

UNIVERSITY OF MASSACHUSETTS AMHERST

REQUEST FOR QUALIFICATIONS
COST CONSULTANT SERVICES



RFQ AA09-JM-3145

DECEMBER 2008

SUBMITTED BY THE AMHERST PROCUREMENT DEPARTMENT

SPONSORED BY THE FACILITIES & CAMPUS PLANNING DEPARTMENT

THE UNIVERSITY OF MASSACHUSETTS - AMHERST

**REQUEST FOR QUALIFICATIONS:
COST CONSULTANT SERVICES
RFQ AA09-JM-3145**

1.0 Notice

In response to this Request for Qualifications (RFQ: AA09-JM-3145) for Cost Consultant Services, the University of Massachusetts Amherst (UMass Amherst) is seeking proposals from firms specializing in conducting cost consultant services in Higher Education.

It is the intent of UMass Amherst to award up to two (2) On-Call Cost Consultant Contracts for a total contract value of \$1,000,000 each.

The term "Respondent" as used herein means any prospective Cost Consulting firm(s) or team(s) that will respond to this Request for Qualifications.

The Respondent shall demonstrate expertise in advising Owners on construction costs for the following types of Higher Education buildings including, but not limited to, science and research laboratories; academic; performing arts; libraries; athletic facilities; student housing; and dining facilities. The Respondent will have experience in construction cost consulting for building infrastructure elements including site utilities; streetscapes; and landscape elements, and in estimating professional services fees for such facilities. The scope of services is further described below.

**Proposals shall be received no later than 2:00 PM on Thursday, January 22, 2009.
Proposals shall be addressed and delivered to the**

**University of Massachusetts Amherst
Procurement Department
Room 407 Goodell Building
140 Hicks Way
Amherst, MA 01003-9334
Attention: RFQ AA09-JM-3145**

Each Statement of Qualifications shall clearly identify the Respondent's name and business address. One original, clearly marked as such, and six (6) copies of each Statement of Qualifications shall be submitted to UMass Amherst. Please print the following in the lower left hand corner of all envelopes and/or packaging:

**Cost Consultant Services, RFQ AA09-JM-3145
Proposal Submission Deadline: 2:00 PM, Thursday, January 22, 2009**

Statements of Qualifications delivered late or to another location will be rejected and filed unopened in the procurement file.

Submissions shall be printed on both sides of the sheet (8 1/2" by 11").

All questions from prospective firms concerning this RFQ shall be referred to the Director of Procurement, by email or fax only, by 5:00 PM, Friday January 7, 2009. His contact information is:

John O. Martin, MCPPO
Director of Procurement
University of Massachusetts –Amherst
Fax: (413) 545-1643
E-mail: jomartin@admin.umass.edu

Inquiries received after the specified date and time will not be accepted. The University will issue an addendum to all prospective firms as required and deemed necessary by 5:00 PM on Monday January 12, 2009.

2.0 Overview

The Amherst campus was originally founded in 1863 as the Massachusetts Agricultural College with approximately 18 structures and barns on more than 383 acres. In 1930, the Massachusetts Agricultural College evolved to the Massachusetts State College, and then in 1948 to the University of Massachusetts Amherst. Currently, the Amherst campus is the flagship and largest campus in the University of Massachusetts 5-campus system. The campus community of 30,000 includes a student enrollment of approximately 24,600 as well as 5,500 faculty and staff. The main campus is comprised of over 1,400 acres and includes over 350 structures.

As the campus has evolved to the status of a major public Research I institution, the demand for facilities that support modern research and teaching have increased dramatically. Today, the campus is engaged in a major capital construction program to build new and renovate existing facilities to meet these demands. The campus is engaged in planning for the next major capital program and as part of this planning and programming cycle, the campus is initiating these services to assist it in planning specific building projects, determining and integrating project budgets with design intent, monitoring costs throughout the life of major building projects, and developing a cost estimating and tracking database system.

UMass Amherst hereby requests the submittal of Statements of Qualifications from highly qualified cost management firms with previous construction cost estimating experience to provide professional cost management services including all activities required to undertake and accomplish comprehensive cost management consulting services on an on-call basis.

This on-call, cost management consultant service will include, but not be limited to: construction and project cost advice and analysis on a variety of construction and use group types. The number of assignments issued will be at the discretion of UMass Amherst on an as needed basis in order to manage and project the anticipated cost of construction of various projects under its authority. These services may be required throughout the design process including the conceptual, schematic, design development, contract document, and bid and contract administration phases. The on-going value management process will insure that projects are maintained within the total approved project cost.

3.0 Description

The University of Massachusetts (UMass Amherst) is seeking a cost consulting firm, or team, with demonstrated expertise in providing professional cost consulting services, and to provide such services on an On-Call basis. The Respondent shall highlight its experience in providing similar cost management consulting services for all types of facilities identified above on an On-Call basis for programs of similar size and complexity. The Respondent shall demonstrate its ability to work closely with UMass Amherst and other interested parties including, but not limited to, academia, architectural and design firms, owner's representatives, construction managers and general contractors, and other consultants. The Respondent shall demonstrate expertise in cost control consulting on projects of various sizes and complexity ranging in value from few hundred thousand to few hundred million.

The Statement of Qualifications shall clearly identify the individuals responsible for each technical discipline.

The selected firm will be required to enter into a standard University Contract for Services. The successful vendor must sign the standard University Contract for Services and agree to all Terms and Conditions listed. A copy of the University Contract for Services can be viewed at: http://www.umass.edu/procurement/Fill-In_Forms/CFSL_RE_060208.pdf

Respondents must indicate in their response if they are not willing to sign the Contract without exception. Given the long term nature of the UMass Amherst Capital Plan, the term of the contract is envisioned to be a multi-year commitment. Any vendor indicating that they are not willing to sign the University Contract for Services may be eliminated from the process either during the review process or during the final contract negotiation process at the discretion of the University.

4.0 Scope of Services

The Scope of Services shall include but not be limited to the following:

1. Assist UMass Amherst in determining a capital plan budget integrated with an assumed design basis for the new construction or modernization projects. Assist UMass Amherst in developing design approach cost opinions for conceptual building projects, evaluating a range of shell and interior quality options for a range of building types.
2. Provide specific project Design Intent Document based on a selected conceptual cost model for new a proposed new construction project, to be used as a basis for study and design by the Designer of Record and its cost estimating consultant.
3. Provide a timely review of cost estimates provided by other UMass Amherst consultants and design firms for reasonableness, accuracy in terms of Western Massachusetts construction market, and to update UMass Amherst cost databases.
4. Evaluate sustainability features and payback periods, operating and maintenance costs, and life cycle analysis for proposed building projects.
5. Participate as an advisor to UMass Amherst with its architectural and engineering consultants in a cost management and/or value engineering process, and in project review workshops to identify potential cost savings in order to assure that project construction costs are within the allocated funds.

6. Work with and make necessary presentations to UMass Amherst to assist in the planning and construction review and approval processes.
7. Provide benchmarking analysis of proposed projects.
8. Assist in developing a construction cost database for UMass Amherst using both historical costs and data collected from future projects.
9. Establish and assist UMass Amherst in maintaining a specific UMass Amherst-life cycle cost model for building design.

4.1 Sample Assignments

Sample Assignments may include, but not be limited to the following:

1. Provide total project cost opinions for a proposed, conceptual building project, evaluating interior finish and programming options, and including site work, utilities, structural, mechanical, electrical, and landscape elements, design fees, contingencies and change order allowances. Prepare a Design Intent Document to be handed off to be used by the Designer of Record to provide consistency between project budget assumptions and final design approach.
2. Reconcile the cost estimates which have been provided by the Architect and the Construction Management team and facilitate consensus among the stakeholders,
3. Evaluate operating and maintenance costs for a building, with special attention to the effect of sustainable design features, evaluate the economics of energy performance upgrades, impact on capital and operation and maintenance costs.
4. Design and compile a database of construction costs for various building types which facilitates comparison of costs by category, and can be used by in-house Facility planners as well as out-of-house design teams to better estimate UMass Amherst building costs based on our historical cost averages and the Western Massachusetts construction market.

5.0 Evaluation Criteria

Request for Qualification submittals shall be responsive to and shall be evaluated based on the following Evaluation Criteria; respondents are also asked to organize their responses in the following manner:

1. **COVER LETTER**

To include the name of Firm, address and telephone number, signed in ink by an authorized representative of the vendor. Acknowledge any addenda, if any, and include an affirmation that the Statement of Qualifications is in accordance with this RFQ, and that the Respondent understands all sections and provisions therein. Any exceptions must be clearly stated.

2. **DESCRIPTION OF FIRM**

History and description of firm indicating principal business of firm and complete description of in-house services. Include both the total number of personnel in each discipline and the number of personnel holding professional registration.

Include a description of the availability and geographic location of the Project

Manager and other key team members, ability to respond to multiple on-call requests in a timely and effective manner, and the ability to work closely with UMass Amherst and other interested parties.

3. PROJECT ORGANIZATION & RESUMES

Provide an organization chart identifying the key persons that will be assigned to this contract including principal-in-charge, project manager, cost estimators, and other support personnel. Submit resumes of each of these key individuals identifying their education and recent experience relevant to the services required for this project.

Submitting firm must be prepared to contractually commit all individuals as submitted in their Statement of Qualifications to provide the services requested. Any deviation from the proposed project team will constitute a breach of Contract to any agreement which may result from this Request for Qualifications.

4. PROJECT EXPERIENCE

Provide a list and description of similar project experience for the primary firm and all key consultants that demonstrate the firms' current qualifications for this project, organized in two sub-sections:

- Relevant On-Call experiences of the firm in Higher Education, including any UMass Amherst experience.
- Other relevant experience of the firm.

All experience summaries should include:

- a. Name of Project
- b. Owner representative
- c. General scope and dollar value of project
- d. Period of performance
- e. Firm Project Manager and Principal-in-charge of project

5. CONSULTANTS

List any and all specialists and consultants that will be utilized on this project as a sub-contractor to the firm. Submit complete description of the consultant firms, resumes of their key individuals who will be assigned to this project, and their specific roles in the project.

6. PROJECT APPROACH

Describe the organization and responsibilities of the primary firm and the consultants, suggested/recommended approach to SAMPLE ASSIGNMENTS listed above, and any relevant lessons learned from prior experience.

Include a discussion on the origin, sources of cost data, examples of other databases and other building cost models consultant has prepared.

7. COMPENSATION / FEES

Provide a listing of hourly rates for the personnel identified or who would be assigned to this project, including the Principle-in-Charge.

This request for Statement of Qualifications does not create any contractual relationship between the University of Massachusetts Amherst and any party. The University reserves the right to accept or reject any or all proposals submitted for this project.

8. ADDITIONAL INFORMATION

Provide any additional information deemed necessary by the firm to describe any characteristics or qualities beyond what is specified in the submission requirements in order to assist the University in evaluating a specific Statement of Qualifications.

9. CURRENT CLIENT LIST

Provide a list of current clients including the name of the Principal-in-charge and their address and telephone number.

10. FINANCIAL STATEMENT

Provide a copy of the firm's Corporate financial statements with the Statement of Qualifications for the previous calendar years attested by a CPA or Bank Officer. In respect of confidentiality, this may be submitted (one copy) in a separate envelope and marked as to identify the contents. This information will only be used if financial information provided in the submittal is not adequate to communicate financial capabilities. If you do not provide financial statements, you must include a letter to that effect and provide some other means to determine the financial status of your company. UMass Amherst reserves the right to request additional financial information from any Respondent who does not submit adequate information to allow the Town to make a reasonable determination of financial capability and stability.

11. INSURANCE

Professional liability insurance: \$1,000,000

Submit copy of insurance certificate or letter indicating intent to purchase such if awarded this contract.

6.0 Selection Process

Evaluation of the Statements of Qualifications will be conducted by a selection team appointed by the Director of Facilities and Campus Planning. The judgment of the evaluators will be based upon the evaluation criteria set forth in this RFQ and shall be final.

UMass Amherst plans to shortlist an appropriate number of firms based upon its evaluation of the Qualifications Statements submitted in response to this solicitation. The short listed firms will be asked to provide presentations. Final selection will be made based upon the Selection Committee's evaluation of the Qualification Statements and the Presentations.

Respondents whose submittals are determined to be not advantageous or did not meet the minimum requirements will not be interviewed. In accordance with those interviews, the evaluation team will then rank those finalists and make a recommendation of award to the Director, Facilities and Campus Planning, the awarding authority on this project. If UMass Amherst is unable to negotiate a contract with the top-ranked finalist, UMass Amherst will then reject the first placed finalist and commence negotiations with the next ranked finalist and so on, until a contract is successfully negotiated and approved by UMass Amherst.

7.0 Proposed Schedule

- Advertise Request for Qualifications: Wednesday, December 17, 2008
- Vendor Questions Due: @ 5:00pm Friday January 7, 2009
- University Responses Due: @ 5:00pm Monday January 12, 2009
- Request for Qualifications Due: @ 2:00pm Thursday, January 22, 2009
- Vendor Interviews: February 2009
- Vendor Contract Notification: March 2009

8.0 General Terms

This Request for Qualification is solely an invitation to consultants to provide information about professional qualifications to UMass Amherst and is not an offer to contract. Furthermore, this request does not obligate UMass Amherst to pay any costs that any Respondent may incur in the preparation of its response. All costs associated with the preparation of a response to this request shall be borne solely by the Respondent. All submitted responses shall become the property of UMass Amherst and shall not be returned.

Information submitted for qualification evaluation will be considered confidential and UMass Amherst will maintain its confidentiality to the extent permitted by law.

UMass Amherst may cancel this RFQ, in whole or in part, or may reject all Responses, or may procure only some services outlined in this RFQ whenever such action is determined to be in the best interest of UMass Amherst. UMass Amherst may request that supplementary information be furnished to assure UMass Amherst that a Respondent has the technical competence, the business and technical organization, and the financial resources adequate to successfully perform the necessary work.

Minority-Owned Business Enterprises (MBE) or Woman-Owned Business Enterprises (WBE) are strongly encouraged to submit proposals in response to the RFQ. For the purposes of this RFQ the term MBE or WBE shall mean a consultant who is certified as a minority business enterprise by the State Office of Minority and Women-Owned Business Assistance (SOMWBA), and who is still certified at the time the Respondent's Qualifications are submitted.

All minority owned businesses are encouraged to apply for SOMWBA certification. For further information on SOMWBA qualifications, or access to SOMWBA vendor lists, contact the State Office of Minority and Women-Owned Business Assistance at (617) 727-8692 or go to <http://www.somwba.state.ma.us/> for more information.

Person signing below acknowledges that s/he is an authorized representative of the bidder and agrees to all terms and conditions listed in this RFQ.

Company Name: _____

Address: _____

Submitted By (Please print): _____

Signature: _____ Date: _____

Fax #: _____ Telephone #: _____

Email Address: _____

***** END OF REQUEST FOR QUALIFICATIONS *****