



**Solicitation Information
November 2, 2018**

RFP# 7597620

TITLE: MPA 430 - Owner's Program Manager Supplement CR 80 – School Construction Projects

Submission Deadline: Wednesday, December 12, 2018 10:00 AM (Eastern Time)

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

**DATE: Friday, November 16, 11:30 AM
LOCATION: School Building Authority
255 Westminster Street - Room 501
Providence, RI 02903**

Questions concerning this solicitation must be received by the Division of Purchases at katherine.missell@purchasing.ri.gov no later than **November 28, 2018 by 5:00 PM**). 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 Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

BID SURETY BOND REQUIRED: NO

PAYMENT AND PERFORMANCE BOND REQUIRED: NO

NAME OF BUYER, TITLE OF BUYER

Note to Applicants:

1. Applicants must register on-line at the State Purchasing Website at www.purchasing.ri.gov
2. Proposals received without a completed RIVIP Bidder Certification Cover Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION COVER FORM

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SECTION 1. INTRODUCTION

The Rhode Island Department of Administration/Division of Purchases, on behalf of the Rhode Island Department of Education (“RIDE”), is soliciting proposals from qualified firms to provide Owner’s Project Manager (OPM) services for School Construction Projects at Rhode Island’s Public Schools, in accordance with the terms of this Request for Proposals (“RFP”) and the State’s General Conditions of Purchase, which may be obtained at the Division of Purchases’ website at www.purchasing.ri.gov.

This solicitation will be used to establish a master price agreement of qualified service providers. The term of this Continuous Recruitment will be for three (3) years (projected May 1, 2019 – June 30, 2022) with four (4) one year extensions at the sole option of RIDE. Additional responses will be reviewed every six months for the duration of this Continuous Recruitment period.

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

Instructions and Notifications to Offerors

1. Potential vendors 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.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this RFP are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this RFP may be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP or for providing oral or written clarification of its content, shall be borne by the vendor. The State assumes no responsibility for these costs even if the RFP is cancelled or continued.
4. Proposals are considered to be irrevocable for a period of not less than 180 days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated in the proposal.
6. It is intended that an award pursuant to this RFP will be made to a prime vendor, or prime vendors in the various categories, who will

assume responsibility for all aspects of the work. Subcontracts are permitted, provided that their use is clearly indicated in the vendor's proposal and the subcontractor(s) to be used is identified in the proposal.

7. The purchase of goods and/or services under an award made pursuant to this RFP will be contingent on the availability of appropriated funds.
8. Vendors are advised that all materials submitted to the Division of Purchases for consideration in response to this RFP may be considered to be public records as defined in R. I. Gen. Laws § 38-2-1, *et seq.* and may be released for inspection upon request once an award has been made.

Any information submitted in response to this RFP that a vendor believes are trade secrets or commercial or financial information which is of a privileged or confidential nature should be clearly marked as such. The vendor should provide a brief explanation as to why each portion of information that is marked should be withheld from public disclosure. Vendors are advised that the Division of Purchases may release records marked confidential by a vendor upon a public records request if the State determines the marked information does not fall within the category of trade secrets or commercial or financial information which is of a privileged or confidential nature.

9. Interested parties are instructed to peruse the Division of Purchases website on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
10. By submission of proposals in response to this RFP vendors agree to comply with R. I. General Laws § 28-5.1-10 which mandates that contractors/subcontractors doing business with the State of Rhode Island exercise the same commitment to equal opportunity as prevails under Federal contracts controlled by Federal Executive Orders 11246, 11625 and 11375.

Vendors are required to ensure that they, and any subcontractors awarded a subcontract under this RFP, undertake or continue programs to ensure that minority group members, women, and persons with disabilities are afforded equal employment opportunities without discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability.

Vendors and subcontractors who do more than \$10,000 in government business in one year are prohibited from engaging in employment discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, national origin, or disability, and are required to submit an "Affirmative Action Policy Statement."

Vendors with 50 or more employees and \$50,000 or more in government contracts must prepare a written "Affirmative Action Plan" prior to issuance of a purchase order.

- a. For these purposes, equal opportunity shall apply in the areas of recruitment, employment, job assignment, promotion, upgrading, demotion, transfer, layoff, termination, and rates of pay or other forms of compensation.
- b. Vendors further agree, where applicable, to complete the “Contract Compliance Report” (<http://odeo.ri.gov/documents/odeo-eeo-contract-compliance-report.pdf>), as well as the “Certificate of Compliance” (<http://odeo.ri.gov/documents/odeo-eeo-certificate-of-compliance.pdf>), and submit both documents, along with their Affirmative Action Plan or an Affirmative Action Policy Statement, prior to issuance of a purchase order. For public works projects vendors and all subcontractors must submit a “Monthly Utilization Report” (<http://odeo.ri.gov/documents/monthly-employment-utilization-report-form.xlsx>) to the ODEO/State Equal Opportunity Office, which identifies the workforce actually utilized on the project.

For further information, contact Vilma Peguero at the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via e-mail at ODEO.EOO@doa.ri.gov.

11. In accordance with R. I. Gen. Laws § 7-1.2-1401 no foreign corporation has the right to transact business in Rhode Island until it has procured a certificate of authority so to do from the Secretary of State. This is a requirement only of the successful vendor(s). For further information, contact the Secretary of State at (401-222-3040).
12. In accordance with R. I. Gen. Laws §§ 37-14.1-1 and 37-2.2-1 it is the policy of the State to support the fullest possible participation of firms owned and controlled by minorities (MBEs) and women (WBEs) and to support the fullest possible participation of small disadvantaged businesses owned and controlled by persons with disabilities (Disability Business Enterprises a/k/a “DisBE”)(collectively, MBEs, WBEs, and DisBEs are referred to herein as ISBEs) in the performance of State procurements and projects. As part of the evaluation process, vendors will be scored and receive points based upon their proposed ISBE utilization rate in accordance with 150-RICR-90-10-1, “Regulations Governing Participation by Small Business Enterprises in State Purchases of Goods and Services and Public Works Projects”. As a condition of contract award vendors shall agree to meet or exceed their proposed ISBE utilization rate and that the rate shall apply to the total contract price, inclusive of all modifications and amendments. Vendors shall submit their ISBE participation rate on the enclosed form entitled “MBE, WBE and/or DisBE Plan Form”, which shall be submitted in a separate, sealed envelope as part of the proposal. ISBE participation credit will only be granted for ISBEs that are duly certified as MBEs or WBEs by the State of Rhode Island, Department of Administration, Office of Diversity, Equity and Opportunity or firms certified as DisBEs by the Governor’s Commission on Disabilities. The current directory of firms certified as MBEs or WBEs may be accessed at <http://odeo.ri.gov/offices/mbeco/mbe-wbe.php>. Information regarding DisBEs may be accessed at www.gcd.ri.gov.

For further information, visit the Office of Diversity, Equity & Opportunity’s website, at <http://odeo.ri.gov/> and *see* R.I. Gen. Laws Ch. 37-14.1, R.I. Gen. Laws Ch. 37-2.2, and 150-RICR-90-10-1. The Office of Diversity, Equity & Opportunity may be contacted at, (401) 574-8670 or via email Dorinda.Keene@doa.ri.gov

SECTION 2. BACKGROUND

The State of Rhode Island is committed to providing high quality educational opportunities for all public school students. School facilities provide more than a place for instruction. The physical learning environment contributes to the successful performance of educational programs.

On July 1, 2015, the Rhode Island General Assembly lifted the moratorium on school construction, established the School Building Authority (Authority) and the SBA Advisory Board, and created a new mechanism for funding school construction, the SBA Capital Fund. In doing so, Rhode Island has reaffirmed the commitment to ensure that our State's children have safe, healthy, adequate and educationally appropriate school facilities. The SBA, located within the Department of Education, will build upon the best aspects of the School Construction Program while introducing new statewide initiatives, fiscal prudence, opportunities, oversight, and funding streams.

The School Building Authority ensures that all approved projects provide high quality learning environments, conserve natural resources, consume less energy, are easier to maintain, and provide educationally appropriate school facilities. This includes overseeing and managing two distinct funding mechanisms for school facilities: the Housing Aid Program and the School Building Authority Capital Fund. The School Building Authority will continue to provide assistance as schools and districts undertake the multi-stage Necessity of School Construction Application to identify school facilities' needs across the schools and districts buildings.

The School Building Authority is governed by the [School Construction Regulations](#) (SCR), which were adopted by the Board of Regents in 2007. The SCR sets standards for design and construction of school facilities, in order to assist schools and districts in providing the quality learning environment necessary for children to perform at higher levels.

In Rhode Island, Local Education Agencies (LEAs) that seek to receive State Aid on School Construction projects, must complete the [Necessity of School Construction Application process](#). The Necessity of School Construction process is a multi-stage application that requires LEAs to conduct thorough facility assessments toward the creation of an efficient and prudent masterplan. Once reviewed, vetted, and prioritized by the School Building Authority, the SBA Advisory Board will recommend projects for approval by the Council on Elementary and Secondary Education. Approved projects are eligible for State aid through one of two mechanisms: [Housing Aid](#) reimbursement or [SBA Capital Fund](#) progress payments.

STAGE I – IDENTIFICATION OF NEED

Stage I begins with LEAs submitting a Letter of Intent, as well as a commitment to follow the School Construction Regulations and all applicable statutes and regulations. During Stage I, LEAs conduct facility conditions assessments, prepare demographic projections, and provide educational programs for each school facility. Through the careful study of these factors LEAs attain a comprehensive understanding of districtwide capacity, enrollment trends, and the alignment of existing facilities to the educational program being offered in each school.

STAGE II – DEVELOPMENT OF A SOLUTION

During Stage II, LEAs work with an architectural and engineering team to propose solutions to the identified issues. This process requires the development of schematic design documentation that can be used to provide dependable cost estimates. These scope descriptions and the accompanying

costs are the basis for establishing a budget and project descriptions that are forwarded to the SBA Advisory Board and the Council on Elementary and Secondary Education.

After receiving approval, design reviews must be conducted for all projects that are part of a multi-year capital improvement plan that exceeds \$500,000, regardless of eligibility for housing aid. Design reviews will be conducted through in-person meetings at each stage of the design process. Design review meetings will be scheduled by district representatives or their designees.

This request for proposal is to establish a Master Price Agreement with the State of Rhode Island to provide Owner’s Program Manager (OPM) services to LEAs for their school construction projects. The OPM will provide professional project management services and assist LEAs in undertaking school construction projects.

SECTION 3: SCOPE OF WORK AND REQUIREMENTS

General Scope of Work

The "Owner's program manager" is defined in statute (RIGL 37-2-7 (32)) as: *“an entity engaged to provide project management services on behalf of a state agency for the construction and supervision of the construction of a building project. The owner's program manager acts as the owner's agent in all aspects of the construction project, including, but not limited to, architectural programming, planning, design, construction, and the selection and procurement of an appropriate construction delivery method. The owner's program manager shall have at least seven (7) years experience in the construction and supervision of construction of buildings of similar size and complexity. The owner's program manager shall not have been employed during the preceding year by the design firm, the construction firm, and/or the subcontractors associated with the project.”*

The Owner’s Program Manager shall provide project management services to monitor procurement procedures, design, construction and other related activities and to facilitate, coordinate and manage the Project with respect to timely performance in accordance with the Project Schedule and monitor the quality of services and workmanship and shall recommend courses of action to the Owner when respective contractual requirements are not being fulfilled. Per the School Construction Regulations, the OPM must assist the LEA in ensuring “that construction will be completed in a timely, cost-effective manner and that buildings will be occupied within the timelines established during the approval process.”

Services shall continue through substantial use and occupancy by the Owner, and Project closeout. As part of Basic Services, the OPM shall ensure projects are in compliance with the School Construction Regulations and the LEA’s Memorandum of Agreement. The OPM must provide information as requested during final auditing as conducted by the School Building Authority at the Rhode Island Department of Education.

In general, the Basic Services of an OPM include, but are not limited to:

PROJECT ADMINISTRATION

The OPM will be responsible for coordination among team members from the municipality, the

LEA, and the public, including the development of a project communications plan. The OPM may also provide data and photos for the project website and to support the communications plan.

The OPM shall assist the Design Team, Municipality, LEA, and the School Building Committee as follows: in preparation of all documentation and reports required for RIDE, including design submissions, cost estimates, and other materials; and preparation and submittal comprehensive monthly project report. In addition, the OPM shall work with the School Building Committee, including preparing agendas, recording minutes, and providing project reports. The OPM shall act on behalf of the Municipality and the LEA, in attending Owner, Architect, and Contractor meeting, including the review of meeting minutes for completeness and accuracy.

The OPM will track and ensure compliance with regulatory and statutory compliance, including MBE/WBE/DBE requirements for contractors and vendors. The OPM will also track compliance with certified payroll requirements for all project contractors, subcontractors, and vendors. The OPM shall maintain complete and comprehensive files of all project documents and assist in making materials available to RIDE if necessary.

FINANCIAL

The OPM will assist in the development of the final Total Project Budget, as well as tracking, updating, and reconciling the budget throughout project term. The OPM will maintain project budget records, by category, in a format that tracks RIDE reimbursable / non-reimbursable expenses and tracks the expenses against the Memorandum of Agreement with RIDE.

In addition, the OPM will develop project cash flow projections, work closely with Municipal Finance Director on the review of all applications for payment and invoices submitted to the municipalities, and offer payment recommendations. The OPM will assist the LEA and the Municipality in requesting State aid for school construction projects including: Preparation submittal RIDE monthly Progress Payment Request Forms for SBA Capital Fund reimbursement and Housing Aid forms with all necessary supporting documentation. This may include working with RIDE and/or RIDE's consultants on reviews or audits as part of the payment process.

CONSTRUCTION MANAGER/GENERAL CONTRACTOR SELECTION

The OPM is to advise the municipality in the selection of construction delivery options. This may include the following tasks:

- Prepare request for qualifications, public notice, solicitation, scope of required services, and evaluation criteria
- Assist and advise the Municipality, the LEA, and the School Building Committee in selection of General Contractor (GC) or Construction Manager (CM) to proceed to Statement of Qualifications
- Assist and advise Municipality, LEA, and School Building Committee in selection of GC/CM's to proceed to Request for Proposals
- Assist in determination of most qualified, apparent low bidder and make recommendations to Owner
- Maintain bidding information and tabulations sheets
- Provide assistance, consultation, guidance in negotiation of GC/CM contract and GMP
- Ensure that selected GC/CM complies with all statutory requirements, including MBE/WBE/DBE requirements
- Assist with negotiating fair and reasonable CM allowances and contingencies

SCHEMATIC DESIGN, DESIGN DEVELOPMENT & CONSTRUCTION DOCUMENTS PHASES

The OPM plays a critical role during the design phase, in providing support and oversight of the design team, including the coordination of meetings, maintaining schedules, and reconciling budgets. Specifically, the OPM shall provide oversight of Designer and Construction Manager activities, including the reconciliation of budget and schedule at each phase. The OPM shall maintain and update the Project Budget and Schedule, including the development of a schedule and production of early bid packages, as necessary.

The OPM shall assist the Municipality and the LEA in coordinating, attending, and taking minutes for design review meeting with the School Building Authority at RIDE. The OPM shall ensure that projects are in compliance with all applicable provisions in the School Construction Regulations (SCR), including that projects have “undergone review in accordance with applicable state law and regulations and, to the extent applicable to the project, by the Rhode Island’s State Building Commissioner, Department of Administration, Department of Health, Historical Preservation and Heritage Commission, Commission for Human Rights, Department of Environmental Management, Governor’s Commission on Disabilities, Architectural Access Board, and any other department or agency of the state required by law to review such projects” per SCR 1.03-1 (8). In addition, the OPM shall ensure “projects shall have undergone review in accordance with applicable local or district charters, by-laws, ordinances, or regulations” per SCR 1.03-1 (9).

The OPM shall provide all necessary supporting material to the SBA in preparation for this meeting, including approvals/correspondence with Authorities Having Jurisdiction, cost estimates, commissioning reports and other materials as required by the School Construction Regulations. The OPM shall work with the Designer to ensure that: “Projects shall meet all applicable federal, state, local, and regional building code requirements. Projects shall reflect cost-effective design, material, and finish decisions consistent with good architectural and engineering practice and high quality construction. Projects shall demonstrate that the current technological needs of students, faculty, and school staff are met.” (Per SCR 1.04 -1)

The OPM shall also be responsible for developing at least three detailed construction estimates Schematic Design, Design Development and Construction Documents. In developing the cost estimates the OPM shall coordinate with the Designer and the GC/CM, and make recommendations to the Municipality, the LEA, and other the School Building Committee as necessary. The OPM shall ensure that projects are consistent with the scope and budget memorialized in the LEA’s MOA and ensure that soft costs do not exceed 20% of general construction costs.

SCHEDULING

The OPM shall be responsible for the preparing, tracking, and reconciling schedules, including the development of overall Project Baseline Schedule and a detailed Milestone Schedule that incorporates GC/CM’s construction schedule as they become available. The OPM shall assess and ensure actual project progress to baseline schedule, report variances to Municipality, LEA, and School Building Committee. In the event of schedule slippage, will consult with Designer and GC/CM to develop recovery schedule activities and advise Municipality, LEA, and School Building Committee as to recommended recovery schedule activities.

CONSTRUCTION

During construction, the OPM provides a critical role of representing the owner's interests from start of major construction to substantial completion. During the course of project completion the OPM assists the Municipality, LEA, and School Building Committee in the management of the project, including tracking, compliance documentation, oversight, scheduling, coordination, and management. These tasks include, but may not be limited to:

Project Tracking and Compliance

- Monitor Designer's and GC/CM's construction administration activities to ensure contract compliance and timely decisions
- Perform quality control inspections of work completed to verify compliance with contract documents
- Prepare and maintain detailed daily, weekly, and monthly reports recording all project data and activity
- Track time and material change order work, when utilized as basis for changes
- Maintain and update on a daily basis, if needed, current contract drawings, specifications and logs
- Take extensive daily photographs of progress, record and maintain project's photo log
- Monitor GC/CM's compliance with contract documents and quality control specifications
- Develop and maintain a Rolling Completion List of non-conforming items to mitigate punch list items
- Monitor compliance with the School Construction Regulations throughout the construction process to ensure that all building systems, mechanical and lighting equipment are in compliance with regulations, included in and consistent with all plans, construction documents, and cost estimates

Personnel

- Ensure all construction personnel and vendors have passed CORI (criminal offender record info) checks
- Ensure enforcement of zero tolerance policies regarding student / staff non-contact, foul language, and smoking
- Consult daily with Principal, or designee(s), regarding construction activities, impacts, issues, and resolve with GC/CM

Coordination and Management

- Prepare work scopes, request for qualifications and assist the Municipality, LEA, and School Building Committee in selection of independent testing agency
- Coordinate scheduling and reporting of independent testing agency, ensure reports are distributed and tracked
- Review and comment on GC/CM's baseline schedule of values and baseline schedule
- Identify potential issues, report to Designer and GC/CM, maintain project issues log, track to resolution
- Schedule commissioning consultant, track submission of reports, follow-up actions by Designer and GC/CM
- Ensure that the Owner's interests are met and that commissioning agent reviews are reconciled in a timely manner
- Review CM's draft monthly requisition for payment, make recommendations to Owner and Designer
- Manage and schedule independent air quality testing for each phase of the Project
- Assist Designer with identification of punch list items

- Assist the Commissioning Agent in verifying that building staff members are well-trained and possess the documentation they need to operate and maintain the building's systems and equipment after turnover

Change Orders

- Review all change order submissions and schedule extension claims, and recommendations to Municipality/LEA and Designer
- Maintain detailed contingency log, tracking potential change order data
- Submit all change orders in excess of 10% of project value to the School Building Authority at the RI Department of Education

FF&E, PHASING, and MOVE MANAGEMENT

In addition to the construction related project management services, the OPM may be required to assist the Municipality, LEA, and School Building Committee with the ensuring the uninterrupted delivery of educational programs during the course of the construction. In order to do so, the OPM shall:

- Assist the Designer in developing Phasing Plans as necessary to accommodate construction activities that occur during dates/times that the school is occupied
- Ensure that Phasing Plan includes building access points, utility connections, separate access for construction crews, staging areas, etc.
- Assist the Principal, or designee, on internal move management as necessary for project
- Coordinate efforts regarding changing building access points, wayfinding and signage, system shutdowns, etc.
- Coordinate changing building access points and getting that message out to students, staff, public, etc.
- Prepare RFP for relocation services by movers and other vendors, and manage activities for each move phase
- Assist the Owner with the coordination of the FFE design package
- Assist Owner with procurement of furniture, equipment and technology equipment not in GC/CM contract
- Coordinate and schedule deliveries of all Owner furnished items
- Coordinate GC/CM's pre-requisite construction activities required for each phase move
- Coordinate and oversee the delivery and installation of FF&E

MOA COMPLIANCE and STATE AID

The OPM shall track and ensure compliance with the LEA's Memorandum of Agreement with the RI Department of Education, including tracking projects progress, project budget, and compliance with all statutory and regulatory requirements, including:

- Assist the LEA in submitting progress payment requests for the SBA Capital Fund or any other pay as you go funding
- Assist the LEA in submitting Housing Aid reimbursement requests to the School Building Authority at RIDE
- Ensure that the LEA does not submit ineligible costs as defined by statute and regulations (SCR 1.07-3)
- Ensure that all projects have conducted design reviews, and can provide meeting minutes or design review documentation to substantiate
- Ensure compliance with the Northeast Collaborative for High Performance Schools including the submittal of pre- and post-construction certification

- Ensure that projects have been fully commissioned by the Commissioning Agent and all open items have been reconciled as documented in the final report
- Assist the LEA, Municipality, and School Building Committee in maintaining project files as required by the School Construction Regulations (1.09-6)
- Provide quarterly reporting updates on all projects using RIDE established portals

Actual project request for proposals, specific scopes of work, and contract requirements will be solicited by the School Building Authority or directly from municipalities/LEAs to vendors on the MPA list.

Special Contingencies: The district must participate and obtain all jurisdictional (federal, state and local) reviews and approvals pursuant to RIDE School Construction Regulations. The services of qualified and capable vendors with offices in Rhode Island, or those who propose a joint venture with a Rhode Island firm, shall be utilized whenever possible.

The selected vendors will be required to attend an annual training provided by the School Building Authority at the RI Department of Education.

SECTION 4: PROPOSAL

A. Technical Proposal

Narrative and format: The proposal should address specifically each of the following elements:

1. **Staff Qualifications** – Provide staff resumes/CV and describe qualifications and experience of key staff who will be involved in projects, including their experience in the field of School Construction and Project Management. Include any past experience in Rhode Island K-12 construction.
2. **Capability, Capacity, and Qualifications of the Offeror** - Please provide a detailed description of the Vendor's experience as an Owner's Project Manager, including specific experience with K-12 School Construction. Include any past experiences in Rhode Island and any familiarity or knowledge of the RIDE School Construction Regulations. A list of relevant client references must be provided, to include client names, addresses, phone numbers, dates of service and type(s) of service(s) provided.
3. **Work Plan** - Please describe in detail, the framework within which requested Owner's Project Management services will be performed. Provide an understanding of the School Construction process in Rhode Island.
4. **Approach/Methodology** – Define the methodology to be used to ensure that all projects come in on time and on budget. What procedures will be used to minimize change orders, maintain project schedules, assure compliance with the Memorandum of Agreement, and ensure projects are completing as planned?

B. Cost Proposal

Individual communities or the Authority will solicit vendors on the MPA for specific projects. In consideration of Owner's Project Manager's delivery of Basic Services, the Owner shall pay the Owner's Project Manager on an hourly basis that shall not exceed three (3%) of project costs.

Certain out of pocket expenses paid by the Owner's Project Manager such as filing fees, and permit fees that are normally paid by the Owner; travel to fabrication or manufacturing locations to identify completed, identified, and stored materials or equipment specifically for the Project; field office furnishings.

Any other specially authorized reimbursement deemed essential by the Owner, in the Owner's sole discretion, in writing.

Non-Reimbursable Items: The Owner shall not reimburse the Owner's Project Manager or its Subconsultants for travel expenses, sustenance, telephone, facsimiles, electronic mails, postage and delivery expenses, unless specifically required elsewhere in this Contract.

The Owner's Project Manager shall not be entitled to compensation under this Article for the services of Subconsultants hired to perform Basic Services.

Provide hourly rates for all Owner's Project Management Services on the attached Budget Forms.

C. ISBE Proposal

See Appendix A for information and the MBE, WBE, and/or Disability Business Enterprise Participation Plan form(s). Bidders are required to complete, sign and submit these forms with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.

SECTION 5: EVALUATION AND SELECTION

Proposals shall be reviewed by a technical evaluation committee ("TEC") comprised of staff from State agencies. The TEC first shall consider technical proposals.

Technical proposals must receive a minimum of 60 (85.7%) out of a maximum of 70 points to advance to the cost evaluation phase. Any technical proposals scoring less than 60 points shall not have the accompanying cost or ISBE participation proposals opened and evaluated. The proposal will be dropped from further consideration.

Technical proposals scoring 60 points or higher will have the cost proposals evaluated and assigned up to a maximum of 30 points in cost category bringing the total potential evaluation score to 100 points. After total possible evaluation points are determined ISBE proposals shall be evaluated and assigned up to 6 bonus points for ISBE participation.

The Division of Purchases reserves the right to select the vendor(s) or firm(s) ("vendor") that it deems to be most qualified to provide the goods and/or services as specified herein; and, conversely, reserves the right to cancel the solicitation in its entirety in its sole discretion.

Proposals shall be reviewed and scored based upon the following criteria:

Criteria	Possible Points
Staff Qualifications	10 Points
Capability, Capacity, and Qualifications of the Offeror	20 Points
Work Plan	20 Points
Approach Proposed	20 Points
Total Possible Technical Points	70 Points
Cost proposal*	30 Points
Total Possible Evaluation Points	100 Points
ISBE Participation**	6 Bonus Points
Total Possible Points	106 Points

***Cost Proposal Evaluation:**

The vendor with the lowest cost proposal shall receive one hundred percent (100%) of the available points for cost. All other vendors shall be awarded cost points based upon the following formula:

$$(\text{lowest cost proposal} / \text{vendor's cost proposal}) \times \text{available points}$$

For example: If the vendor with the lowest cost proposal (Vendor A) bids \$65,000 and Vendor B bids \$100,000 for monthly costs and service fees and the total points available are thirty (30), Vendor B's cost points are calculated as follows:

$$\$65,000 / \$100,000 \times 30 = 19.5$$

****ISBE Participation Evaluation:**

a. Calculation of ISBE Participation Rate

1. ISBE Participation Rate for Non-ISBE Vendors. The ISBE participation rate for non-ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of non-ISBE vendor's total contract price that will be subcontracted to ISBEs by the non-ISBE vendor's total contract price. For example if the non-ISBE's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs, the non-ISBE's ISBE participation rate would be 12%.
2. ISBE Participation Rate for ISBE Vendors. The ISBE participation rate for ISBE vendors shall be expressed as a percentage and shall be calculated by dividing the amount of the ISBE vendor's total contract price that will be subcontracted to ISBEs and the amount that will be self-performed by the ISBE vendor by the ISBE vendor's total contract price. For example if the ISBE vendor's total contract price is \$100,000.00 and

it subcontracts a total of \$12,000.00 to ISBEs and will perform a total of \$8,000.00 of the work itself , the ISBE vendor's ISBE participation rate would be 20%.

b. Points for ISBE Participation Rate:

The vendor with the highest ISBE participation rate shall receive the maximum ISBE participation points. All other vendors shall receive ISBE participation points by applying the following formula:

$$\begin{aligned} & (\text{Vendor's ISBE participation rate} \div \text{Highest ISBE participation rate}) \\ & \quad \times \text{Maximum ISBE participation points)} \end{aligned}$$

For example, assuming the weight given by the RFP to ISBE participation is 6 points, if Vendor A has the highest ISBE participation rate at 20% and Vendor B's ISBE participation rate is 12%, Vendor A will receive the maximum 6 points and Vendor B will receive $(12\% \div 20\%) \times 6$ which equals 3.6 points.

General Evaluation:

Points shall be assigned based on the vendor's clear demonstration of the ability to provide the requested goods and/or services. Vendors may be required to submit additional written information or be asked to make an oral presentation before the TEC to clarify statements made in the proposal.

SECTION 6. QUESTIONS

Questions concerning this solicitation must be e-mailed to the Division of Purchases at katherine.missell@purchasing.ri.gov no later than the date and time indicated on page one of this solicitation. No other contact with State parties is permitted. Please reference **RFP # 7597620** on all correspondence. Questions should be submitted in writing in a Microsoft Word attachment in a narrative format with no tables. Answers to questions received, if any, shall be posted on the Division of Purchases' website as an addendum to this solicitation. It is the responsibility of all interested parties to monitor the Division of Purchases website for any procurement related postings such as addenda. If technical assistance is required, call the Help Desk at (401) 574-8100.

SECTION 7. PROPOSAL CONTENTS

a. Proposals shall include the following:

- a. One completed and signed RIVIP Bidder Certification Cover Form (included in the original copy only) downloaded from the Division of Purchases website at www.purchasing.ri.gov. *Do not include any copies in the Technical or Cost proposals.*
- b. One completed and signed Rhode Island W-9 (included in the original copy only) downloaded from the Division of Purchases website at <http://www.purchasing.ri.gov/rivip/publicdocuments/fw9.pdf>. *Do not include any copies in the Technical or Cost proposals.*
- c. Two (2) completed original and copy versions, signed and sealed Appendix A. MBE, WBE, and/or Disability Business Enterprise

Participation Plan. Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation. *Do not include any copies in the Technical or Cost proposals.*

- d. Technical Proposal - describing the qualifications and background of the applicant and experience with and for similar projects, and all information described earlier in this solicitation. The technical proposal is limited to twenty (20) pages (this excludes any appendices and as appropriate, resumes of key staff that will provide services covered by this request).
 - a. One (1) Electronic copy on a CD-R, marked "Technical Proposal - Original". One (1) printed paper copy, marked "Technical Proposal - Original" and signed.
 1. Two (2) printed paper copies
 - e. Cost Proposal - A separate, signed and sealed cost proposal reflecting the hourly rate, or other fee structure, proposed to complete all of the requirements of this project.
 1. One (1) Electronic copy on a CD-R, marked "Cost Proposal -Original".
 2. One (1) printed paper copy, marked "Cost Proposal -Original" and signed.
 3. One (1) printed paper copies
- b. Formatting of proposal response contents should consist of the following:
 1. Formatting of CD-Rs – Separate CD-Rs are required for the technical proposal and cost proposal. All CD-Rs submitted must be labeled with:
 - Vendor's name
 - RFP #
 - RFP Title
 - Proposal type (e.g., technical proposal or cost proposal)
 - If file sizes require more than one CD-R, multiple CD-Rs are acceptable. Each CD-R must include the above labeling and additional labeling of how many CD-Rs should be accounted for (e.g., 3 CD-Rs are submitted for a technical proposal and each CD-R should have additional label of '1 of 3' on first CD-R, '2 of 3' on second CD-R, '3 of 3' on third CD-R).

Vendors are responsible for testing their CD-Rs before submission as the Division of Purchase's inability to open or read a CD-R may be grounds for rejection of a Vendor's proposal. All files should be readable and readily accessible on the CD-Rs submitted with no instructions to download files from any external resource(s). If a file is partial, corrupt or unreadable, the Division of Purchases may consider it "non-responsive". USB Drives or any other electronic media shall not be accepted. Please note that CD-Rs submitted, shall not be returned.

 2. Formatting of written documents and printed copies:
 1. For clarity, the technical proposal shall be typed. These documents shall be single-spaced with 1" margins on white 8.5"x 11" paper using a font of 12 point Calibri or 12 point Times New Roman.
 2. All pages on the technical proposal are to be sequentially numbered in the footer, starting with number 1 on the first page of the narrative (this does not include the cover page or table of contents) through to

the end, including all forms and attachments. The Vendor's name should appear on every page, including attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to.

3. Printed copies are to be only bound with removable binder clips.

SECTION 8. PROPOSAL SUBMISSION

Interested vendors must submit proposals to provide the goods and/or services covered by this RFP on or before the date and time listed on the cover page of this solicitation. Responses received after this date and time, as registered by the official time clock in the reception area of the Division of Purchases, shall not be accepted.

Proposals should be mailed or hand-delivered in a sealed envelope marked "**RFP# 7597620**" to:

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

NOTE: Proposals received after the above-referenced due date and time shall not be accepted. Proposals misdirected to other State locations or those not presented to the Division of Purchases by the scheduled due date and time shall be determined to be late and shall not be accepted. Proposals faxed, or emailed, to the Division of Purchases shall not be accepted. The official time clock is in the reception area of the Division of Purchases.

SECTION 9. CONCLUDING STATEMENTS

Notwithstanding the above, the Division of Purchases reserves the right to award on the basis of cost alone, to accept or reject any or all proposals, and to award in the State's best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

If a Vendor is selected for an award, no work is to commence until a purchase order is issued by the Division of Purchases.

The State's General Conditions of Purchase contain the specific contract terms, stipulations and affirmations to be utilized for the contract awarded for this RFP. The State's General Conditions of Purchases can be found at the following URL: <https://www.purchasing.ri.gov/RIVIP/publicdocuments/ATTA.pdf>.

APPENDIX A. PROPOSER ISBE RESPONSIBILITIES AND MBE, WBE, AND/OR DISABILITY BUSINESS ENTERPRISE PARTICIPATION FORM

1. Proposer's ISBE Responsibilities (from 150-RICR-90-10-1.7.E)

1. Proposal of ISBE Participation Rate. Unless otherwise indicated in the RFP, a Proposer must submit its proposed ISBE Participation Rate in a sealed envelope or via sealed electronic submission at the time it submits its proposed total contract price. The Proposer shall be responsible for completing and submitting all standard forms adopted pursuant to 105-RICR-90-10-1.9 and submitting all substantiating documentation as reasonably requested by either the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to the names and contact information of all proposed subcontractors and the dollar amounts that correspond with each proposed subcontract.
2. Failure to Submit ISBE Participation Rate. Any Proposer that fails to submit a proposed ISBE Participation Rate or any requested substantiating documentation in a timely manner shall receive zero (0) ISBE participation points.
3. Execution of Proposed ISBE Participation Rate. Proposers shall be evaluated and scored based on the amounts and rates submitted in their proposals. If awarded the contract, Proposers shall be required to achieve their proposed ISBE Participation Rates. During the life of the contract, the Proposer shall be responsible for submitting all substantiating documentation as reasonably requested by the Using Agency's MBE/WBE Coordinator, Division, ODEO, or Governor's Commission on Disabilities including but not limited to copies of purchase orders, subcontracts, and cancelled checks.
4. Change Orders. If during the life of the contract, a change order is issued by the Division, the Proposer shall notify the ODEO of the change as soon as reasonably possible. Proposers are required to achieve their proposed ISBE Participation Rates on any change order amounts.
5. Notice of Change to Proposed ISBE Participation Rate. If during the life of the contract, the Proposer becomes aware that it will be unable to achieve its proposed ISBE Participation Rate, it must notify the Division and ODEO as soon as reasonably possible. The Division, in consultation with ODEO and Governor's Commission on Disabilities, and the Proposer may agree to a modified ISBE Participation Rate provided that the change in circumstances was beyond the control of the Proposer or the direct result of an unanticipated reduction in the overall total project cost.

2. MBE, WBE, AND/OR Disability Business Enterprise Participation Plan Form:

Attached is the MBE, WBE, and/or Disability Business Enterprise Participation Plan form. Bidders are required to complete, sign and submit with their overall proposal in a sealed envelope. Please complete separate forms for each MBE, WBE and/or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.



**STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS
DEPARTMENT OF ADMINISTRATION
ONE CAPITOL HILL
PROVIDENCE, RHODE ISLAND 02908**

MBE, WBE, and/or DISABILITY BUSINESS ENTERPRISE PARTICIPATION PLAN

Bidder's Name:

Bidder's Address:

Point of Contact:

Telephone:

Email:

Solicitation No.:

Project Name:

This form is intended to capture commitments between the prime contractor/vendor and MBE/WBE and/or Disability Business Enterprise subcontractors and suppliers, including a description of the work to be performed and the percentage of the work as submitted to the prime contractor/vendor. Please note that all MBE/WBE subcontractors/suppliers must be certified by the Office of Diversity, Equity and Opportunity MBE Compliance Office and all Disability Business Enterprises must be certified by the Governor's Commission on Disabilities at time of bid, and that MBE/WBE and Disability Business Enterprise subcontractors must self-perform 100% of the work or subcontract to another RI certified MBE in order to receive participation credit. Vendors may count 60% of expenditures for materials and supplies obtained from an MBE certified as a regular dealer/supplier, and 100% of such expenditures obtained from an MBE certified as a manufacturer. This form must be completed in its entirety and submitted at time of bid. **Please complete separate forms for each MBE/WBE or Disability Business Enterprise subcontractor/supplier to be utilized on the solicitation.**

Name of Subcontractor/Supplier:

Type of RI Certification: MBE WBE Disability Business Enterprise

Address:

Point of Contact:

Telephone:

Email:

Detailed Description of Work To Be Performed by Subcontractor or Materials to be Supplied by Supplier:

Total Contract Value (\$):

Subcontract Value (\$):

ISBE Participation Rate (%):

Anticipated Date of Performance:

I certify under penalty of perjury that the forgoing statements are true and correct.

Prime Contractor/Vendor Signature

Title

Date

Subcontractor/Supplier Signature

Title

Date