



Request for Qualifications for On-Call Master Agreement

University of Washington

Request for Qualifications

ON-CALL BIM INFORMATIONAL MODELING &
FACILITIES MANAGEMENT DATA

Submittal Deadline: May 7, 2019 at 3:00 p.m.

The University of Washington is soliciting Statements of Qualifications (SOQ) from qualified firms to provide on-call professional services for the development and execution of building informational modeling (BIM) and facilities management (FM) data (BIM & FM) standards to be used in capital project delivery by the UW Facilities | Project Delivery Group (PDG), and other departments and locations at the University of Washington. The goals for the BIM & FM standards are listed below.

1. Encourage the use of open standards.
2. Incorporate industry best practices.
3. Enable enhanced collaboration among project teams: architects, engineers, contractors and internal stakeholders.
4. Build processes that create efficiency and improved project delivery.
5. Facilitate project transition to occupancy, operations, and maintenance.
6. Facilitate ease of use by the University's staff in operating and maintaining facilities as well as for tracking and managing space.
7. Leverage the past experience of BIM & FM projects at the University.

Master Agreements: The University intends to select one (1) firm under an on-call Master Agreement that will have no specific scope of work or contract amount. As individual projects arise, the parties will negotiate the scope of work and fee and formalize it in a project authorization. Project authorizations under each Master Agreement must be executed prior to the expiration of the Master Agreement. The initial term of the Master Agreement will be two (2) years with an option for the University, with the consultant's concurrence, to extend the Agreement by amendment for an additional two (2) years (for a maximum of four years). Hourly rates

established for the Master Agreement will remain in effect for the initial two-year term of the Master Agreement. Upon request of the consultant the hourly rates will be subject to renegotiation for the optional two-year term, and new rates, if approved, shall be authorized by an amendment to the Master Agreement.

Scope of Services: The services under the Master Agreement include development of general university standards, as well as support to specific projects. Services may include, but are not limited to the following:

- I. Collaborate with the University stakeholders to implement BIM & FM standards for capital project delivery through a three-step process: Assessment, Implementation Strategy and Creation.
 - A. Conduct an assessment of current BIM & FM practices
 - a. Evaluate and assess the use of BIM & FM across University projects and within the operational groups on the University of Washington campuses. Engage project teams and internal departments about the following BIM & FM applications:
 1. Transition to Occupancy (T2O)
 - a. Collect information from project teams to enable University personnel to operate the facility. This includes:
 - i. Plans
 1. Facility Acceptance
 2. Facility Staffing (roles and responsibilities)
 3. Preventative maintenance program (schedules and tasks)
 4. Equipment start-up and shutdown
 5. Emergency response
 6. Space identification and assignment
 - ii. Data

1. Construction Operations Building information exchange (COBie) data for import to computerized maintenance management software (CMMS).
2. Space identification, assignment & intended-use data for populating the Space Inventory Management System (SIMS).
3. Autodesk AutoCAD floor plans and ESRI shapefiles or map packages for populating geographical information systems (GIS)
4. Existing asset and preventative maintenance data to be removed from computerize maintenance management system (CMMS), if applicable.

iii. Other content

1. Occupant instructions for use of special equipment and spaces
2. Preventative maintenance program (schedules and tasks)
3. Confirmation of heritage assets removed/replaced and preventative maintenance that is no longer required, if applicable.

2. Design Authoring

- a. Coordination of design consultants including architects and engineers in 3D space for:
 - i. Federated design coordination model
 - ii. Drawing production
 - iii. Design review

3. 3D Coordination

- a. Coordination of trade partners / contractors in 3D space for:
 - i. Coordination of installation
 - ii. Capturing as-built conditions

- b. Identify areas for improvement and provide respective cost to benefit scenarios of multiple BIM & FM applications.

B. Establish an implementation strategy for University BIM & FM standards

- a. Leveraging the BIM & FM assessment and the most advantageous areas for improvement, establish goals and an implementation strategy for reaching identified BIM & FM uses.
- b. Produce stakeholder management plan for engaging main stakeholders for each BIM goal across the project life cycle.

C. Create University BIM & FM standards

- a. Develop BIM & FM Standards that address BIM & FM applications associated with near-term goals identified in the implementation strategy.
- b. Develop BIM & FM Standards that are scalable to serve a range of project sizes (small to large) and integrate with various project delivery methods (GCCM, Design-Build, Design-Bid-Build).
- c. BIM & FM Standards shall include BIM & FM Execution Plan for inclusion into projects.
- d. Evaluate current UW contracting and project management procedures for points of integration with, and revisions to, solicitations, contracts, general conditions, and specification sections and develop revisions to these documents.

- e. Process maps shall be provided for each BIM & FM use and include operational acceptance, archival / import, and access of BIM & FM deliverables.
- II. Collaborate with project delivery group teams to implement BIM & FM standards on specific projects and provide Facility Data Integration Services
- A. Develop examples and templates of BIM & FM deliverables for specific projects
 - a. Create examples and templates of the BIM & FM uses identified in the standards that project teams may dissect to understand what their deliverables should look like and foster a 'begin with the end in mind' perspective.
 - B. Support and manage BIM & FM execution on specific projects
 - a. Support Project BIM & FM execution plan integration to align project with University BIM & FM Standards.
 - b. Review BIM & FM deliverables for alignment with University BIM & FM Standards and report on project status.
 - c. Engage University stakeholders / end-users of BIM & FM activities throughout the project.
 - d. Coordinate and support the turnover of project BIM & FM deliverables to appropriate stakeholders / end-users. Support initial operational use of deliverables.
 - e. Work with University staff to develop competencies necessary for self-sustaining data integration services

The selected firm will work under the direction of UW Facilities, Project Delivery Group, and will work closely with Maintenance & Construction, Campus Utilities and Operations, Asset Management, Engineering Services, Environmental Health & Safety, UW Information Technology, and specific project teams, as appropriate.

Submittal Requirements and Evaluation Criteria: The SOQ must include and will be evaluated based on the following criteria. Each firm's SOQ is limited to 10 sheets of paper, printed double-sided, and must include an index and be organized by discrete sections corresponding to the criteria and in the same order as listed below. Dividers and the index are not counted in the 10-sheet limit.

- 1) **Cover Letter:** A cover letter expressing interest, addressing, at a minimum, the following:
 - A. A high-level summary of your firm's relevant qualifications.
 - B. Acknowledge that you have reviewed any addenda issued to the RFQ, as posted on the University's website.
 - C. Outline the size of your firm and discuss your firm's capability to manage one or more projects of the indicated size, on an on-call basis.
 - D. Discuss your firm's historical workload.
 - E. Discuss your firm's financial and organizational stability.
 - F. Identify the office that will manage and administer the projects, as well as the office that will develop the services requested.
 - G. The name and contact information of the individual in your firm that the University should contact regarding questions about your SOQ and scheduling a potential interview. The contact information should include the following: name of individual, title, firm name, address (city, state, and zip code), telephone number, and e-mail address.

- 2) **Relevant Experience of the Firm:** Demonstrated expertise and experience of the firm in working with institutions to develop and execute BIM & FM standards. Specific criteria include:
 - A. Experience conducting assessments of the use of BIM & FM, including transition to sustainable occupancy and operations, design authoring and 3D coordination, within complex organizations.

- B. Experience developing goals and strategies for implementing BIM & FM with a variety of stakeholders in complex organizations
- C. Experience creating BIM & FM standards and BIM execution plans within specific projects.
- D. Experience collaborating with project teams (owners, architects, engineers, and contractors) to execute BIM & FM standards and BIM execution plans.

3) Project Management Approach:

- A. Describe the firm's experience facilitating groups of diverse stakeholders within an institution to reach consensus on new protocols, develop implementation strategies and execute BIM & FM applications.
- B. Demonstrated competence in the supervision, coordination, communication, quality assurance and control related to BIM & FM applications and project administration of your own and your sub-consultants' work.

4) Staff Experience and Availability: A description of the staff proposed for performing any work as outlined in this RFQ that may be assigned, that demonstrates relevant experience from other projects. Include a copy of the resume of the proposed principal-in-charge and any other key members of the firm, including at least two project managers who will be directly responsible for the oversight and execution of any work that may be assigned. Discuss your strategy for staffing various projects over a two to three year period, and the availability of specific team members being proposed.

- 5) **References:** At least three (3) project owner references for work completed by your firm. References should be selected from projects prominent in your SOQ. Cited references should include project name, reference name, title, project role, and current contact telephone number. Refer to the Selection Process section of this RFQ for information about how reference checks will be used in the evaluation process.
- 6) **Acceptance of the University's Standard Agreements:** The University intends to utilize its standard Master Agreement for Professional Services for the work resulting from this RFQ. This Agreement is available for review on the Project Delivery Group website at: <https://cpd.uw.edu/resources/contracts-forms>. Select the 'Master Agreement for Professional Services OA4'. Each firm must affirm in this section of the SOQ that the terms and conditions of this agreement is acceptable, or if the firm takes exception to any of the proposed language in the agreement, the firm must specifically describe the reasons for the exceptions and propose in this section of the SOQ alternative language for review and consideration by the University. The University makes no commitment that it will modify any of the terms of this standard agreement based on the firm's suggestions. Firms should not comment on the terms of Attachment A to the Agreement that includes compensation provisions. Failure to respond to this item may result in the University eliminating the firm's SOQ from consideration.

Weighting of Evaluation Criteria: The SOQ will be evaluated based on the following points for each evaluation criterion:

	SOQ Evaluation Criteria	Weighting (Maximum Points)
1	Cover Letter	5
2	Relevant Experience of the Firm	35
3	Project Management Approach	30

4	Staff Experience and Availability	30
5	References	No points
6	Acceptance of the University's Standard Agreement	No points
	Total Points:	100

Submittal Deadline: One (1) original, and one (1) USB thumb/flash drive containing a copy in PDF format of the Statement of Qualifications containing the above-listed information must be received at the University Facilities Building no later than the submittal deadline stated on the first page of this RFQ, or as modified by any subsequent addenda. Submittals sent by mail or courier shall be sent to the address below (use box number for U.S. Postal Service (USPS) delivery only). Faxed or e-mailed submittals will not be accepted. Firms are responsible for ensuring receipt of the SOQ at the University Facilities Building by the deadline stated above, and should take into account internal UW delivery times once USPS delivers a submittal to the box number indicated, and other delays that may occur when using a delivery service. Submittals received after the deadline will not be considered.

University of Washington
Project Delivery Group
Attention: Jeff Angeley
University Facilities Building
Box 352205
Seattle, WA 98195-2205

Any addenda issued for this RFQ will be published at the following website address: <https://cpd.uw.edu/project-delivery/current-solicitations>, within the 'Current business opportunities' box. Firms are responsible for checking the website for any addenda prior to submission of qualifications. If you are unable to download the addenda, you may contact the individual noted at the end of this RFQ.

Selection Process: The SOQs will be scored by an evaluation committee and the most qualified firms may be invited by letter to an interview. The firms will be evaluated in the interview based on the following points for each interview evaluation criterion listed below:

	Interview Evaluation Criteria	Weighting (Maximum Points)
1	<u>Type of Work:</u> The firm’s understanding of, and approach to, the requirements of the type of work included in the Master Agreement.	30
2	<u>Personnel:</u> Relevancy of experience and knowledge of the work of the Master Agreement.	25
3	<u>Communication:</u> Interpersonal communication between team members and with the interview committee.	25
4	<u>Presentation and Questions:</u> Clarity of expression and thoroughness in the firm’s presentation, and in providing insightful answers to questions asked by the interview committee. Quality of questions asked by the firm.	20
	Total Points:	100

The most highly qualified firm(s), based on the total points from the evaluation of the SOQs and interviews, will be invited to enter into negotiations with the University. If the University and the most highly qualified firm(s) cannot agree on terms that are fair and reasonable, the University may enter into negotiations with the next most highly qualified firm.

Anticipated Consultant Selection Schedule

Issue Request for Qualifications	April 16, 2019
Statements of Qualifications due at 3:00 p.m.	May 7, 2019
Selection and notification of firms to possibly be interviewed	May 14, 2019
Possible Interviews of selected firms	May 21-23, 2019
Announcement of highest-scoring firm	May 24, 2019

Only one firm will be selected at this time. Information from sub-consultants should not be included in the SOQ. The University expects to work with the selected firm to finalize the involvement of sub-consultants for each assigned project prior to authorization of work for each assigned project.

The University reserves the right to conduct reference checks for the highest scoring firms either after qualifications have been evaluated, and/or after interviews have been held. In the event that information obtained from the reference checks reveals concerns about a firm's past performance or their ability to successfully perform the work of the Master Agreement to be executed based on this RFQ, the University may, at its sole discretion, determine that the firm is not qualified to move forward in the selection process and/or enter into negotiations with the University. In conducting reference checks, the University may include itself as a reference if the firm has performed work for the University, even if the firm did not identify the University as a reference. Likewise, the University reserves the right to check references for the firm from other owners and designers even if they were not identified by the firm as references in the Statement of Qualifications submitted.

Business Equity Enterprises

Please indicate if you identify as a small businesses, minority-owned businesses, women-owned businesses, and other historically marginalized businesses, herein referred to as Business Equity Enterprises (BEE). BEE include any entity licensed to do business in the State of Washington, including a corporation, partnership, sole proprietorship, or other legal entity that meets any of the following:

Certified Business Enterprise (CBE): Any business enterprise certified with the Washington State Office of Minority and Women's Business Enterprises.

Lesbian/Gay/Bisexual/Transgender Business Enterprise (LGBTE): More than 50% owned and controlled by at least one person who is a member of the LGBT community.

Minority Business Enterprise (MBE): More than 50% owned and controlled by at least one person who is a member of one or more of the following minority groups:

- Asian Pacific American
- Black American
- Hispanic American
- Native American
- Subcontinent Asian American

Minority Women's Business Enterprise (MWBE): More than 50% owned and controlled by at least one woman who is a member of one or more of the above minority groups.

Small Business Enterprise (SBE): A business entity that:

Can attest that it is owned and operated independently from all other businesses and;
Conforms to the U.S. Small Business Administration Size Standards of the North American Industry Classification System (NAICS) Codes in which it is to be engaged at the UW; or is certified with the OMWBE

Veteran's Business Enterprise (VBE): Certified with the Washington State Department of Veteran's Affairs (DVA)

Women's Business Enterprise (WBE): More than 50% owned and controlled by one or more women.

Questions: All questions regarding this RFQ should be addressed to Jeff Angeley, Assistant Director, Project Delivery Group, at (206) 543-4673, or by e-mail at angeley@uw.edu.

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