



**Solicitation Information**  
28 Feb 05

**RFP #B04833**

**TITLE: Program Management Services –Campus Development**

**Submission Deadline: 23 March 05 @ 1:40 PM**

<b>PRE-PROPOSAL CONFERENCE: <u>Yes</u> DATE: 9 March 05 TIME: 1:00 PM</b> <b>Mandatory : <u>YES</u></b> <b>Location: Library Building (Galanti Lounge), University of Rhode Island, Kingston, RI</b>
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Questions concerning this solicitation may also be e-mailed to the Division of Purchases at [questions@purchasing.state.ri.us](mailto:questions@purchasing.state.ri.us) no later than **7 March 05 at 12:00 Noon (EST)**. 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.

<b>SURETY REQUIRED: YES</b> (in the amount of \$200,000) <b>BOND REQUIRED: NO</b>
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**Jerome D. Moynihan, C.P.M., CPPO**  
**Administrator of Purchasing Systems**

**Vendors must register on-line at the State Purchasing Website at [www.purchasing.state.ri.us](http://www.purchasing.state.ri.us) to be able to download a Bidder Certification Cover form which must accompany each offer.**

**NOTE TO VENDORS:**

No offer will be considered that is not accompanied by a completed and signed RIVIP generated Bidder Certification Cover Form.

**THIS PAGE IS NOT A BIDDER CERTIFICATION FORM**

REQUEST FOR PROPOSALS TO PROCURE  
PROGRAM MANAGEMENT FOR THE  
NORTH DISTRICT CAMPUS DEVELOPMENT PROJECT

Proposals are hereby solicited by The Department of Administration /Division of Purchases, on behalf of the University of Rhode Island (URI) and must be received at the Division of Purchases, One Capitol Hill, Providence, RI 02908-5855, on or before 23 March 05 @ 1:40 PM (EST), from qualified firms interested in providing comprehensive Program Management Services to assist the University in the development its program as described elsewhere herein, in accordance with the terms of this Invitation and the State's General Conditions of Purchase (available at [www.purchasing.state.ri.us/publicdocuments/gencond.pdf](http://www.purchasing.state.ri.us/publicdocuments/gencond.pdf) ).

The project includes demolition, construction and/or renovation of buildings on the University of Rhode Island (URI) Kingston Campus, with associated utility and site development, in accordance with the Master Plan. The Program Manager, under the direction of the University's Office of Capital Projects and Facilities Planning, will provide overall supervision and direction to architects, engineers, contractors, planners, consultants and others to accomplish implementation of the North District Campus Plan, which can be viewed at [www.uri.edu/pspd/planserv/masterplan](http://www.uri.edu/pspd/planserv/masterplan). Architectural programs that have been completed for individual buildings included in the District can be viewed during normal office hours at the URI Office of Capital Projects and Facilities Planning, 523 Plains Road, Sherman Building, Kingston, RI 02881. Call ahead at 874-2725 to schedule an appointment.

This is a Request for Proposals (RFP), not an Invitation for Bid; responses will be evaluated on the basis of the relative merits of the Proposal. 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.

Scope of work for this project may be obtained through Internet access to Rhode Island Division of Purchases home page at [www.purchasing.state.ri.us](http://www.purchasing.state.ri.us) . Respondents are advised that they must download and submit the three page Bidder Certification Cover Form with their submittal.

An original Proposal plus eight (8) copies are required, including all the information described elsewhere in this solicitation. The State reserves the right to make an award or to reject any and all proposals based on what it considers to be in its best interest.

Evaluation of the proposals will include consideration of competence and general experience to provide the required services; experience and qualifications of personnel; availability of personnel, equipment and facilities to perform expeditiously; past performance with respect to control of costs, quality of work, ability to meet deadlines; and the submittal of a formal work plan.

A *mandatory* site conference will be held at the date and time listed on page one of this solicitation.

**Agency Contact:** Paul M. DePace, P.E. (401) 874-2725  
Director  
U.R.I. -Office of Capital Projects and Facilities Planning

**Note: Attendees may call ahead to the Visitor's Center at 874-2133 to determine whether you may use personal conveyance or be required to use the University's shuttle service. Attendees should plan to arrive at the Visitor's Center at least twenty minutes before the conference is scheduled to begin.**

Individuals requesting services for the hearing impaired must notify 48 hours in advance of the conference date at (401) 874-2725.

#### INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

Potential offerors are advised to review all sections of this RFP 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 RFP will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this RFP, 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 ninety (90) 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 will not be considered. For the purposes of this requirement, the official time and date shall be that of the time clock in the reception area of the Division of Purchases. Proposals emailed or faxed to the Division of Purchases will not be accepted.

It is intended that an award pursuant to this RFP will be made to a prime contractor, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered, but subcontracts are permitted provided that their use is clearly indicated in the offeror's proposal and the subcontractors proposed to be used are identified in the proposal.

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

In accordance with Title 7, Chapter 1.1 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, 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's Office (401 222-3040). This Certificate of Authority will be required prior to the issuance of a purchase order. *This is a requirement only of the successful vendor.*

The State of Rhode Island has a goal of ten per cent (10%) participation by MBE's in all State procurements. For further information, visit the web site [www.rimbe.org](http://www.rimbe.org). To speak with an M.B.E. Officer, call (401) 222-6253.

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 / LOI

## SECTION 2 - BACKGROUND AND PURPOSE

URI is planning a major new development in the section of its Kingston, Rhode Island facility referred to as the "North District". The University has retained William McDonough + Partners to produce a plan of the North District Campus including the siting and massing of future buildings in that district. The North District Campus Plan builds upon the strategies of the recent Kingston Campus Master Plan and is the next phase of planning toward implementation of the University's vision of a Sustainable Community. This overall project is expected to include development of four new initiatives and renovation of one existing building, with associated site development, but may include more or fewer, depending on the results of approvals by the Board of Governors for Higher Education, the legislature, bond referenda, programs, fund raising and other factors influencing capital planning decisions at the University. The goal of this series of projects is to develop and maintain the principles of sustainable design throughout the project with an initial target of Leed Silver.

**THE BIOLOGICAL SCIENCES CENTER** is an existing 60,000 sq. ft. biological laboratory and teaching facility constructed in 1972. The unorthodox cast concrete structure includes three pentagon-shaped "rings" housing laboratories, offices, and classrooms on a single floor below ground level with an above-grade elliptical auditorium. It was originally designed to support additional construction, including 2-story and 5-story office and laboratory complexes. The solid concrete roof surface failed in the 1980's and was rebuilt with a ballasted membrane roof, which has again deteriorated. The auditorium roof was replaced in 1998. This component of the project includes the complete rehabilitation of the Biological Sciences Center, including interior spaces, HVAC systems, and building envelop to support the current teaching and research program as well as the continued development of the Environmental Biotechnology Initiative. Laboratory, animal care and office spaces will be fully upgraded. The University has selected Payette and Associates of Boston to furnish preliminary design services to assist the University in securing funding. Primary funding is

through state general obligation bond issue approved on the ballot in November 2004. The project is scheduled for occupancy in 2008.

**THE CENTER FOR BIOTECHNOLOGY AND LIFE SCIENCES** is a 100,000 sq. ft. new structure that would provide office, classroom and laboratory space for the Environmental Biotechnology Initiative with associated academic department personnel and faculty. The facility will train scientists and engineers to support the biotechnology industry, house cutting-edge biotechnology research that has the potential to be commercialized, and provide technology incubator space. Faculty and staff for Biochemistry, Cellular and Molecular Biology (CMB), Plant Sciences (PLS), Biology (BIO), Fisheries, Animal and Veterinary Science (FAVS) will be housed in this facility, supporting programs in DNA sequencing, functional genomics, transgenics, imaging, bioinformatics and pilot manufacturing. Space will be provided for a new faculty and their programs, for new hires, and for those temporarily resident while obtaining or providing specialized training to expand individual skills and organizational productivity. The University has selected Payette and Associates of Boston who has furnished preliminary design services to assist the University in securing funding. Primary funding is through state general obligation bond issue approved on the ballot in November 2004. The project is scheduled for occupancy in 2008.

The University expects to develop the Biological Science Center and the Center for Biotechnology and Life Sciences as a single project with a total project cost of \$50,000,000

**THE COLLEGE OF PHARMACY** is an approximate 100,000 gross sq. ft. new facility to house the URI College of Pharmacy. The facility will house College teaching laboratories, research laboratories, classrooms, faculty, staff and administrative offices and outreach programs. A preliminary program has been prepared by William McDonough + Partners. The University is currently reviewing proposals from architects interested in this assignment. The University has selected Payette and Associates of Boston to furnish preliminary design services to assist the University in securing funding. Primary funding is expected to include private donations, Federal health sciences initiatives, university allocations, and future State bond referenda. No budget has yet been established for this project. The project is proposed for occupancy in 2010.

## **THE NORTH DISTRICT**

For further North District development, the University is considering development of a possible new sciences building consisting of Chemistry, Physics and Chemical Engineering, and a possible new Allied Health Sciences Building.

A major thrust of the North District Campus Plan involves demonstration of the use of Sustainable Community principles in the development of major facility projects. The University has engaged the world renown firm of William McDonough + Partners to prepare a master plan for the North District to define these principles and to ensure that these principles are held as primary goals throughout development of the District.

The Program Manager will assist the University by taking the lead in managing its consultants and contractors in the identification and implementation of Sustainable Community principles in each of the projects. The University has set a initial goal of LEED Silver.

Due to the scope and diversity of skills required to implement the North District Campus Plan, URI has elected to retain an experienced Program Management firm in lieu of hiring additional staff. The Program Manager will work directly for the Office of Capital Projects and Facilities Planning, but because of the breadth of responsibilities may also be required to interface directly with the Deans and faculty of the College of Arts and Sciences, College of Environment and Life Sciences, College of Pharmacy and with staff of Administration, University Communications, Development, Safety and Risk Management, Facilities Services, Office of Higher Education, State Division of Purchases, State Building Code Commission, State Fire Marshall, and other academic and business units of the University and the State.

## **PARKING AND UTILITIES**

This project must replace any existing parking space eliminated by any construction. The program must plan and implement the expansion and improvements of campus utilities and roadways to service these facilities.

### **SECTION 3 - SCOPE OF WORK**

#### **3.1 GENERAL DESCRIPTION**

The University of Rhode Island is interested in hiring an experienced Program Manager (PM) to manage all aspects of management, design, construction, commissioning and placing into operation the Center for Biotechnology and Life Sciences and assist with the planning of the overall utilities planning and advance and estimating planning for the New Pharmacy, New Science and Allied Health Buildings on the University of Rhode Island Kingston Campus. The University, at its sole discretion, reserves the right to extend the P.M. agreement to furnish additional services to develop and construct the New Pharmacy, New Science and Allied Health Buildings.

The PM will report directly to the University's Office of Capital Projects and Facilities Planning and augment that department's staff.

A PM will be engaged by the University to assist with: 1) management of architect, engineers, commissioning agents and other consultants to be contracted by the University, 2) preparation and management of schedule 3) coordination planning of site utilities, parking and traffic associated with this project as it relates to the other projects in the North District, 4) selection of delivery systems, 5) value engineering and design review of the work, 6) bidding of multiple construction bid package contracts to be held by the University, 7) management and quality control of construction, 8) building commissioning and 9) selected post construction services. The PM shall provide all personnel, materials, tools, and equipment to provide services in accordance with this Scope of Work including, but not limited to, onsite office space, equipment, and support, and computer hardware and software, and all appropriate insurance.

The Program Manager will not be allowed to self perform any portion of the work during the construction phase.

### 3.2 ABBREVIATIONS

ADA	Americans with Disabilities Act
CM	Construction Manager
CPM	Critical Path Method of projects scheduling
DBE	Disadvantaged Business Enterprise
DEM	Rhode Island Department of Environmental Management
EEO	Equal Employment Opportunity
MBE	Minority Business Enterprise
O&M	Operations and Maintenance
PM	Program Manager
RFI	Request for Information.
RFP	Request for Proposals
RISBCC	RI State Building Code Commission Office
URI	The University of Rhode Island
WBE	Women's Business Enterprise
OCP& FP	Office of Capital Projects and Facilities Planning
FS	Facility Services
S&RM	Office of Safety and Risk Management
SFM	State Fire Marshall

### 3.3 SITE EVALUATION ANALYSIS

#### The Program Manager shall:

1. Conduct, coordinate and oversee site investigation and evaluation.
2. Coordinate the development of site utilities to conform with the North District Plan as directed by the University.
3. Advise the cost impact of implementing recommendations regarding environmental issues.
4. Advise the cost impact of relocating or reconstructing displaced utilities and facilities.
5. Present report and recommendations to the University

### 3.4 TRAFFIC STUDY

#### The Program Manager shall:

1. Cooperate with the Architect in their responsibility to perform a study of parking areas for the new facilities.
2. Cooperate with the Architect to determine the appropriate number of parking spaces for the new facilities. Advise the cost impact to construct the recommended number of new spaces.
3. In conjunction with URI, the Town of South Kingstown and the RI Department of Transportation, cooperate with the Architect in their responsibility to perform a traffic

study of the local access roads and the impact of vehicular traffic generated by the new facilities.

4. Coordinate and cooperate with the Architects and other consultants in their responsibility to perform an analysis of potential sites and vehicular traffic impact.

### 3.5 PLANNING AND DESIGN PHASE MANAGEMENT

The Program Manager shall:

1. In conjunction with URI's Architect, oversee the development and implementation of the North District Campus long range facilities plan to meet the needs of the University including, providing information on project scope, cost, feasibility and assessment of need for modification or construction of other facilities.
2. Identify requirements and timing for third party vendor services. Provide recommendations to URI. Coordinate the work of these consultants; monitor contract performance with regard to scope of work, budget and schedule, and review and recommend approval for progress payments.
3. Assist in the selection, hiring and contract approval of professional firms and specialty consultants, including but not limited to the following:
  - a. Architect
  - b. Engineers
  - c. Planners
  - d. Facilities Management Consultants
  - e. Traffic Engineers
  - f. Trade Contractors
  - g. Master Plan Consultants
  - h. Site Surveyors
  - i. Geotechnical Engineers
  - j. Environmental Engineers
  - k. Appraisers
  - l. Legal Professionals
  - m. Equipment/Furnishing Consultants
  - n. Materials Testing Labs
  - o. Testing and Balancing Contractors
  - p. Hazardous Materials Consultants
  - q. Hazardous Materials Removal Contractors
  - r. Telecommunications and Data Consultants
  - s. Commissioning Agent
  - t. Archeological Consultants
4. When requested by URI, select and contract for these third party professional firms and specialty consultants directly, subject to reimbursement of contract costs by URI.
5. Assist and direct the work of each architectural firm in connection with URI standards and requirements.

6. Review and evaluate the building program and design at all major stages of design. Coordinate URI needs with architects, engineers and special consultants, where applicable, for issues including but not limited to:
  - a. program,
  - b. technology,
  - c. security,
  - d. parking and traffic,
  - e. maintenance,
  - f. food service,
  - g. ADA requirements,
  - h. URI standards and requirements,
  - i. building systems,
  - j. phasing,
  - k. furniture, fixtures and equipment,
  - l. pre-purchase equipment specifications,
  - m. utilities relocation and expansion
  - n. temporary relocation of facilities
  - o. schedule

Monitor compliance of design consultants with instructions issued.

7. Direct the architects, and the subsequent construction contractors, in the design and implementation of a Building Automation Systems (BAS), which will interface seamlessly with URI's master Control System. BAS are to be specified, designed and installed so that they report to the URI's master system and respond to instructions from the master system in all particulars, implementing all features of the system desired by URI.
8. Direct the architects, and the subsequent construction contractors, in the design and implementation of the University's electronic access control system in all facilities constructed under this contract. Program locations for the various electronic access control hardware types with facility users and oversee implementation of the security plan. Coordinate the collection and registration of authorization data for facility users so that, at the time of turnover to URI, the electronic master access control system is fully functional.
9. Direct the architects, and the subsequent construction contractors, in the design and implementation of data and telecommunications systems in full compliance with the specification and configuration requirements of URI's RAMTel telephone/data utility.
10. Direct the architects, and the subsequent construction contractors, in the design and implementation of fire protection alarm systems in full compliance with the specification and configuration requirements of URI's Office of Safety and Risk Management and all applicable local, state and federal codes.

11. Direct the architects, and the subsequent construction contractors in the design and implementation of appropriate signage and graphic systems for the facilities, in accordance with the University master signage and graphics standards, including donor recognition systems.
12. Direct the architects, and the subsequent construction contractors in the design and implementation of site fixtures and furnishings in accordance with the University Campus Master Plan.
13. Provide detailed construction cost estimates at each of the major design stages of each project: Program/Concept, Schematic, Design Development and Construction Documents, in accordance with ASTM E1557.
14. Identify areas for value engineering services and life cycle costing studies and provide detailed review in these areas. Facilitate a value engineering workshop at completion of Schematic Design of each project with representatives from URI, the architect, the engineers, Office of Capital Projects and Facilities Planning, Facility Services, facility users and the program manager in accordance with the method of ASTM 1699, and prepare a detailed report outlining recommended design modifications for consideration by the Building Committee.
15. Develop and maintain a master schedule for all studies and projects. Update the master schedule on a monthly basis, as a minimum.
  - a. Prepare, submit for approval by URI, and then track performance against master schedule for all projects.
  - b. The master schedule must include all design and review activities, all design deliverables, all permit and approval activities, all procurement activities, major construction milestones and commissioning and occupancy activities for each of the buildings in the Project.
  - c. Plan project phasing to minimize disruption of current operations.
  - d. Evaluate project phasing and the need to relocate existing operations.
  - e. Advise on long lead-time procurements.
16. Develop a master project budget and maintain budget vs. actual reports for all projects. Provide budget reporting at the levels of detail necessary to the task—detailed reporting for the Building Committees and the Office of Capital Projects and Facilities Planning and summary level reporting for others. Specifically provide budget data and cash flow projections by fiscal quarter in the format utilized by the State of Rhode Island and the URI capital budgeting and capital management systems.
  - a. Assist in developing preliminary project budget including construction cost estimates
  - b. Review, track and submit for approval to URI and the project budget current status, projected status and budgeted vs. actual costs for all projects.
  - c. Develop and maintain project cash flow projections by contract and major cost category by quarter for all projects.
  - d. Supply budget and cash flow data in formats required by the University Office of Capital Projects and Facilities Planning, University Budget Office and State Budget and Legislative Offices' capital budgeting and capital management systems.

17. Identify opportunities for MBE/WBE/DBE participation in accordance with State of Rhode Island requirements. Interface with the Rhode Island Minority Business Enterprise Compliance Office to develop a contracting plan that will meet URI's overall goals for MBE/WBE/DBE capital project participation.
18. Upon request, and in coordination with the University News Bureau, assist URI in keeping the general public informed as to progress of the projects including the preparation and update of public project web sites.
19. Recommend a project delivery method for each project, with detailed explanation, for consideration by the University.
20. Upon request, provide a detailed analysis of the benefits and issues of a Project Labor Agreement (PLA) for each of the projects, in full accordance with the requirements established by the Rhode Island Supreme Court, including a market survey. Highlight the suggested terms of negotiation for a PLA. Provide recommendation on the appropriate resolution of the question and terms of a PLA.
21. Upon request, recommend a comprehensive insurance strategy for the projects. Assist in the procurement and administration of the insurance plan.
22. Review the URI standard project safety requirements, and develop a Project Safety Plan for each project, tailored to the demands of the project, for inclusion in the bidding documents. Provide an inspection and written report, with recommendations, for compliance with OSHA standards and the Project Safety Plan by an experienced project safety professional for each project under construction on at least a weekly basis.
23. Review the URI standard Division 1 contract document specifications and, in conjunction with each architect, recommend modifications appropriate to the scope of each project.
24. Staff the project with an experienced program director from start to finish. Provide the services of other professional staff at the appropriate times.
25. Provide staff personnel with expertise in environmental, health and safety issues related to construction. Advise the University on issues arising in these areas related to construction, including the following services:
  - a. Preliminary recognition and identification of potential hazards impacting the project(s)
  - b. Identification of cost effective compliance solutions
  - c. Development of Scopes of Work for environmental services
  - d. Procurement and management of abatement/remediation contracting and consulting services
  - e. Environmental permitting identification, preparation and tracking
  - f. Development of Site Specific Health and Safety Plans
  - g. Interaction and coordination with regulatory agencies
26. Manage and coordinate filings to secure all necessary approvals from the Rhode Island State Building Code Commission, the Rhode Island Department of Environmental Management, the Rhode Island State Fire Marshall, and other appropriate authorities.
27. Provide a USGBC LEED Accredited Professional to support the project in its pursuit of overall sustainable design goal. Direct design and construction to achieve LEED

certification as instructed by the Owner. Provide the following services to assist URI in reaching decisions on sustainability issues and appropriate LEED's goals for each project to ensure compliance with LEED certification standards:

- a. LEED Design Charrettes
  - b. LEED Value Management Sessions
  - c. Life Cycle Cost Analysis
  - d. Identification/evaluation of Green products and materials
  - e. Facilitation/Coordination of project LEED certification program through planning, design and construction
  - f. As directed by URI, integrate LEED requirements into project documents
28. Submit project reports identifying critical issues including design issues, schedule progress and budget vs. actual reporting at monthly intervals.
29. Upon request, maintain and update a secure website for communication of project information between parties associated with the project(s). Information maintained on this website shall include, as a minimum:
- a. Project directory for all project participants
  - b. Bid packages anticipated, pending and awarded
  - c. Budget Status, including potential changes
  - d. Project Schedules
  - e. Current drawings list
  - f. Meeting minutes
  - g. Requests for Information
  - h. Submittal status tracking
  - i. Rolling completion list
30. Direct the preparation of site safety and logistics plans.
31. Coordinate with URI and RI State Division of Purchases to develop bidding procedures, packages and contract document requirements for bidding of the construction work for selected project delivery systems including multiple trade contractors.
32. Recommend project and construction phasing plans. Oversee the preparation of a site utilization plan for access to site, mobilization area, and pedestrian and vehicular traffic around site during construction.
33. Coordinate the development of construction contract forms and general condition documents.
34. Upon request, assist in the development of purchase and award schedules for the procurement of the multiple bid packages during the Bidding Phase.
35. At the completion of Construction Documents, or at any other phase of design requested by URI, provide an Independent Document Coordination review of the design documents. The review shall provide detailed and specific identification of missing or conflicting information among and between the design disciplines. Provide a detailed written report and a set of contract documents marked to clearly identify to the architect,

engineers and consultants the identified deficiencies in a format that can be readily understood and directly acted upon by a draftsman, word processing operator, architect or engineer, as appropriate. Complete the review in a timely fashion to permit incorporation of responses into the Bid Documents.

36. Review drawings, technical specifications and contract language: Coordinate the assembly and develop Scope of Work requirements and Bid Notices for multiple bid packages. Review documents for discipline coordination and completeness. Coordinate the preparation of bid documents and contract language, according to URI requirements and in conjunction with the Architects.
37. Upon request, coordinate the preparation of separate bid packages for long-lead items for separate purchase. Coordinate the preparation of separate bid packages for furniture, fixtures and equipment for purchase.
38. Prepare for the Bidding Phase:
  - a. Develop trade contractor interest in project.
  - b. Review and recommend qualified bidders to be added to the notice list.
  - c. Establish bidding schedules.
  - d. Prepare public bid notice.
  - e. Develop bid comparison sheets.

### 3.6 BIDDING PHASE

The projects may be bid utilizing several delivery systems including lump sum bid and in multiple bid package format for construction through the State of Rhode Island Division of Purchases. All contracts will be held directly by URI with the Program Manager overseeing the management of the contracts as URI's agent.

#### The Program Manager shall:

1. Request issuances of bid documents by and submit bid notices to RI Division of Purchases. Provide bid packages and bid comparison sheets.
2. Coordinate the placement of advertisements with the RI Division of Purchases.
3. Monitor and encourage contractor interest in the project.
4. Organize and attend pre-bid meetings.
  - a. Conduct pre-bid conference to review requirements.
  - b. Field questions from prospective bidders and coordinate responses with the architect.
  - c. Review claims resolution procedures with prospective bidders.
  - d. Conduct additional bidder visits to the sites to facilitate their investigation of existing conditions.
  - e. Prepare meeting minutes of the pre-bid conferences.

5. Coordinate and direct work of each architectural firm in connection with preparation and issuance of addenda
6. Activities upon bid opening:
  - a. Attend bid opening; receive bids from RI Division of Purchases
  - b. Evaluate bids and prepare bid comparisons and award recommendations.
  - c. Advise URI on qualifications of general and trade contractors and material suppliers.
  - d. Assist RI Division of Purchases and appropriate State departments with review of bid responses for bond and insurance certificate conformance, EEO and MBE/WBE business participation
  - e. Support the URI Technical Committees in reviewing bids and recommending award of contracts to the State Division of Purchases.
  - f. Expedite award of contracts on "critical path"
  - g. Monitor status of Purchase Order preparation.
  - h. Upon issuance of Purchase Order, initiate contractor mobilization.

### 3.7 PROJECT CONSTRUCTION

Multiple contractors will perform the construction work. The Program Manager will represent URI in its relationship with general and trade contractors. The duties of the Program Manager are to coordinate, expedite and monitor the activities of all contractors, and to represent URI's interest in the construction process including the following activities:

1. Provide the following services at construction start-up:
  - a. Assist URI in organizing ground breaking ceremonies and public relations services.
  - b. Coordinate activities to obtain building permits, demolition permits, and special permits.
  - c. Record issuance of notice to proceed.
  - d. Coordinate selection and secure contract with testing labs.
  - e. Institute procedures for documenting and processing of shop drawings, Requests for Information, change order requests, change orders, contractor applications for payment, and other appropriate documents for URI's approval. Establish clear lines of communication for all construction administration issues.
  - f. Arrange and attend pre-construction conferences with all contractors and appropriate URI staff.
  - g. Coordinate all contractors' set-up of on-site facilities.
  - h. Coordinate the construction schedule with the project schedule; review and approve all contractors' schedules.
  - i. Review and approve all contractors' schedule of values and ensure the proposed man-hours are listed for each item of work.

- j. Coordinate all contractors' safety activities with project safety programs and conformance with URI Safety Manual, submission of material safety data sheets, university spill prevention plan and hazardous waste procedures.
  - k. Conduct regularly scheduled meetings with owner/architect(s) and with all contractors.
  - l. Review all contractor's phasing plan and sequence of work. Review plans for site and building utilization during construction.
  - m. Maintain all project records. Maintain a photographic record of progress and claim issues
2. Implement a Personnel Authorization system for all construction personnel coming on site. Specifically implement, verify and document the following:
- a. When requested, implement a drug-testing program for new or suspect personnel, to the full extent permitted by Rhode Island law.
  - b. Verify that all tradespersons on site working in trades requiring licenses or operating permits under Rhode Island law are in possession of the documentation certifying their compliance.
  - c. Verify that all personnel entering the site have the OSHA Ten-Hour Training documentation required under Rhode Island law.
  - d. Provide and document an orientation for all personnel coming to work on the site informing them of the project safety and jobsite rules they will be expected to follow.
3. Assist in the management of budget and schedule for all projects:
- a. Review; submit for approval to URI, and then track master schedule for all projects.
  - b. Review; submit for approval to URI, and then track project budget vs. actual for all projects.
  - c. Update project schedule to reflect events and conditions at the jobsite.
  - d. Track expenditures relative to the project budget.
4. Monitor contract compliance for all projects.
5. Assist and direct work of each architectural firm, and provide overview and tracking of the following items:
- a. Approvals of shop drawings.
  - b. Issuance of change orders.
  - c. Site observations.
  - d. Requests for Information
  - e. Structural inspections.
  - f. Building commissioning plan.
  - g. Subcontractor payments.

6. Provide construction administration services as follows:
  - a. Assign full time, experienced, onsite construction superintendents to ensure quality and conformance with URI's contract documents by the field activities of all contractors
  - b. Schedule and attend regular job meetings.
  - c. Coordinate third party vendor testing.
  - d. Provide progress photos documenting all critical construction activities on at least a weekly basis.
  - e. Coordinate work of all contractors to complete project within required time and cost.
  - f. Develop a plan to construct full-scale mock-ups, as appropriate, to set standards of quality and performance.
  - g. Monitor and evaluate the progress of the work relative to schedule.
  - h. Inspect work of all contractors for quality control and contract performance; reject work that does not conform to quality and contract requirements.
  - i. Advise URI on courses of action when contract requirements are not fulfilled.
  - j. Assist URI to resolve any questions that arise during construction.
  - k. Implement claims resolution procedures
7. Review all contractors' application for payments as approved by the architect and recommend for approval to URI; monitor payments over time. Review and verify Certified Payrolls and Lien Waivers for sub-contractors and suppliers required by URI for all monthly and final payments.
8. Maintain shop drawing file; review, log and file shop drawings
9. Implement Change Order processing procedures and manage the Change Order process. Review change orders, and prepare for approval by URI.
10. Submit regular project reports for critical issues including design issues, schedule progress, cash flow forecast, and budget vs. actual reporting.

### 3.8 CLOSEOUT

#### The Program Manager shall:

1. Project completion activities:
  - a. Review and confirm Architect's certification that the project is complete, and that all punchlist items have been addressed.
  - b. Conduct final inspection.
  - c. Obtain final release waivers, consent of surety, and sales tax payment certificate for out of state contractors.
  - d. Close out contracts with all contractors.

- e. Coordinate final inspections with personnel of the State Building Code Commission and the State Fire Marshall offices and URI's Office of Safety and Risk Management.
  - f. Assist Architect in obtaining a Certificate of Occupancy.
  - g. Coordinate building and systems commissioning by commissioning agent and pertinent contractors.
  - h. Observe and assist all contractors in conducting systems start-up testing.
  - i. Develop and conduct appropriate start-up and training programs for URI administrative and maintenance/custodial staff for building systems and equipment.
  - j. Develop recommended spare parts inventory.
  - k. Coordinate final cleaning and start-up service.
  - l. Conduct project performance evaluation meeting and provide evaluation of architect, all contractors and material suppliers
  - m. Assist with claims resolution.
  - n. Coordinate installation of owner provided furnishings and equipment.
  - o. Certify that all furniture and equipment has been delivered and installed.
  - p. Upon request, organize grand opening events and activities.
2. Receive and catalog documents for project closeout:
- a. Delivery of as-built drawings from all contractors and architects in printed and electronic format.
  - b. Coordinate delivery of equipment manuals and warranties.
  - c. Coordinate delivery of O&M manuals,
  - d. Collect and transmit to the Office of Safety and Risk Management, Material Safety Data Sheets (MSDS) for all materials incorporated into the facilities.
3. Financial:
- a. Recommend release of final payment to all contractors, including release of retainage.
  - b. Prepare records for URI audit, upon request.
  - c. Assist URI Controller's Office in obtaining capital account categorization of project expenses for tax and depreciation purposes.
  - d. Assist URI Property & Support Services in completing an inventory of the facilities, in compiling an inventory of the furnishings, fixtures and equipment provided with the facilities, and in developing an identification system for rooms within the facilities.
4. Commissioning:
- a. Begin planning for commissioning with Schematic Design. Develop a preliminary Commissioning plan; review with URI and with the Architect(s). Throughout development of the design, bid packages and submittals, see that

activities, labor and equipment necessary for final commissioning are appropriately specified and contracted.

- b. Implement a Commissioning Process for the project, complying with all LEED Certification requirements and providing services as anticipated by ASHRAE Guideline 0-200X, August 2002 edition. In this respect, act as the Commissioning Authority, URI's Representative and the Program Manager. Solicit appropriate input from users and maintenance personnel on the Owner's staff to guide the commissioning activities.
  - c. Integrate the schedule for start-up, commissioning and qualification activities into the construction schedule. Start prior to mechanical completion of the systems. Plan commissioning to minimize functional system testing overlap, reduce project documentation requirements, and provide earliest possible beneficial operation of the facility.
  - d. If systems in any of the projects require validation, then on URI request provide full validation services to meet U. S. Food and Drug Administration requirements and the requirements of URI, as an additional service.
5. Provide data collection, programming and training services to include operational initiation for all facilities and equipment implemented under this contract on the existing URI Facility Center Facility Management system. Make arrangements to secure electronic Contract Documents and As-Built Documents from architects, engineers and contractors, and install this information in the Facility Center system. Specific features to be included under this requirement include at a minimum:
- a. Asset management. Implement Tracking Make, Model, Serial #, location, In Service date, Preventative Maintenance Schedule with procedures and frequency of work order generation, work order history and other fields of information.
  - b. Preventive Maintenance Input data associated with specific Preventative Maintenance procedures taken from Operations and Maintenance Manuals and other sources and schedule this.

### 3.9 POST CONSTRUCTION SERVICES

#### The Program Manager shall:

1. Assist URI with the following:
  - a. Settlement of all post-construction claims.
  - b. Delivery of all warranties and guarantees.
  - c. Development of appropriate service contracts and Requests for Proposal
  - d. Periodic post-construction commissioning and warranty punch list inspections
  - e. Post-construction evaluation and reports.
  - f. Conduct "lessons learned" project closeout meeting within three months of Substantial Completion for each project.

- g. Conduct a warranty walk-through of completed facilities in conjunction with URI ten months following Substantial Completion of the facilities. Assist in the Settlement of these warranty claims.
- h. Prepare a final accounting of all program costs.

### 3.10 ADDITIONAL SERVICES

If requested by URI, the Program Manager shall provide the following as additional services:

1. Any of the Basic Services for projects beyond the scope of those specified herein as part of the North District Campus.
2. Assist URI with litigation preparation.
3. Relocation Management. At the request of URI, provide services to assist user departments to occupy newly constructed or surge facilities.
  - a. Meet with department heads or management staff to determine needs and User requirements. Review the Users' plans for Furnishings, Fixtures and Equipment (FF&E) in the new space. Provide a Task/Role Matrix identifying the tasks to be performed as a part of the relocation and the individuals who will have responsibility for them.
  - b. In conjunction with URI Property & Support Services, prepare an inventory of the Users' current FF&E stock. In conjunction with Users, determine items to be relocated and reused in new space, placed in storage, or disposed of. Confirm an active and appropriate acquisition plan for the remaining FF&E items to be acquired. Schedule and coordinate deliveries.
  - c. Facilitate an interactive scheduling meeting with users and all groups associated with the relocation to develop detailed occupancy schedules. Provide construction staff representation in this meeting.
  - d. Identify and itemize "special move" requirements, such as laboratory chemicals or other hazards, fragile items, heavy equipment that must be rigged, copiers and libraries.
  - e. Determine requirements for packing and assign responsibilities in this regard.
  - f. Label existing FF&E items for relocation.
  - g. Develop mover's pathways. Develop procedures for work within buildings.
  - h. Review User's needs for computer and telephone services. Arrange for activation of new lines and transfer of current telephone lines to appropriate work locations.
  - i. Oversee Scope preparation and Bid Process for mover services. Comply to the extent feasible with Rhode Island statutes giving preference to Correctional Industries.
  - j. Prepare and administer detailed schedule for move.
  - k. Conduct informational sessions for staff, detailing schedule, procedures, and "how to pack". Respond to staff questions.

1. Provide day-of-move supervision to staff and moving company(ies). Obtain keys, monitor schedule, confirm correct placement and operation of moved items, monitor damage.

#### SECTION 4 - PROPOSAL SUBMISSION

A mandatory Pre-proposal Conference, for the purpose of clarifying the scope and intent of this requirement, as well as the evaluative criteria to be employed in the review of responses to this Request, will be conducted on the date and time indicated on page one of this solicitation.

The deadline for submission is listed on page one of this solicitation. Proposals which are not present in the Rhode Island Division of Purchases reception area at the time of opening for any cause will be determined to be late and not considered. For the purpose of this requirement, the time and date shall be determined by the time clock in the Division of Purchases reception area. No other time source shall be considered.

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 once an award has been made.

In accordance with the Title 7, Chapter 1.1, of the General Laws of Rhode Island, no foreign corporation shall have the right to transact business in this state until it shall have procured a Certificate of Authority to do so from the Secretary of State. The apparent low offeror, if an out of state corporation with no business address within the state must either: 1) provide a copy of their Certificate of Authority , or; 2) show proof that an application is in process prior to the award

Proposals must include the following:

1. A letter of transmittal signed by an owner, officer, or authorized agent of the firm or organization, acknowledging and accepting the terms and conditions of this Request, and tendering an offer to the State. The letter must contain a commitment to provide both the services described herein and the personnel proposed for the assignment.
2. A completed and signed three-page RIVIP Bidder Certification Cover Form, downloadable at [www.purchasing.state.ri.us](http://www.purchasing.state.ri.us)
3. A separate Technical Proposal describing the background, qualification, and experience with and for similar programs, as well as the workplan or approach proposed for this requirement.
4. A Cost Proposal reflecting the fee structure proposed for this scope of services, including completion of the enclosed Cost Proposal Summary form **sealed in a separate envelop**
5. Bid surety, in the amount of \$200,000

The Technical Proposal must contain the following sections:

Executive Summary:

The Executive Summary is intended to highlight the contents of the Technical Proposal and to provide State evaluators with a broad understanding of the offeror's technical approach and ability.

Offeror's Organization and Staffing:

Provide the organization plan. Include identification of all staff and/or subconsultants proposed as members of the project team, and the duties, responsibilities, and concentration of effort that apply to each as well as resumes, curricula vitae, or statements of prior experience and qualification and references.

Management Controls:

Describe how the offeror will deliver the following basic services to be provided in this assignment. Describe in detail the staff qualifications, credentials, experience in handling moves of similar complexity and computerized systems to perform each of these services:

- a. Cost Estimating
- b. Value Engineering
- c. CPM Scheduling
- d. Budget and Actual Cost Reporting
- e. Independent Document Coordination
- f. Project website
- g. Procurement of Services
- h. Quality in Construction
- i. Methods to Encourage MBE/WBE Participation
- j. Commissioning
- k. Relocation Management
- l. Information Sharing and Communication
- m. United States Food and Drug Administration Validation

Previous Experience and Background:

Provide a list of Program Management experience. Include the name of the project; its location; general description of the services; name, address and phone number of the owner and its representative; program budget; and the start and completion of the services provided.

From the list above, provide at least three (3) case studies of Program Management assignments for other clients. Expound on the services provided to each client. Provide a list of new or renovated University, Environmental and Pharmaceutical laboratories which firm has constructed. Include the name of the project; its location; general description of the services; name, address and phone number of the owner and its representative; program budget; and the start and completion of the services provided. From the list above, provide at least five (5) case studies of University, Environmental and Pharmaceutical laboratories. Expound on the services provided to

each client and the specific challenges of each project. Furnish detailed information on experience with each item listed in management controls.

Ownership and Financial:

Describe current ownership of the firm and duration of that ownership. Provide the audited financial statement for the past three years. The offeror's status as a Minority Business Enterprise (MBE), certified by the Rhode Island Department of Economic Development, and or a subcontracting plan which addresses the State's goal of ten per cent (10%) participation by MBE's in all State procurements.

Workplan/Approach Proposed:

This section shall describe the offeror's understanding of URI's requirement, including the result(s) intended and desired, the approach and/or methodology to be employed, and a workplan for accomplishing the results proposed. The description of approach shall discuss and justify the approach proposed for each task, and the technical issues that will or may be confronted at each stage on the project. The workplan description shall include a detailed proposed project schedule by task and subtask, a list of tasks, activities, and/or milestones that will be employed to administer the project, the assignment of staff members and concentration of effort for each, and the attributable deliverables for each.

5. A Cost Proposal reflecting the fee structure proposed for this scope of services, including completion of the enclosed Cost Proposal Summary form sealed in a separate envelop.
6. Respondents shall submit one (1) original and eight (8) copies of the RFP, a Technical Proposal and a Cost Proposal in a separate, sealed envelope labeled with the firm name and marked: "RFP No.B04833 – Program Management Services- Campus Development" and mail or hand deliver to the following address:

**By Courier:**

RI Dept. of Administration  
Division of Purchases, 2<sup>nd</sup> floor  
One Capitol Hill  
Providence, RI 02908-5855

**By Mail:**

R.I. Department of Administration  
Division of Purchases  
P.O. Box 6528  
Providence, RI 02940-6528

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other State locations or which are otherwise not presented in the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed or emailed to the Division of Purchases will not be considered. The official time clock is located in the reception area of the Division of Purchases

**SECTION 5 - EVALUATION AND SELECTION**

The University of Rhode Island will commission a Technical Review Sub-Committee, which will evaluate and score all proposals. The evaluation will be carried out in two stages: Technical and Cost. The Cost Proposals shall remain sealed until the technical scoring has been completed. Only those Offerors whose Technical Proposals have been judged as

acceptable, will have their Cost Proposal opened. All others will be returned. The Technical Review Sub-Committee will use the following criteria:

<u>Criteria</u>	<u>Points</u>
Staff Qualifications and experience	
Program Management	10
University Facilities, in General	5
Research Facilities	10
Firm's Capability, Capacity and Qualifications	
Program Management	10
University Facilities, in General	10
Research Facilities	10
Quality of the Workplan; Suitability of Approach/Methodology	
Project Understanding	5
Project Staffing	10
Technology and Support Systems	5
Schedule Approach	5
Cost	<u>20</u>
Total	100

A minimum score of 65 Points in the Technical Proposal is required to advance to the Cost Proposal stage.

### Cost Proposal

To maintain consistency of project organization throughout the project, it is the University's intent to engage a single Program Management firm or team to provide services for the in the North District Campus Development. The work will be accomplished in accordance with the enclosed schedule and will be released for design and construction as the financing plans are completed. Due to the scope of work, size and nature of the projects at hand, the University of Rhode Island expects the following "core staff" to execute the services detailed in the RFP. This staff will be situated on-site at URI over the entire period of the effort. It is expected that the Program Director will be required an additional period in advance to perform Program Development and Pre-Design Phase services.

#### Core Staff:

- Program Director, Part-time, assigned for duration of project
- Project Manager
- Project Accountant
- Project Superintendent
- Mechanical Coordinator
- Project Engineer(s)
- Office Engineer

In addition to these individuals, the University expects various personnel, namely trades estimators, schedulers, value engineering facilitators, environmental consultants, safety engineers, LEED Accredited Professionals, webmasters, purchasing agents, quality coordinators, independent document reviewers, relocation specialists and commissioning engineers to augment the core staff. It is left to the offeror to determine the level of effort required and the rate of compensation for each of these services in preparation of the bid. Note that under Rhode Island Law, all personnel working at a construction site, whether permanently assigned to the site or visiting, must have in their possession an OSHA 10-hour Training Certification Card.

With regard to General Conditions the Program Manager will provide its own field offices, office furniture, telephone equipment and service, internet service, vehicles, computers, photocopying, shop drawing reproduction, stationary, supplies, fax machines, postage, and liability insurance. The Program Manager will bear all costs of travel between its other offices, including other project sites, and the University, as well as all home office and in-state travel costs. Other travel costs must be pre-approved by the University. The University will furnish electrical, water, and steam services at no cost providing equipment and connections to existing University service mains are installed by the Program Manager. The University will pay the costs of third-party reproduction of Contract Documents.

Complete the Cost Proposal bid matrix below is based on the development of two projects through to completion: the Center for Biotechnology and Life Sciences and support for the utilities planning for the North District and pre-planning for the proposed Pharmacy and Allied Health Sciences Buildings. The duration in weeks has been fixed for core positions and the General Conditions as well as six (6) categories of required studies. The weekly rate used to calculate total cost shall be furnished by the offeror and should include salary, escalation, overtime, overhead (including home office accounting, cost reporting and data processing/IT costs), fringe benefits and profit for the duration of this phase of a project. The offeror shall complete the staffing plan including both proposed durations and weekly rates for all other positions required to complete the projects successfully.

Notwithstanding the forgoing, the University/State reserves the right to award on the basis of cost alone. Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further. The University/State, may at its sole option, elect to require presentation(s) by offerors clearly in consideration for award. The Technical Review Sub-Committee will present the written findings, including the results of all evaluations, to The State's Architect/Engineer and Consultant Services Selection Committee, which will recommend three finalists to the director of the Department of Administration who will make the final selection for this assignment.

**NORTH CAMPUS DEVELOPMENT PROJECT  
COST PROPOSAL MATRIX**

	full rate/wk	req'd weeks	total
POSITION	WEEKLY RATE	WEEKS	TOTAL COST
Program Director (1/2 time)		79	
Assistant Program Director			
Project Manager		104	
Project Accountant		96	
Project Superintendent		78	
Mechanical Coordinator		78	
Project Engineers		96	
Office Engineers		78	
Architectural and Civil Estimators			
Mechanical and Electrical Estimators			
Schedulers			
Value Engineering Facilitators			
Environmental Consultants			
Safety Engineers			
LEED Accredited Professionals			
Webmasters			
Purchasing Agents			
Quality Coordinators			
Commissioning Engineers			

General Conditions, Planning		44	
General Conditions, Construction		104	

STUDIES	COST	Quantity	TOTAL
Value Engineering Reports		3	
Interdisciplinary Document Reviews		1	
Detailed Estimates		6	
Project Labor Agreement Studies		1	
Project Safety Plans		1	
Project Websites		1	

<b>TOTAL COST</b>			
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**SCHEDULE:**

Planning Utilities & North District Plan-----1 March 2005 to 31 Dec. 2006  
 Planning & Preconstruction  
     Center for Biotechnology and Life Sciences-----1 March 2005 to 31 Dec. 2005  
 Bidding Phase -----1 Dec. 2005 to 1 April 2006  
 Construction-----1 April 2006 to 1 Sept. 2007  
 Close Out-----1 Sept. 2007 to 31 Dec. 2007

**ATTACHMENT "A"**  
**STATE OF RHODE ISLAND GENERAL CONDITIONS OF**  
**PURCHASE**

**Document is downloadable from the Rhode Island Department of Administration / Division of Purchases web site at [www.purchasing.ri.us](http://www.purchasing.ri.us). For computer or web site questions relating to this solicitation, call the Help Desk at 401 222-2142, ext 134.**