Request for Proposals

for Project Management Services

for the development of the

Trinity Academic Center

May 6, 2013

Reply to:

Trinity Washington University
Mr. Michael Malewicki
Vice President for Administration
125 Michigan Avenue, NE
Washington, D.C. 20017

Schedule

RFP Issued:	May 6
Information Meeting:	May 15
Proposals Due:	May 24
Interviews:	Week of June 3
Selection:	June 10

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Request for Proposals
For Project Management Services
For Development of the Trinity Academic Center

Trinity Washington University (Trinity) invites proposals for Project Management services for the development of the new Trinity Academic Center. Trinity seeks a partner to serve as Trinity's owner's representative for the design and construction of the Academic Center. The Project Manager (PM) will work in cooperation with Trinity's president and board, chief financial officer and vice president for administration, as well as such other members of the Trinity staff as may be involved in the project, to ascertain Trinity's goals and objectives and to ensure that all project professionals and contractors act in Trinity's best interests. Acceptance of the responsibility to act as the owner's representatives includes recognition of the financial responsibility associated with such representation.

Detailed requirements of this RFP are further defined in Section C. Scope of Services, below. Planning documents relevant to this RFP are on Trinity's website at http://www.trinitydc.edu/president/trinity-academic-center-information-for-project-planners/

Trinity has also issued an RFP for design and construction, and a sample of that RFP is on the website. Trinity has invited proposals for independent architects as well as design/build teams. Bidders should be familiar with the terms of that RFP and take those terms into account when formulating a response to this RFP.

A. Project Description

See the complete project description in Section A. Project Description in the attached Request for Proposals for Architectural Services or Design/Build Services.

Summary: The Trinity Academic Center will provide approximately 75-80,000 square feet of new science laboratories, health professions laboratories, classrooms of varying sizes, faculty offices, student lounges and common spaces that are "state of the art" for collegiate academic purposes, at a total construction cost not to exceed $35 million.

B. Statement of Need

See the complete statement of need in Section B. Statement of Need in the attached Request for Proposals

Summary: Trinity is a 115 year-old comprehensive university that grew from a small women's college. Enrolling more than 2,600 women and men today in undergraduate and graduate programs, with a goal to grow to 3,500 by 2020, Trinity has outgrown its existing academic facilities, all of which are more than 50 years old. New programs in Nursing and Health Professions, as well as in the sciences, behavioral and social sciences, require new and different kinds of laboratories and classrooms. Students expect contemporary, functional and accessible facilities that support state-of-the-art instructional technologies.

C. Scope of Services

Proposals submitted in response to this RFP should address this Scope of Services in detail:

1. Planning Phase

    a. Review the project with Trinity to understand the project goals, requirements and restrictions.

    b. Work with Trinity and the design team to refine the conceptual program for services to be provided in the new facility.

    c. Prepare conceptual budgets and schedules as required to define the project parameters.

    d. Participate with Trinity in the assessment of bids and selection of the design team;

    e. Identify any perceived constraints to the design/construction process.

    f. Identify areas of risk and recommend actions which minimize or mitigate them, and provide Trinity with alternatives for decisions at critical project junctions.

    g. Meet with Trinity to help define individual roles & responsibilities, project procedures, notification requirements and to establish lines of communication and methods of approval.

    h. Assist Trinity in the negotiations and finalization of the consultant's contracts.

2. Design Phase

    a. Work with the design team to finalize the project scope, budget and schedule.

    b. Prepare a preliminary budget and schedule for site development, C&S and interiors.

    c. Coordinate and monitor the efforts of the design team in programming and preparation of the schematic drawings. Coordinate any value engineering and option generation exercises.

    d. Assist Trinity in obtaining information as required by the design team. Work with and coordinate the efforts of the design team to identify existing

conditions. This will require both non-destructive and destructive testing & inspections. Coordinate such testing/inspections with Trinity.

e. Prepare detailed schematic budgets for the site development, C&S and interiors of the new facility.

f. Finalize a detailed project budget incorporating the drawings, drawing revisions, project schedule, logistics and phasing requirements.

g. Coordinate and monitor the efforts of the design team in the design development and construction documents phases of the project.

h. Coordinate and encourage any value engineering and option generation exercises.

i. Prepare detailed budgets for site development, C&S and interiors at 50% design development, 100% design development and at 50% construction documents.

j. Develop cost monitoring and reporting system and review and track all design related costs.

k. Coordinate with the design team on revisions to the drawings as selected by Trinity and completion of the construction documents.

l. Review the documents for constructability, value engineering opportunities, budget compliance and logistics compliance. Update the budget as necessary.

m. Participate in regularly scheduled design & project meetings.

n. Identify any potential long lead items and participate in a pre-purchase program as required.

o. Meet regularly with the Trinity in-house coordination team for schedule and logistics planning.

p. As the work will be occurring on an occupied site for Trinity, establish a Project Rules & Regulations to be enforced during the course of the project.

q. Ensure that commissioning requirements are incorporated into the construction documents.

3. Filing Phase

    a. Monitor the collection of all required documentation as required in the filing process.

    b. Work with Trinity and the design team to establish a phasing plan which in turn will drive how the project will be filed.

    c. Monitor the filing phase.

    d. Work with the design team, construction manager, testing agency and Trinity on documentation as required to closeout each phase.

4. Construction & Commissioning Phase

    a. Conduct pre-construction meetings with Trinity staff, construction manager, and architect.

    b. Facilitate the construction coordination meetings on a weekly basis.

    c. Perform regular job observations to evaluate general compliance with quality requirements, construction progress, adherence to Project plans and specifications and assist in resolving field problems and disputes in the most economical and expeditious manner possible.

    d. Review the current status of the design and construction schedule and compare it to the proposed Project schedule identifying areas requiring special attention and potential remedial measures.

    e. Coordinate the preparation of a written monthly report of progress and status of project including contractor invoice summary, change order summary, and saving/contingency summary.

    f. Review all change orders for accuracy and fairness prior to Trinity approval. Oversee resolution of major construction claims and change orders during the construction period and prior to Project close out.

    g. Assist Trinity in coordinating the purchase & the installation of furniture, Fixtures, and equipment. Cost of FF&E installation by Trinity.

    h. Assist Trinity in coordinating the schedule of the installation of phone/data cabling and equipment. Cost of phone/data cabling and equipment by Trinity.

    i. Review requests for payment from contractor.

j. Maintain a detailed cost tracking system tracking all project expenditures, direct costs, soft costs & general construction costs.

k. Assist architect in determining date of substantial completion and coordinate the development of a "punch list" of items, which require completion and/or correction.

l. Monitor the procurement of proper close out documents from Construction Manager including warranties, final release of liens, as built plans, operation, and maintenance manuals.

m. Assist the construction manager in the commissioning of the MEP systems. Note the commissioning work will be performed in phases as the project progresses.

5. Project Closeout Phase

a. Finalize all open change orders and invoices;

b. Finalize the cost tracking report;

c. Coordinate the collection of all closeout documentation as called for in the construction documents per phase;

d. Monitor completion of all punchlists per phase;

D. RFP Timeline

RFP Issued:	May 6
Information Meeting:	May 15
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Selection:	June 10

Trinity reserves the right to change the schedule and will notify accordingly, and reserves the right not to consider proposals received after the specified date.

E. Site Visit

Trinity will provide an opportunity for interested bidders to visit the campus review the site and discuss the parameters of the project on Wednesday, May 15.

F. Proposal Format

Proposals should address the items detailed in the Scope of Services section. It will be the respondent's responsibility to indicate how each of these tasks will be undertaken and the specific elements that will be addressed to accomplish those tasks, based on the fee proposal submitted by the respondent.

Trinity recommends this outline for the proposals:

1. **Executive Summary:** a brief overall description of the company, the project team, and the approach to the Trinity project.

2. **Approach to the Project:** a description of the overall approach to understanding Trinity's project, executing the tasks listed in the scope of services with a specific section addressing the items in the scope and how the firm will accomplish them, and any samples of documents the firm has used to illustrate its methodology. Include as well a statement that indicates understanding of the local conditions for this kind of a project in the District of Columbia.

3. **Qualifications of the Firm:** in this section please include a complete description of the firm's qualifications, the team members and their qualifications, sub-consultants employed by the principals, the relationships among the team members, and work done for clients similar to Trinity and projects similar to the Trinity Academic Center. Include a description of current major projects of the firm and how this workload relates to the ability of the firm and its principals to provide top-level professional services to Trinity. Also address the experience of the firm in project management for projects in the District of Columbia.

4. **Timetable:** A timeline with milestones and key deliverables

5. **Fees:** A fixed fee proposal, per instructions in Appendix A.

6. **Due Diligence:** Trinity also requests:

    a. a statement of the firm's financial condition including liabilities, with the name of the certifier or auditor clearly indicated, and an indication of applicable insurance coverages;

    b. A statement of whether the respondent or any of its principals are the subject of any bankruptcy or insolvency proceedings, legal actions or investigations, and a statement of any indictments or convictions of the respondent or its principals;

    c. Identification of any potential conflicts of interest among the firms involved in this project, or in the firms' potential relationship to Trinity;

d. Identification of any other issues that could affect the firm's or team's ability to execute this project successfully;

e. List all jurisdictions in which the firms involved are registered and licensed;

7. **References:** Provide a list of current similar clients and indicate at least three individuals, with names and contact information, whom Trinity may contact in the referencing process.

G. Selection Criteria

Trinity will review and evaluate proposals based on the following criteria:

- Qualifications of the firm and the personnel to be assigned to this project;
- Demonstration of overall project understanding and insights into local conditions and potential issues;
- Depth of experience in managing higher education projects specifically with the new construction of campus academic/science facilities of high quality with strong client satisfaction;
- Quality and effectiveness of communications with Trinity and among members of the project team, and demonstrated compatibility among the team professional groups;
- Experience providing effective project management services past projects;
- Ability to complete projects within budget and according to schedule;
- Competitive pricing;
- Proven track record of controlling costs on similar projects;
- Ability to comply with all regulatory and insurance requirements, and fulfillment of all due diligence inquiries to Trinity's satisfaction;
- Quality and clarity of the proposal and creativity/thoroughness in addressing the scope of work; and
- Submission of a complete proposal with all elements required by the RFP.

H. Contract

Trinity will provide a sample of the standard contract to finalists prior to the presentation phase of this process.

I. Submission Process

Firms interested in this project should submit 5 copies of their proposal in hard copy to:

Trinity Washington University
Mr. Michael Malewicki
Vice President for Administration
125 Michigan Avenue, NE
Washington, D.C. 20017

Additionally, Trinity requests that the proposals also be sent electronically to:

Barbara Lettiere, CFO lettiereb@trinitydc.edu

Patricia McGuire, President president@trinitydc.edu

Michael Malewicki, VP malewickim@trinitydc.edu

Questions about the project should be emailed to Michael Malewicki. No calls please.

All proposals must be received no later than May 24, 2013. Proposals and/or modifications received after this time will not be accepted or reviewed. No facsimile-produced proposals will be accepted.

All proposals upon submission become the property of Trinity. The expense of preparing and submitting a proposal is the sole responsibility of the consultant.

Trinity reserves the right to reject any or all proposals received, to negotiate with any qualified source, or to cancel in part or in its entirety this RFP as in the best interest of the Trinity (which shall be determined in its sole discretion).

This solicitation in no way obligates Trinity to award a contract.

Appendix A: Guidance for Fee Proposal Submissions

Trinity seeks a fixed fee for Project Management Services. Proposals should provide the total cost to deliver the Project Management Services based on the specific scope of services and the proposed schedule. Include a proposed payment schedule.

The proposal should include all direct and indirect costs. Trinity will not separately reimburse items such as:

- Salaries/wages of management personnel, administrative support, and other staff including payroll taxes and fringe benefits (bonuses, health insurance, paid holidays and vacation, sick leave, social security contributions, pension contributions, etc.)
- Corporate or home office allocations.
- Accounting/data processing charges and any related supplies.
- Computer software.
- Monitoring of all contracts.
- Copy machines, and other office equipment rental charges and supplies that are not provided by TRINITY.
- Telephone, page and answering service expenses.
- Cost of stationary, business cards, forms, ribbons, pencils, pens, staplers, and other office and printing supplies.
- Cost of personal communication equipment, not provided by Trinity.
- Cost of metered postage and stamps.

Trinity will reimburse reasonable out-of-pocket travel expenses according to rules specified in the contract. Other special expenses that may arise beyond the expenses anticipated in the fee proposal may be reimbursed upon specific agreement between the PM and Trinity.