



**Solicitation Information
November 28, 2018**

RFP# 7597657

TITLE: Educational Facility Master Planner – School Construction Projects, Master Price Agreement / Continuous Recruitment

Submission Deadline: Friday January 11, 2019 at 10:00 AM

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

**DATE: Wednesday December 5, 2018 at 10:00 AM
LOCATION: School Building Authority at the Rhode Island Department of Education
255 Westminster Street Room 501**

Questions concerning this solicitation must be received by the Division of Purchases at Thomas.bovis@purchasing.ri.gov no later than **December 17,2018 at 4 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**

Thomas Bovis, Interdepartmental Project Manager

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 Educational Facility Master Planners 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 Master Price Agreement / 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.

The Educational Facility Planner (EFP) shall provide architectural, planning, engineering, and other services as necessary to assist the local education agencies (LEAs) in the development of a

LEA Master Plan, as part of a Necessity of School Construction application. As part of Basic Services, the EFP shall be responsible for assisting the LEA with the coordination, facilitation, and submission of all necessary documentation as necessary to complete a Necessity of School Construction application. All work shall be completed in conformance with all applicable statutes and the School Construction Regulations.

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, 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 Educational Facility Master Planning (EFP) services to LEAs for their Necessity of School Construction Applications, which includes a long term facility master plan.

All other things being equal, the services of qualified and capable vendors with offices in Rhode Island, or those who propose a joint venture with a Rhode Island firm, should be utilized.

SECTION 3: SCOPE OF WORK AND REQUIREMENTS

General Scope of Work

The Educational Facility Planner (EFP) shall provide architectural, planning, engineering, and other services as necessary to assist the LEA in the development of a LEA Master Plan, as part of a Necessity of School Construction application. As part of Basic Services, the Educational Facility Planner shall be responsible for assisting the LEA with the coordination, facilitation, and submission of all necessary documentation as necessary to complete a Necessity of School Construction application. All work shall be completed in conformance with all applicable statutes and the School Construction Regulations.

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

I. FACILITIES PLANNING and COORDINATION

The EFP shall be primarily responsible for proposing and implementing an approach to developing a Facility Master Plan (FMP) that:

- i. Engages multiple stakeholders including LEA and municipal representatives in the planning efforts;
- ii. Provides data and documents, including maps, plans, notes, and other forms of analysis and representation, as necessary to inform stakeholders at the necessary decision points;
- iii. Coordinates and facilitates meetings that meaningfully engage multiple stakeholders, including but not limited to students, parents, teachers, and administrators;
- iv. Work with the Owner's Project Manager to ensure that agendas are prepared and minutes are recorded
- v. Coordinates with Authorities Having Jurisdiction to satisfy all municipal, State and federal requirement and obtain all approval as necessary;
- vi. Develop a Facility Master Plan that addresses community demographics, the LEA's Educational Program, and the LEA and community's fiscal capacity;
- vii. Submit a Necessity of School Construction application to the School Building Authority at the RI Department of Education, including a Letter of Intent, Stage I, Stage II, and all necessary supplemental documentation necessary for approval;
- viii. Attend meetings with the RI Department of Education School Building Authority as part of the Necessity of School Construction application.

II. MASTER PLANNING

The EFP shall assist the LEA to prepare a long-range educational facilities master plan (FMP). The FMP should provide a comprehensive review, assessment, and intended improvements of all facilities in the District. Components of the FMP shall be coordinated with the requirements of the Necessity of School Construction application as articulated in the School Construction Regulations, and include at a minimum the following:

- i. **Enrollment Projections:** The LEA should provide either an independent 10-year enrollment projection or agree to the provided enrollment projection from RIDE SBA, if available. For planning purposes the LEA should use the 5 year enrollment projection. The objective is to determine the number of students for which the buildings should be designed. The projection should be at minimum based on a cohort survival ratio/student progression projection model and provide projections by grade level and by year. District demographics such as live birth statistics, population information, housing starts, and survival rates should all be combined to project the district's enrollment 10 years into the future.

Facility Analysis

The FMP must include a facility analysis. The School Construction Regulations state that, the Facility Analysis should list any deficiencies in the district's existing buildings. The Facility Analysis must be conducted by a licensed engineer and must include:

- ii. • Inspection and analysis of the building envelope (roof, walls, glazing, foundation, floor/slab)
- iii. • Inspection and analysis of the structural elements of the facility
- iv. • Inspection and analysis of all mechanical systems, including condition, age, energy efficiency, levels of ventilation, and compliance with American Society of Heating, Refrigerating, and Air Conditioning Engineers (ASHRAE) standards
- v. • Inspection and analysis of the lighting system, including condition, age, energy efficiency and lighting levels
- vi. • Inspection and analysis of all controls including lighting controls and sensors, energy management systems, emergency shutoffs
- vii. • Inspection and analysis of all fire, safety and security systems including emergency plans
- viii. • Analysis of the energy use (electric and heating and/or cooling) of the facility for at least the last two years, a survey of the facility systems, and recommendations for improving energy efficiency. The use of Energy Star Portfolio Manager or ComCheck software systems to benchmark the facility against other buildings or the Rhode Island Building Energy Code is highly encouraged.

LEAs are currently allowed to use the Jacobs Statewide Assessment School level reports to satisfy this requirement.

ix. Educational Program

The EFP shall assist the LEA in developing an Educational Program. Per the School Construction Regulations, the "Design and Educational Program means a comprehensive numerical and written description of a district's specific educational program for a specified number of students over a specified period of time, in a format prescribed by the Regents." The Educational Program must include:

- a. Educational Program Narrative: A thorough and in-depth description of curricular goals and instructional activities for each school in the LEA. This should include a description of grade configuration, school administrative organization, target student population, instructional program, a list of learning spaces, as well as support areas and external spaces. In addition the narrative must include hours of operation that include the instructional day, extracurricular activities, and any public access, as well as any and all security necessary to safeguard the facility and its inhabitants.
- b. Target Educational Specification: an itemization of spaces needed to support the educational program, including a numerical description of gross and net square footage of any affected existing facility. The educational specification is the numeric description of the ideal educational program and is usually created early in the process. As such, this document must be reconciled to the constraints of a proposed site, an existing building, budgets, and/or other factors, including RIDE 1.06 Space Standards, to create a Proposed Educational Specification (see below);

- c. Proposed Educational Specification: an itemization of spaces for the proposed project that reconciles the LEAs educational program. This document should include a comparison to the RIDE 1.06 Space Standards. This document must provide enough detail to provide the necessary information to develop a conceptual Schematic Design and a realistic construction budget;
- d. Space Relationship Diagram: a diagram that itemizes the uses and illustrates the spatial relationships between all the proposed programs. The Spatial Relationship Diagram should include all proposed spaces organized to reflect the proposed relationships including learning, support, administrative, and external spaces.

The Educational Program shall recognize that the planning process is an opportunity to create and modify facilities to be responsive to the teaching and learning in modern school environments. As such, the EFP shall assist the LEA in developing tools and processes to adapt the learning environments to best serve these needs. The SBA at RIDE recognizes that LEAs have a variety of approaches to learning and as such the physical environment can and should be designed to respond to these needs. The following example environments are provided for consideration during the planning process:

a. *Traditional Learning Environments*

Traditional Learning Environments (TLE's) are those typically associated with classrooms with a certain number of students and one teacher. RIDE SBA does not mandate and does not usurp LEA policy on class size, these environments (along with size standards) should accommodate no more than 25 students per classroom. The TLE is best defined in an environment that is instructor centered whereas the student and instructor meet in a common location is a set specific time. Common locations should be supported by additional space types in an effort to maximize the teaching and learning environment in the TLE design approach. Use of small group rooms, teacher collaboration spaces, use of commons and cafeterias, media centers and multi-purpose spaces that utilized adjacencies to support the classroom are effective means of increasing the effectiveness of the traditional classroom approach.

b. *Student Centered Learning Environments*

Student Center Learning Environments (SCLE's) are learning environments that reflect and support information based systems, that focus on and support the principles and activities that facilitate learning. SCLE's is an approach to design that encourages collaborative and independent learning, multi communications approaches, integration of technology and embraces problem and project based learning.

Because this approach is focused on the student, the space and design of the teacher/facilitator must accommodate this model. The 21st century has taught us that the role of the teacher is continuously evolving and will continue to evolve, therefore the space types must accommodate this flexibility for the instructor to practice much in the same way as the student. Flexibility, reliance on technology, ability to change space to accommodate multiple teaching models will be critical to successful space design. A movement away from the "teacher's desk" will be the rule rather than the exception, therefore technology, power, and storage should be considered.

c. *Blended Learning Environments*

Blended Learning Environments (BLE's) support information-based systems, teach information gathering, support analysis of data and critical thinking. Students in this environment are able to use this support to act on their newly created knowledge. The blended learning environment is best defined in the following characteristics:

- Learner centered instruction in which the learning is active and interactive;
 - Increase in interaction between learners, learner and instructor, learner and curriculum, and learner to outside resources;
 - Integrated assessment mechanisms that are both formative and summative.
- x. **Capital Improvement Plan:** The LEA shall provide a 5-year CIP, using the template as provided by the School Building Authority. Per the School Construction Regulations, the “Capital Improvement Plan is a long-range plan, typically five years, which identifies capital needs in a district and provides a funding schedule and timeline for implementation. The capital improvement plan allows for systematic evaluation of all projects at one time so that a district can anticipate future needs.”
- xi. **Community Engagement and Local Government Collaboration:** In advance and in coordination with an application for necessity funding, LEAs shall conduct a process of collaboration with community stakeholders. Community engagement in facility planning should include local communities and local governments to build a facilities master plan that shares a collective vision. By working collaboratively with local government, the plan will consider related comprehensive community plans, local codes/regulations, and fiscal capacity.

Though there are variations of how to engage a community driven process, there are key elements for successful community engagement, they include:

- **Educational Framework and Visioning** - This activity is aimed at conducting an in-depth discussion of how best practices for education are incorporated into and influence facilities. These discussions should focus on both structural goals of the LEA such as school size preferences and grade configuration models; as well as specific delivery models in areas of early childhood development, special education services, elementary/middle/high school instructional models, and career and technical offerings.
- **School Building Committee** - The primary purpose of this group is to be the community's representative for review of data and participation in the larger community outreach. The focus of this group must be on the representing the best interest of the district as a whole, while considering how this impacts individual schools and local communities. Each member of the task force is responsible for being a key communicator of this data and educational vision that can discuss issues/concerns the larger community audience. This group should be engaged from the beginning of the planning process until a facilities plan is created. The district must submit names and backgrounds of the members of the school building committee that shall be formed in accordance with the School Construction Regulations and provisions of the district's local charter and/or by-laws.
- **Site Meetings** - This process includes school site specific meetings allowing local community members to share ideas and concerns specifically related to the local

school site. These meetings also provide an opportunity to address short term maintenance and capital needs of each facility. These meetings can also serve to “recruit” stakeholders to be part of the district level steering committee/task force or participate in larger district-wide community forums.

- **Facility Options Development** - The role of the steering committee/task force should include participation in facility options development. There are several pathways to follow when deciding the direction of a district wide facilities plan that are influenced by several factors including: community/social demands, demographic trends, educational vision/framework, condition of facilities, and available funding. These factors all create different ideas on how to move forward to create the most effective facilities plan. This process should review the benefits and challenges of each option and review how each factor can influence another. Options should be presented in larger community forums to assist in determining the outcome of best refined recommendations for facility actions.
- **Community Dialogues/Meetings** - The purpose of larger stakeholder dialogues or meetings is to obtain feedback from the community regarding both the educational framework and options created as a result of that framework. Utilizing members of the steering committee/task force, educational consultants, and district personnel, presentation of data in a clear and concise manner is critical in obtaining essential feedback from the community. This community feedback, along with supporting objective data sets, will shape the decisions that come forth in a facilities master plan.

xii. Implementation and Funding Strategy

A Facility Master Plan must be strategically implemented and funded in order to effectively utilize the available resources. LEAs should leverage available municipal and state funding. Additional funding strategies available to LEA’s may include:

- **Establish and Use Capital Reserve Funds/School Building Authority Capital Fund-** Projects funded by capital reserve funds can be approved and reimbursed more quickly than bond projects. By not bonding, the State can save substantial amounts of financing cost that can be reinvested.

xiii. Site Selection, Assessment, and Consideration of LEA Utilization

a. Site Selection and Assessment

If the applicant is acquiring a new parcel of land for the project, the applicant shall provide in its Architectural Feasibility Study to RIDE SBA a completed, signed, and sealed description of the plot plan of the land to be acquired showing:

- Topographical and contour lines
- Adjacent properties indicating current land uses, access roads, deed restrictions, easements, protective covenants, right of ways, and environmentally sensitive areas such as waterways and wetlands.
- The acreage and dimensions of the tract proposed for acquisition
- Anticipated footprint of the proposed school

Site selection must be in accordance with all applicable municipal, State, and federal siting statutes and regulations, including the RIDE 1.05 Site Standards. The Facility Master Plan must include an evaluation of any proposed site that documents compliance with the above.

b. LEA Utilization Analysis

In accordance with the recently enacted School Building Authority legislation (RIGL 16-105-1), districts must reduce excess capacity by partnering with other districts, closing buildings, and altering grade configurations to maximize the utilization. EFP must assist LEA in providing a summary level utilization analysis of all district school facilities that takes into consideration enrollment projections and educational program.

xiv. Schematic Design

RIDE 1.00 applies to all new school construction and school renovations projects where the total cost exceeds \$500,000. 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. Architectural, engineering, project management, construction management, financial, and other professional services shall be procured by the districts for all projects. 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. Request for meeting should be emailed to Joseph da Silva at joseph.dasilva@ride.ri.gov or Manuel Cordero at manuel.cordero@ride.ri.gov. The meeting request must include status of project, level of documentation, and proposed meeting date and time.

The purpose of the documentation submitted during the Schematic Design is to document the continuing development of the school construction project and its major components and to project a project budget. The documentation should also demonstrate compliance with the most recently adopted version of NECHPS.

- ___ Project Narrative – Including Existing Conditions Analysis, Description of Proposed Solution, and Basis of Design Narrative
- ___ Site plan and Landscape Plan @ 1/16" = 1'-0"
- ___ Floor plans @ 1/16" = 1'-0" showing all partitions and door swings
- ___ Color Rendering
- ___ Exterior Elevations @ 1/16" = 1'-0"
- ___ Typical Building Wall Sections
- ___ Single line engineering diagrams
- ___ Outline specifications
- ___ City Planning Board submission
- ___ Civil Engineering Drawings (scale as required)
- ___ Project Schedule (Gantt Chart)
- ___ Site Engineering calculations
- ___ Code Analysis, including certification that proposed solution meets the Energy Code
- ___ Construction Cost Estimates (see Cost Estimate guidance below)
- ___ Project Budget (see Project Budget guidance below)
- ___ Project Cash Flow for projects funded by School Building Authority Capital Fund
- ___ Project Report
- ___ LEED™ Checklist Form (or equivalent NECHPS checklist)
- ___ Project Review Meeting
- ___ Educational Specifications
- ___ Hazardous Materials Testing and Evaluation

- __ Commissioning Agent Review Documentation (for MEP scopes of work)
- __ Life Cycle Cost Analysis – Comparison of Alternatives
- __ Approval / Acceptance by School Building Committee and/or School Committee

The following minimal guidance is provided regarding necessary descriptions of the cost estimate scope of work:

- a. Floor tile replacement must identify square footage and general location of replacement, as well as unit pricing used to establish the cost.
- b. Door and door hardware improvements must include a narrative with locations, quantities, and unit pricing.
- c. Emergency lighting and fire alarm devices must include locations, quantities, and unit pricing.
- d. Roof replacement requires roof drawing identifying existing roof and proposed roof, as well as HVAC and exhausts fans that may be replaced at the same time. Roof repairs require identification of problem areas, square footage of repair/replacement, and unit pricing.
- e. HVAC improvements require drawings and a narrative describing existing and proposed mechanical systems and all necessary appurtenances, with quantities and unit pricing.
- f. Electrical improvements require a narrative describing existing and proposed electrical systems and all necessary appurtenances, with quantities and unit pricing.
- g. Plumbing improvements require a narrative describing existing and proposed plumbing systems and all necessary appurtenances, with quantities and unit pricing.
- h. Exterior repairs must be identified, described in detail, and quantified as appropriate.
- i. Provide schematic design documents for site improvements, particularly any improvements that may change traffic patterns.
- j. Window replacements (where applicable) must include location of proposed window replacements, quantities, proposed window types, and unit pricing.

The following minimal guidance is provided regarding necessary components of Project Budgets:

- a. Combined total project soft costs, which include OPM, legal, design, and engineering fees, are capped at 20% of the estimated construction cost.
- b. Construction Contingency Maximum– 5% of total estimated construction cost
- c. Owner’s Contingency – 2% of total estimated soft costs
- d. Construction budget is set when the Schematic Design Budget is approved
- e. Commissioning test costs should be included in construction cost estimates (especially window projects)
- f. Districts with more than one school project may not transfer funds between schools without an executed amendment to the Memorandum of Agreement

III. NECESSITY OF SCHOOL CONSTRUCTION APPLICATION

The Educational Facility Planner (EFP) shall be primarily responsible for preparing and submitting the Necessity of School Construction application to the RIDE School Building Authority as necessary to attain approval for State aid for the LEA’s proposed projects. This includes, but is not limited to:

- i. Attend meetings with the RI Department of Education School Building Authority as part of the Necessity of School Construction application;
- ii. Submit all required documentation as detailed in the School Construction Regulations and the most recent version of the Necessity of School Construction guidance document;
- iii. Assist in the development of a project budget that is based on construction cost estimates of the Schematic Design documentation;

- iv. Assist in the development of the LEA Capital Improvement Plan and coordination with the LEA Financing Plan;
- v. Prepare schematic design documents for projects in the capital improvement plan seeking Council approval and/or schematic design documents for any new construction (as detailed above).

As part of the FMP, the LEA/Vendor will submit a Necessity of School Construction LOI, Stage I, and Stage II Application including all requirements on or before the due dates published in the Necessity of School Construction Guidance document. For FY 2019 the dates are:

Letter of Intent: Between June 1 and August 15, 2018

Stage I: Between August 1 and September 17, 2018

Stage II: On or before February 15, 2019

A Necessity of School Construction Application Guidance document is available at www.ride.ri.gov/sba. **Please note that these dates change annually and the vendor is responsible for monitoring RIDE's website for any deadline changes.** Additionally, the School Construction Regulations and/or the Necessity of School Construction process may change in FY 2019, and the requirements of this solicitation would apply to the most recent versions of the School Construction Regulations and the Necessity of School Construction application.

Please note these services are only for a Facility Master Plan and Necessity of School Construction Application submission. Districts anticipate issuing formal RFPs for design and construction administration of the plan after Council on Elementary and Secondary Education approval. LEAs will specify a preliminary project budget or range when soliciting proposals from vendors. Vendors are responsible for preparing schematic design documents as part of the Necessity of School Construction application process.

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.

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.

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 Educational Facility Master Planning, School Design, and Project Management. Include any past experience in Rhode Island K-12 educational facility planning, design, or construction. Scoring will be split between Educational Facility Planner qualifications/certifications and Architectural and Engineering Design Team.

2. **Capability, Capacity, and Qualifications of the Offeror** - Please provide a detailed description of the Vendor’s experience as an Educational Facility Planner, including specific experience with K-12 education. Document how much involvement in detail, the Educational Facility Master Planner will have in a project and their scope and role. 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 Educational Facility Planner services will be performed. Provide an understanding of the School Construction process in Rhode Island and how the Facility Master Plan fits in. Provide examples of past Educational Facilities Master Plans.

4. **Approach/Methodology** –Define the methodology to be used to ensure a robust facility master plan. What procedures will be used to engage stakeholders, maintain project schedules, assure compliance with School Construction Regulations, and ensure LEAs receive a Necessity of School Construction approval.

B. Cost Proposal

Individual communities or the Authority will solicit vendors on the MPA for specific projects. When requested, please provide a detailed budget and accompanying narrative describing the work. The budget provided shall include specific budget line items for all consultants and supporting narrative as to the associated scope of work to be provided by each party under your direction. This includes schematic design documents based on the preliminary budget range provided by the LEA.

The vendor must prepare a cost proposal reflecting the hourly rate or other fee structure proposed for this scope of service using the below cost proposal forms. Please ensure that the budget is presented by state fiscal year, which runs from July 1st through June 30th.

The Vendor estimates that its budget for work to be performed under this Agreement is as follows:

Expense Category	Estimated Expenditures		
	Year 1	Year 2	Year 3
1. Employee Salary and Benefits	0	0	0

1. Purchased Services	0	0	0
3. Supplies and Materials	0	0	0
4. Travel	0	0	0
5. Printing	0	0	0
6. Office Expense	0	0	0
7. Other: (describe)	0	0	0
8.	0	0	0
Subtotal	0	0	0
Indirect Cost *	0	0	0
TOTAL	0	0	0

It is understood and agreed that the amounts indicated above for the several line items are estimates of expenditures to be incurred by the Contractor on behalf of this Agreement and to be claimed by the Contractor for reimbursement under this Agreement. It is further understood and agreed that actual expenditures may vary from the estimates set forth above and that such variations shall not in themselves be cause for disallowance of reimbursement by RIDE; provided, however, that the Contractor shall notify the contract officer of the variance and obtain pre-approval, in writing; and provided further that unless permission of the contract officer shall have been obtained in advance, no expenditure shall be claimed by the Contractor for reimbursement by RIDE under this Agreement if such expenditure shall have been incurred in a line item category not listed above. Transfer of funds between categories requires prior written approval by RIDE. In no event shall the total amount of reimbursement claimed by the vendor under this agreement exceed the total approved contract amount.

*** Attach a copy of the approved indirect cost documentation**

*BUDGET DETAIL SHEET **

FISCAL YEAR _____

EMPLOYEE SALARY AND BENEFIT DETAIL (TOTAL COMPENSATION)**

NAME	POSITION TITLE	NUMBER OF HOURS	HOURLY RATE (including benefits)	SALARY and BENEFIT TOTAL \$

PURCHASED SERVICES DETAIL

NAME	POSITION TITLE	HOURS	HOURLY RATE \$	TOTAL \$

TOTAL REQUEST				\$
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OTHER EXPENDITURES DETAIL

EXPENSE CATEGORY	DESCRIPTION	TOTAL
Supplies and Materials		
Travel ***		
Printing		
Office Expense		
Other: <i>(describe)</i>		
Indirect Cost		
Total		\$

* Please include a detail budget sheet for each state fiscal year (July 1st – June 30th)

** Please round hourly rates to the nearest whole dollar and ensure there are no rounding differences with the extended totals.

*** Reimbursement for travel within the continental United States is limited to the per diem rates established by the General Services Administration (GSA). Per diem rates are posted at www.gsa.gov/perdiem.

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 Thomas.bovis@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 # xxxxx** 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”.
- a. One (1) printed paper copy, marked “Technical Proposal -Original” and signed.
- b. 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.
- f. One (1) Electronic copy on a CD-R, marked “Cost Proposal -Original”.
1. One (1) printed paper copy, marked “Cost Proposal -Original” and signed.
- g. 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.

- a. The cost proposal shall be typed using the formatting provided on the provided template.
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# xxxxxx**” 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