UNIVERSITY OF MASSACHUSETTS AMHERST
PHYSICAL PLANT DIVISION
REQUEST FOR PROPOSAL

AA17-PR-5157

JANUARY 2017

Review the University Of Massachusetts Physical Plant Control Department, Work Flow, Policies, & Mission
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I. GENERAL INFORMATION

A. Introduction

1. The University of Massachusetts at Amherst (UMA) Physical Plant Controls Group operates and maintains automatic temperature controls for HVAC serving approximately 7.8 million square feet of assignable space, including classrooms, offices, public spaces, laboratories, clean rooms, data centers and sensitive research areas. This includes the use of JCI’s Metasys Building Automation System. The Physical Plant Controls Group handles about 2700 work requests a year.

1.1 UMA is looking to have the Controls Group evaluated in order to improve its efficiency & effectiveness. The contractor will make recommendations to improve the organizational structure and function of the group. Aspects of effectiveness include:
   a. Customer Satisfaction
   b. Energy Performance
   c. Cost-Effective Maintenance and operation of equipment.

Successful bidder should have technical expertise and experience with Building Automation Systems, temperature controls, heating ventilation and air conditioning as well as maintenance management in a unionized, higher education research institution setting.

II. SCOPE OF SERVICES

A. General

This successful bidder of this contract will review the day to day operation of the UMA Physical Plant Controls Group from the work task initiation, delivery of service, to documentation and closure of the work task. Included in this review will be an evaluation of the current work flow and staffing effectiveness with recommendations. At the conclusion of the contract UMA will be in possession of 2 written & 1 electronic report(s) of sound industry advice concerning the operation of the UMA Controls Department. All policies and procedures will have been reviewed, discussed and brought up to date. New policies and procedures will be developed where needed. Including forms, logs and check sheets needed.

B. Services Required including but not limited to:

1. Review current use of labor resources. This includes all Controls Group labor and management. Are we staffed correctly?
   a. Examine & recommend use of overtime, call back, and stand by time, and how to reduce these costs without compromising service
   b. Evaluate skill levels
   c. Evaluate staffing levels during all three shifts
   d. Evaluate supervision and management staffing
   e. Purchasing and procurement
   f. Support from outside contractors
   g. Review and revise current position descriptions
   h. Develop job descriptions for new positions if needed or recommended

2. Review the Controls Group process for scheduling work and planning tasks and recommend changes to be more effective.
   a. How should work tasks be prioritized and scheduled?
   b. Who should close out work tasks and review what the problem was and how it was resolved?
   c. Who should enter information for the customer on job resolution?
   d. How can the Tririga Computerized Maintenance Management System be used most effectively by the Controls Group?
3. Evaluate the effectiveness of engineering support for the Controls Group.

4. Evaluate staff use of the Building Automation System.
   a. Use of trends and reports
   b. Appropriate diagnostic techniques
   c. Use of alarms
   d. Familiarity with software and hardware
   e. Proactive monitoring and resolution of issues before complaints arise
   f. Resolution of underlying issues to minimize repeat calls

5. Evaluate the effectiveness of the Controls Group preventive maintenance capacity and function, including: prioritization, equipment, tasks, and frequency.


7. Make recommendations on improving communication between the Controls Group, end users, and other work groups within the Facilities & Campus Services. This will include interviewing stakeholder groups.

8. Develop effective tools for measurement of customer satisfaction, accounting for the diverse customer base that includes research, academics, faculty, students, and administrators.

9. What factors contribute to our present complaint-driven reactive approach? How can a more proactive culture be established?

10. Review and make recommendations on current training program(s).

III. PROJECT SCHEDULE

A. Schedule:

The following is the planned schedule for the project:

- Award contract – estimated time frame by March 1, 2017

IV. INFORMATION PROVIDED BY UMA

A. Pre-Proposal Submittal Conference

1. A pre-proposal submittal conference will be held on January 31, 2017 at 11:00 a.m. in the Physical Plant Conference Room (201), 360 Campus Center Way, University of Massachusetts, and Amherst, Massachusetts. Parking is available for a fee at the Campus Center Garage, which is just up the street from the Physical Plant Building.

B. Documentation

1. The successful respondent will receive all documents and procedures the Physical Plant has available to help them successfully complete their contract.
V. PROPOSAL SUBMISSION REQUIREMENTS

A. Bid Submission

1. All proposals must be received via BID EXPRESS before 2:00 p.m. on February 15, 2017. ONLY ELECTRONIC PROPOSALS may be submitted at the bidexpress.com website. All electronic bidders must first register on bidexpress.com and create an info tech digital ID and it is highly recommended that a Digital ID be enabled at least 48 hours in advance of submitting an electronic proposal. A fee of $25.00 will be incurred for bidding electronically on a pay-per solicitation basis; alternatively you may subscribe for $50.00 per month to have access to all solicitations and email notifications. For additional guidance, please contact the Bid Express Team at toll free (888) 352-2439 (select option 1) or at support@bidexpress.com The proposal subject line must read: "AA17-PR-5157 – submitted by [bidder name]. To be considered complete, all bids must include the following information:

   a. Description of Firm. History and description of firm indicating principal business of firm.

   b. Project Organization. List the key people that will be assigned to this project including principle-in-charge or project manager. Submit information regarding these key people, identifying their education and recent, relevant experiences in the services required by this project.

   c. Consultants. List any specialists and consultants that will be utilized on this project as a sub-contractor to the firm.

   d. Project Experience. Provide a list and description of similar project experience that demonstrates the firm’s current qualifications for this project. Include as a minimum:

      (1) Name of Project

      (2) Owner representative, address and telephone number

      (3) General scope and dollar value of the project

      (4) Period of performance

      (5) Principle-in-charge of the project

      (6) Members of proposed project team who have worked on the listed projects

      (7) Current project status.

   e. Current Client List. Provide a list of current clients including the name of the Principle-in-charge and their address and telephone numbers.

   f. Other pertinent information or additional Information. Provide any additional information deemed necessary by the firm to describe any characteristics or qualities of your organization that will assist the UMA in evaluating a specific bid.

   g. Project Approach/Work Plan. Provide a detailed description of the management plan that will be used to accomplish the project work. Describe the methodology and processes proposed to develop and manage the RFP process in a manner that demonstrates the comprehensiveness of the plan. Identify specific services to be performed and submit samples of previous work that is pertinent to this project.

   h. Compensation and Fees. Provide a bid for the work outlined in Section II. The fees must represent all costs associated with the project. This request for proposal does not create any contractual relationship between the UMA and any party. The UMA
reserves the right to accept or reject any and all proposals, wholly or in part, submitted for this project.

B. Proposal:

1. Respondents to this RFP are asked to provide a bid as follows:
   a. Services Required

2. The proposal for above tasks shall include all costs associated with preparing for and attending meetings with UMA, its other consultants and advisors.

C. Evaluation Criteria

Listed below are the criteria that will be used to evaluate the bid submissions. They are ranked in order of preference starting with the most preferred. In addition, each evaluation criteria has been given a weighting factor. The weighting factor has already been established and will be used by the review committee. The criteria weights will not be made public until after the bid is awarded.

1. Qualifications and technical experience of key personnel and consultants assigned to this project and listed in the respondents bid.

2. Previous experience successfully providing analysis of operations similar in nature.

3. Proposed work plan and schedule outlining how the respondent intends to work with the UMA project team and facilitate the project.

4. Quality of bid in terms of the firm’s proposed methodology, clarity and comprehensiveness.

5. Interviews with selected respondents as well as interviews with customers of the respondents.

D. Submittal Deadline

1. Proposal shall be submitted no later than 2:00 p.m. on February 15, 2017
   Via BidExpress as stated in Section V.A.1 – page 5

E. Questions

1. Written questions may be submitted via e-mail before 5:00p.m. on Tuesday, February 7, 2017 to: procurement@admin.umass.edu

The answers to all questions will be posted via addendum on the University of Massachusetts Amherst Bid Information site at the following URL:

http://www.umass.edu/procurement/bidsopen.htm

All addendums will be posted no later than Friday, February 10, 2017
F. Contract

1. The successful bidder will be required to enter into a standard Contract for Services with the UMA. (A sample copy of the standard UMA contract is attached for informational purposes as Appendix A).

VI Appendices

A. Contract For Services (see site listed below to view)

http://www.umass.edu/procurement/Fill-In_Forms/CFS%20long%20form.pdf