaluated the capacities and building conditions of traditional school districts in Rhode Island to help the Board of Education determine the necessity of school construction and to foster statewide uniformity in school building quality. Based on district reported data, the report estimated that it would cost \$1.8 billion to bring all Rhode Island public school buildings to like new condition.

As a result, the Governor's FY 2016 State Budget created the School Building Authority Capital Fund (SBACF) as part of a multi-stepped process to address equity and adequacy in funding school construction improvements toward providing high quality school facilities for all public school students in Rhode Island. Beginning July 1, 2015, the SBACF will provide equitable funding on a "pay-as-you-go", up front basis to Local Education Agencies (LEAs) through an application process.

In Rhode Island, approved school construction projects are reimbursed by the State through the Housing Aid process using a share ratio, with communities receiving between 35% and 95% reimbursement. In order to receive Housing Aid, districts must complete the multi-stage Necessity of School Construction application process and receive Council on Elementary and Secondary Education (CESE) approval. Once approved projects are completed, districts can submit for Housing Aid reimbursement.

Municipalities' unmet capital needs far exceed the amount of their available bonding capacities and the funding from the SBACF. As such, a prioritization plan is necessary to identify schools with the highest need for capital funding and improvements. The creation of the prioritization plan will serve as a tool for the School Building Authority and School Building Authority Advisory Board, as well as for local communities and school districts. The selected vendor will perform a feasibility study and create a Facility Master Plan for all of Rhode Island public schools (approximately 300), including traditional school districts, career and technical centers, and public charter schools. The Facility Master Plan will include existing facilities conditions, site assessments including utilization rates and demographic data to verify school configurations, and document current uses identifying physical, instructional, and programmatic needs.

The Vendor(s) selected under this solicitation will be subject to the state's General Conditions of Purchase (available at www.purchasing.ri.gov), RIDE's School Construction Regulations (<http://www.ride.ri.gov>), the Northeast Collaborative for High Performing Schools protocol, and the terms of this request.

SCOPE OF THE WORK

The Rhode Island Department of Education (RIDE) is seeking the services of a vendor to lead the development of the prioritization plan that will guide the identification of future projects to renovate, modernize and/or reconfigure school buildings as part of the SBACF. It is the State's intent that:

- a) A review and analysis of a broad range of school-based data, including the Statewide Facilities Assessment and annual Asset Protection Plans, be utilized in the development of various prioritization categories.
- b) A comprehensive database will be developed and refined for strategic decision making relative to prioritization of individual school facility improvements. The database will include the facility conditions analyses, capacity and enrollments, educational program adequacy, project identification, and cost information that is collected per the

deliverables. It will serve as the mechanism by which school facilities are indexed (by grade configuration) to determine the highest need for capital facilities improvements and funding. The tool will be updated regularly as new data is available, and managed by RIDE's School Building Authority.

c) The prioritization plan must document the planning process and provide recommendations including:

1. The vendor will work with the School Building Authority, SBA Advisory Board, and LEA representatives to develop a summary and recommendations.
2. The development of the prioritization tool using data collected and weighting each project to identify the highest need for capital funding and improvements.
3. Index of campuses by school type configurations sorted by high to low need for capital funding and improvements.
4. Framework for identifying opportunities for optimizing utilization of space for all grade configurations including the analysis utilized to determine the specific areas of need at elementary, middle and high schools in each district.
5. The plan will be developed in coordination with the School Building Authority, presented periodically to the School Building Authority Advisory Board, and adopted by the CESE so that it may be utilized to develop/define projects that will be funded by the SBACF.

e) The School Building Authority (SBA), within RIDE, will serve as the program coordinator and will be the point of contact during the prioritization planning process and development. The Vendor shall keep the designated point of contact informed of all activities, information, and Review Committee engagement, both formal and informal. The Vendor shall work closely with District representatives throughout the prioritization planning process and development. The Vendor shall engage the District representatives as an integral part of the prioritization planning team. The Vendor shall expect and respectfully consider feedback, planning expertise and detailed input from Districts and the SBA throughout the prioritization planning process, especially during analytical tasks, preparation of presentation materials, reports, and the draft and final plan.

Requirements

The vendor should have experience and/or knowledge of:

- Collecting and Reporting Facility Condition Assessment Data
- Analyzing Facility Condition Assessment Data
- Analyzing Enrollment Projection Data
- Developing Programs of Requirements

- 21st Century Learning Environments
- Student Centered Learning Environments
- Performing Educational Master Planning
- Facilitating Educational Planning Charrettes
- Leading Educational Visioning Workshops
- RIDE's School Construction Regulations

The vendor shall provide their own office space, supplies, equipment, and software (including, but not limited to Geographical Information Software (GIS)) required to satisfactorily perform the following tasks:

Task 1: Conduct Facility Analysis

The Facility Analysis should list all deficiencies for districts' existing buildings. Because these are locally owned and operated facilities, the vendor must coordinate with each district to receive permission, schedule walkthroughs, and prepare a project plan that meets this RFP's timeline. Draft reports and progress will also be shared with districts. Districts will be grouped, as determined by facility condition ratings in the Schoolhouse Assessment, and reviewed in this order. Facility Analyses of completed districts will be submitted to RIDE on a monthly basis as they are completed. Approximately half of the schools must be completed by December, 2015.

Task 1 (A): Facility Conditions

The Facility Analysis must be conducted by licensed professionals (architects, structural engineers, traffic engineers, site/civil engineers, landscape architect, HVAC engineer, hydrologist/environmentalist, electrical engineer, fire protection engineer, sustainability consultant, plumbing engineer, technology engineer, security consultant, energy modeler/auditor, acoustical engineer, and hazardous materials engineer) and must include:

- Inspection and analysis of the building envelope (roof, walls, glazing, foundation, floor/slab)
- Inspection and analysis of the structural elements of the facility
- Inspection and analysis of all mechanical systems, including condition, age, energy efficiency, levels of ventilation, and compliance with American Society of Heating, Refrigerating, and Air Conditioning Engineers (ASHRAE) standards
- Inspection and analysis of the lighting/electrical system, including condition, age, energy efficiency and lighting levels
- Inspection and analysis of all controls including lighting controls and sensors, energy management systems, emergency shutoffs
- Inspection and analysis of all fire, safety and security systems including emergency plans
- Inspection and analysis of traffic, site, and landscaping
- Inspection and analysis of technology infrastructure
- Inspection and analysis of acoustical
- Inspection and analysis of potential hazardous materials (asbestos, lead, pcps)

Task 1 (B): Educational Program Assessment

Design and Educational Program means a comprehensive numerical and written description of a district's specific educational program for a specified number of students over a specified period of time, in a format prescribed by the School Building Authority. It shall include:

- An itemization of spaces needed to support the educational program, complete to the degree that a designer may use it as the basic document from which to create the design of a school facility;
- The instructional programs, grade configuration, type of facility, and the spatial relationships for the functions housed at the facility;
- The number of students and a list of any specialized classrooms or major support areas, non-instructional support areas, or external activity spaces;
- Gross and net square footage of any affected existing facility;
- The overall security and security measures taken to safeguard the facility and its occupants;
- The school administrative organization; and
- The hours of operation that include the instructional day, extracurricular activities, and any public access.
- Outdoor program, parking, athletic and physical education, and bus/parent drop off

The Design and Educational Program shall begin with a thorough, in-depth explanation of curriculum goals and instructional activities that occur within the learning environment of the facility affected by the proposed project. The Design and Educational Program shall comply with all applicable laws and applicable CESE and RIDE regulations, including but not limited to, those governing curriculum, basic education program, and length of school day and year. The Design and Educational Program for the proposed project shall include an itemization of each functional space and determination of square footage allocations, a calculation of total building square footage, establish a realistic construction budget, and align with RIDE's 2020 strategic plan.

The assessment must also include:

- Educational Framework
- Enrollment projections
- District and building level capacity
- Consideration of school district or school facility consolidation pursuant to Section 1.05-4 of the SCR
- Analysis of historic implications and comments from the RI Historical Preservation and Heritage Commission, if applicable.
- Traffic/Transportation Impact Plan pursuant to Section 1.05-7 of the SCR

Task 1(C) Energy Assessment

- Preliminary energy analysis or modeling
- Feasibility of using renewable energy technologies
- Analysis of the energy use (electric and heating and/or cooling) of the facility for at least the last two years, a survey of the facility systems, and recommendations for improving energy efficiency. The use of Energy Star Portfolio Manager will be used to benchmark the facility against other buildings in coordination with the RI Public Energy Partnership at the RI Office of Energy Resources

The facility analysis reports must be organized by school and grouped by district, including each of the tasks listed above.

Task 2: Data Analysis, Recommendations, and Development of Adequacy Standard Regulations

Based on the information from the facility analyses, and other information provided by SBA, provide an analysis and recommendations in preparation for the planning and prioritization process. Various school-based data such as capacity, enrollment, previous expenditures, facility condition and adequacy, and socio-economic factors shall be embedded in a database with the prioritization tool. The tool should also be able to present each school's proximity to highways, power lines, train tracks, and contaminated land. Additionally, Facility Analyses documents for each school shall contain identification of relevant school based needs. The Vendor shall review the data contained within the prioritization tool, as well as other relevant information from the Facility Analyses for use in the development of a prioritization strategy and plan. The Consultant shall make recommendations to SBA to collect additional data or provide data in an alternate format, if necessary and feasible, as determined by SBA. The task therefore includes the analysis of existing and any future proposed data by the Consultant.

In coordination with the SBA, provide information as requested in order that the SBA may aggregate, record, maintain, analyze and report relevant data, including the products of GIS mapping efforts. The information should be organized so SBA personnel can update, maintain, analyze and map data going forward.

The Vendor shall also analyze each districts' current asset protection plans against the data collected to establish a framework for assessing the adequacy of each districts' plan.

The Vendor shall draft Statewide Adequacy Standards Regulations that establish a baseline for school building conditions, maintenance, and operation to meet current demands as required by statute, code, regulation, and the appropriate sections of the Basic Education Program Regulations. The regulations shall ensure that facilities have adequate space with respect to student enrollment, the instructional program, and necessary administrative and supporting services. The spaces within each building

should also be sufficiently flexible to provide for multiple uses of the area in the overall educational and activity programs. The As such:

- Each classroom or laboratory shall be adequate to serve the specific purpose for which it is intended and shall have sufficient area to accommodate each student.
- Each school shall maintain a designated area that affords access to library-media resources, as appropriate to the age of students in the school.
- Storage space, such as a safe-designated area, shall be provided so that materials and equipment may be securely stored in a space other than in student instructional areas.
- Storage of hazardous materials shall be in accordance with OSHA requirements.

The goals of these standards are to:

- Ensure safe school facilities and high performing learning environments for students and staff.
- Create and maintain safe school facilities and stimulating learning environments to support student achievement.
- Ensure every school has the resources and capacity to operate and maintain a safe and effective physical plant that supports district goals of learning and teaching.
- Develop and implement programs and procedures for ensuring the health and well-being of all students.
- Develop and implement data-driven and research-based programs for addressing physical needs of students that are affecting their academic performance.

Task 3: GIS Mapping/School Building Authority Website

The Vendor shall provide GIS Mapping of data to illustrate condition, construction in progress, recently completed projects, excess capacity, and statistical information (including information from the data tool referenced in task 2) for use in decision making, presentations, and reporting in support of the development of the Prioritization Plan.

Additionally, the Vendor shall create a website (hosted by RIDE) that is compatible with RIDE's website interface that will host the GIS mapping as well as other School Building Authority features such as regulations, completed projects, background information, etc... The website should be similar to other exemplars such as used by the [Ohio Facilities Construction Commission](#), [Massachusetts School Building Authority](#), and [California's Office of Public School Construction](#).

Task 4: Prioritization Tool to Determine Schools with the Highest Need

The Vendor shall create a prioritization tool and provide support for further development and refinement of the system to incorporate prioritization strategies in determining the schools with the highest need. Furthermore, the Consultant shall develop an analytical framework to index schools with the highest need and provide insight and education facility expertise in the development of prioritization strategies.

The framework shall be based on clear metrics that include, but are not limited to capacity needs, safety, adequacy and condition. The Consultant shall develop models from the prioritization tool, utilizing data collected, to test and validate that prioritization ranking for school types are in alignment with SBA guiding principles and goals.

The vendor should prepare an impact analysis of adequacy standards and collected data to access scope, costs, and timeline to bring all school facilities to the standard.

Task 5: Prepare a draft and final School Building Authority Facilities Prioritization Plan

The Consultant shall prepare a draft report including a summary of the planning process, facility analyses results, presentation materials, School Building Authority Capital Fund Regulations, and a preliminary prioritization plan. The Consultant shall compile the feedback from districts and the School Building Authority Advisory Board and edit the final document based on the feedback provided with coordination from the SBA. With RIDE and LEA concurrence, the consultant shall prepare and publish the Draft School Building Authority Facilities Renovation/Modernization/ Reconfiguration Prioritization Plan.

The Consultant shall help draft School Building Authority Capital Fund Regulations, consistent with statute, including but not limited to analyzing the existing process through which a city, town, or LEA may submit an application for School Building Authority Capital Funding and delineate the type and amounts of additional housing aid incentive points.

The Consultant shall publish the final document in formats for RIDE use including electronic and editable versions. RIDE will require printed soft-bound copies including as a minimum graphics comparable to those used in the Public Schoolhouse Assessment (quantity to be determined). The Consultant shall be prepared to provide all data files and electronic copies of all materials, reports, meeting minutes, charts, maps, presentations and the draft and final plans to RIDE as requested.

Deliverables

The vendor shall perform the activities required to successfully complete the requirements listed above. An implementation schedule and delivery timeline shall be included in prospective bidder's proposals.

The following is a list of the expected deliverables that will support the prioritization plan:

1. Facilities Analysis for every Rhode Island Public Schools (approximately 300)
2. Analysis and Recommendations Database
3. Draft Adequacy Standards Recommendations
4. Final Development of a School Facility Database with Prioritization Tool
5. Draft and Final Publication of the Prioritization Plan
6. Draft School Building Authority Capital Fund Regulations

7. GIS Mapping/Website

In general, applicants must have excellent written and oral communications skills; the ability to interact effectively with a wide variety of constituencies. Respondents must also be able to cope with a high degree of variety of work, manage complex and demanding activities, meet agreed-upon timelines, and work independently.

Applicants must have extensive experience conducting facility master plans for K-12 school districts. Applicants must also have the staffing capacity to conduct multiple district master plans simultaneously and meet all timelines.

The successful respondent shall be solely responsible for meeting all terms and conditions specified in the Request for Proposal and any resulting contract. The Rhode Island Department of Administration shall reserve the right to clarify terms and conditions of any proposal submitted. The respondent recommended for this award will be notified by the Department of Administration.

PROJECT SCHEDULE

Tentative Contract Award: Fall 2015

Schedule and Conduct Facilities Assessments*: Fall 2015 through March 2016 Develop Prioritization Tool: March 2016

Draft Prioritization Plan: June 2016

Final Prioritization Plan: September 2016

*Highest Priority Facility Assessments **must be completed by December 2015**

The vendor is expected to meet regularly (in person, conference call, or web-based) with RIDE. The project schedule and meeting schedule will be finalized before contract execution.

Terms of the Agreement

The Contract will begin upon issuance of a state purchase order (on or about fall 2015) and end June 30, 2017. The State retains the option of granting a time extension of up to 12 months with additional funding if available and if the level of work is expanded by mutual written consent. If necessary, deficiencies in performance of services and/or failure to supply deliverables in a complete and timely manner will be documented in writing by RIDE. Should a pattern of substantial dissatisfaction become apparent, RIDE reserves the right to terminate the contract.

Pre-Proposal Meeting

A Pre-Proposal Meeting will be held on the date and time listed on the cover sheet of this solicitation at the **Department of Administration, Division of Purchases Bid Room (2nd Floor), One Capitol Hill, Providence, RI**. At this time all questions relative to the SOW as well as any questions regarding RIDE procedures and proposal format will be addressed. Persons requesting the services of an interpreter for the

hearing impaired may obtain those services by calling (401) 222-4971 forty-eight hours in advance of the scheduled conference date. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

PROPOSAL SUBMISSION

Questions concerning this solicitation may be e-mailed to the Division of Purchases at the address on the cover sheet of this solicitation and no later than the date & time listed. **Send your questions in Microsoft Word format.** Please reference the RFP# on all correspondence. Questions received, if any, will be posted and answered on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. For computer technical assistance, call the help desk at (401) 222-3766 or Lynda.moore@doit.ri.gov.

Proposals (an original plus 4 copies) should include the following:

1. A completed and signed three-page RIVIP Bidder Certification Cover Form, available at www.purchasing.ri.gov.
2. A ***separate sealed*** Cost Proposal as described above.
3. A *separate* Technical Proposal (see below) describing the qualifications and background of the applicant and experience with similar programs, as well as the work plan or approach proposed for this requirement.
4. A completed and signed W-9 (taxpayer identification number and certification). Form is downloadable at www.purchasing.ri.gov.

Deliver to: Department of Administration
Office of Purchases
One Capitol Hill
Providence, Rhode Island 02908

5. In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in electronic format (CD-Rom, disc, or flash drive). Microsoft Word / Excel or .pdf format is preferable. Only 1 electronic copy is requested and it should be placed in the proposal marked "original."

Contractor assumes all responsibilities for proposals submitted by mail or commercial delivery service. Proposals misdirected to other state locations or which are otherwise not present in the Office of Purchases at the time of opening, for any cause, will be determined to be late and will not be considered. Faxed responses will not be considered.

TECHNICAL PROPOSAL REQUIRED ELEMENTS / EVALUATION CRITERIA

- | | |
|--|-------------|
| 1. Facilities and Planning Expertise and Experience | (20 points) |
| 2. Proposed Project Team & Organizational Capacity | (20 points) |
| 3. Project Plan, Methodology, Schedule, and Approach | (30 points) |
| 4. Cost Proposal | (30 points) |

Bidders must demonstrate their qualifications to provide the required products and services providing responses to the following items. Bidders may provide additional information if needed for a full and complete response; however, proposals should be no more than 40 pages in length excluding appendices.

A Selection Committee will evaluate submitted proposals on the basis of the above criteria items. Consultant Teams may be invited to appear before the Committee for in-person presentations. The Committee will then make a qualifications based recommendation for final selection to the Rhode Island State Purchasing Agent, or her designee, who will make the final award decision.

To advance to the cost evaluation phase, the technical proposal must receive a minimum of 55 out of a maximum of 70 technical points. Any technical proposals scoring less than 55 points will not have the cost proposals opened and evaluated. The proposal will be dropped from further consideration.

Proposals scoring 55 technical points or higher will be evaluated for cost and assigned up to a maximum of 30 points in the cost category, bringing the potential maximum score to 100 points.

Facilities and Planning Expertise and Experience (20 points)

Responses will be evaluated on the vendor's specific expertise of a proven track record of experience with conducting facility master plans and the development of prioritization plans of the scale and scope as proposed.

- Describe your general experience as well as experience and qualifications with projects of similar size, scope and use. Identify the Project Manager, other consultants as well as other members of the project team.
- Provide examples of projects undertaken of comparable size
- Provide sample work products, and underlying analysis that supports Facilities Master and Strategic Planning.
- Provide a list of previous contracts for which similar work was performed within the last five (5) years. Include the name of client, title and description of

planning effort, contract dollar amount and period of performance Include the name of the contact person, their title, telephone number and email address. RIDE reserves the right to contact these previous clients for references.

Proposed Project Team & Organizational Capacity (20 points)

Responses will be evaluated on the specific skill sets of the proposed project team including how well their individual qualifications and experience relate to this project.

- Provide a brief summary of the history, goals, and key achievements of you/your organization related to the purpose and priorities of this solicitation.
- Submit an organizational chart if one is available. Provide a summary of you/your organization's overall budget and describe you/your organization's capacity to manage projects.
- Provide resumes and qualifications for all team members indicating key or primary roles. Provide list of team members or subcontractors with website design experience, GIS expertise, document publication, and regulatory documentation experience. If any proposed team members are subcontractors or not directly employed by the respondent, please explain the relationship and history of professional services to the respondent.
- Provide a list of all team members or subcontractors that are Recognized Educational Facility Planners and/or Certified Educational Facility Planners. Current workload and written commitment to meet the proposed time schedule

Project Plan, Methodology, Schedule, and Approach (30 points)

Responses will be evaluated based on the completeness of the proposed methodology and its match to the Requirements and Tasks. A proposed work plan and timeline shall be included. The methodology and approach, schedule, and level of effort in support of the work plan shall provide a clear understanding of the nature of the work to be undertaken. Respondent shall describe the activities and methodologies that will be used to accomplish the work in an effective and timely manner. Potential risks and sensitive areas specific to the successful completion of the School Building Authority Facilities Renovation/Modernization/Reconfiguration Prioritization Plan shall be outlined in this section. Provide suggested risk mitigations for the challenges identified in the proposal.

A. Methodology and Approach: This evaluation criterion considers the methodology proposed for the task, including task plan and management, and proposed deliverables. The methodology should demonstrate how the respondent intends to complete the School Building Authority Facilities Renovation/Modernization/Reconfiguration Prioritization Plan and all deliverables successfully within the desired timeframes.

B. Schedule: This evaluation criterion considers the proposed schedule. Respondent shall provide a detailed schedule including timeframes for major tasks such as Independent Review Committee engagement, review and analysis,

and document development. If the proposed schedule for any deliverable deviates from the RIDE's proposed schedule, please indicate where and why your proposed schedule would be more effective.

C. Level of Effort: Define recommended effort for each Requirement and Task for the methodology and schedule in the proposal. The level of effort shall reflect a proposed staffing plan and the proposed hours devoted to each task.

COST PROPOSAL (30 POINTS) (APPENDIX A)

The fee proposal submittal will be a Lump Sum by Task (reference Requirements section of RFP), inclusive of all costs. Each Task should be clearly listed in the format prescribed in Appendix A and priced separately, allowing RIDE to select, combine, or reject tasks at the State's discretion. The lump sum fee shall not be adjusted for any reason including variation of bid price from budget estimates, change orders, subcontractors, nor for extended duration of the project. Upon contract acceptance and issuance of a purchase order, the vendor is responsible for delivering the selected Tasks and associated deliverables to RIDE.

Please note that reimbursement for travel within the continental United States will be limited to the per diem rates established by the General Services Administration (GSA). Per diem rates are posted at www.gsa.gov/perdiem.

Notwithstanding the above, the State reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all responses, and to award in its best interest.

Responses found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further. The State reserves the right to reject any or all responses submitted and to waive any informalities in any vendor's submission.

The contract agreement resulting from this award will include all provisions outlined in Title 2 of the Code of Federal Regulations, Chapter 2, Appendix II to Part 200.

Resolution of Bid Protests will be resolved in accordance with Section 1.6 of the State of Rhode Island Procurement Regulations.

END

Appendix A
Cost Proposal Format

Task 1a: _____
Task 1b: _____
Task 1c: _____

Total Price for Task 1 _____

Total Price for Task 2 _____

Total Price for Task 3 _____

Total Price for Task 4 _____

Total Price for Task 5 _____

Grand Total for all tasks listed above* _____

*Grand Total should include an allowance equal to 0.5% of the sum of the task prices listed above to assist RIDE upon requests, in the event of any delays to the schedule or additional scope of work not listed herein.

Provide an Annual Website/GIS Maintenance/Service Fee _____