

Request for Qualifications

On-Call Cost Estimating and Scheduling Services

Submittal Deadline: March 19, 2020 at 3:00 p.m.

University of Washington Facilities (UWF) is soliciting Statements of Qualifications (SOQ) from construction estimating professionals to provide on-call professional services in preparing construction costs and scheduling services. Services are likely to be needed during the design/feasibility phases of a new construction and/or renovation projects, managed by UWF at various University of Washington locations including Seattle, Tacoma and Bothell campuses, and Harborview Medical.

For the purposes of this selection and Agreement, UWF is represented by the Project Delivery Group (PDG); however, other units inside UWF that may use services under this Agreement include, but are not limited to, Capital Planning and Portfolio Management, Engineering Services, Campus Utilities and Operations, as well as Maintenance & Construction. Throughout this request, UWF will mean all groups inside UWF unless PDG is specifically mentioned.

Master Agreements: The University intends to select two, or more, firms under an on-call Master Agreement. Selected firms may work on one or multiple concurrent projects of varying size and complexity. 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 may include, but are not limited to, the following:

- Conceptual construction estimates and/or schedules for use in budget development and funding needs;
- Construction and/or schedules estimates at different phases during the design and construction of projects;
- Research (using the firm's previous work and/or external verifiable sources) regarding the scopes, costs, and schedules of other construction projects similar to those being analyzed for the University;
- Estimating and/or analysis of specific disciplines individually, major scopes, and/or trade/labor levels and productivity estimates separately or included in standard estimates;
- Life-cycle cost analysis

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 (20 sides), 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 page limit.

- 1) **Cover Letter:** A cover letter explaining your firm's interest, addressing, at a minimum, the following:
 - A. A high level summary of your firm's relevant qualifications, including a summary of relevant expertise, experience, and practice.
 - B. Acknowledge that you have reviewed any addenda issued to the RFQ, as posted on the University's website.
 - C. Concisely outline the size and organization of your firm and discuss your capability to successfully manage and complete one or more projects of the indicated size, on an on-call basis.
 - D. 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 (Mr., Ms., etc.), firm name, address (city, state, zip code), telephone number, and e-mail address.

2) Relevant Experience of the Firm:

Please provide examples of estimates you prepared in the last 3-years, which include the following:

- A. Construction Project(s) estimates with the final cost within +/- 10% of the initial estimate. For each project provide the name, description, and size of the project, the name lead estimator, the methodology(ies) used to prepare, initial estimate and final cost. Discuss the success factors and lessons learned with each.
- B. Project(s) where your team prepared construction costs estimate and schedules for projects in hospital or medical facility, sporting or athletic facility, infrastructure projects, classrooms or academic, including audio-video and laboratories. Demonstration projects can include multiple of each project types. For each project provide the name, description and size; as well as the lead estimator and methodology(ies) used. Also provide the initial estimate and final cost of each.
- C. Provide a sample of a life cycle costs analysis.

3) Staff Experience and Availability:

- A. Provide a typical staffing plan that includes the necessary staff/team make-up to efficiently address each of the needs in the Scope of Services. Provide an organizational chart with roles and responsibilities, that shows staffing and experience resources that might be available for this work if needed. Discuss how work assignments and availability might be managed.
- B. For each of the available estimators provide a resume that highlights experience in construction cost estimating. Please include a paragraph that speaks to their overall capabilities and subject areas of expertise as applicable. Be sure to include each of their professional certifications such as Certified Estimating Professional, for ASPE, ICEAA, or AACE, or similar. (Resumes and certifications can be placed in an appendix.)

4) Approach and Methodology:

- A. Describe your firm's approach to, and the methods and techniques used, in construction and schedule estimating. Be sure to provide discussion on the 4 most common practices. Feel free to

introduce others that you have found effective. Discuss the most effective by project or phase types. Most common methods are:

- i. Project Comparison Estimating
- ii. Square/cubic foot Estimates
- iii. Assembly and Systems Estimates
- iv. Unit price and Schedule Estimating

5) Business Equity Enterprises (BEE):

- A. The University is committed to providing the most practicable opportunity for Business Equity Enterprises (BEE). Discuss three past projects of similar service scopes where your firm has provided opportunity for BEEs to be included. For each demonstration project please include the name, description, the size, and the specific opportunity that was afforded. Discuss the scope of work performed by the diverse business partner and any lessons learned.
- B. For this Agreement, discuss potential opportunity for BEE inclusion. Be sure to include thoughts around size, scope, and similar factors that would present the highest practicable opportunity for BEE firms in this work.

If your firm is a BEE please indicate. Even if your firm is a BEE, UWF is still interested in any opportunities to partner and sub-consult with BEE firms so please discuss any opportunities available.

See the Business Equity section near the end of this RFQ for the definitions of BEE.

- 6) References: Provide a minimum of three (3) project owner references for work completed by your firm. References should be selected from projects submitted 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.

Acceptance of University's Standard Agreements: The University intends to utilize its standard Master Agreement for Professional Services for the work. The Agreement is available for review on the UW Facilities website at: <https://facilities.uw.edu/projects/business-opportunities/contracts-forms>. Select the 'Master Agreement for Professional Services – Miscellaneous OA4'. Each firm must affirm in this

section of the SOQ that the terms and conditions of this agreement are 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. Firms’ responses to this section will facilitate negotiations with the most highly qualified firm(s) and will not be considered in the evaluation process. The University makes no commitment that it will modify any of the terms of these standard agreement based on the firm’s exceptions. Firms should not comment on the terms of Attachment A to the Agreement that include compensation provisions.

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	No Points
2	Relevant Experience of the Firm	30
3	Staff Experience and Availability	30
4	Approach to the Work	30
5	Inclusion of BEE	10
6	References	No points
	Total Points:	100

Submittal Deadline: One (1) unbound original, and One (1) USB thumb/flash drive(s) 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). 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: Beck Eatch
Phone: 206-221-4232
Email: beatch@uw.edu
University Facilities Building
Box 352205
Seattle, WA 98195-2205

Any addenda issued for this RFQ will be published at the following website address:

<https://facilities.uw.edu/projects/business-opportunities/solicitations>. 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.

Protect Procedure:

In order to be considered, protests of the selection decisions made pursuant to the Selection Process must be received by the Owner no later than four (4) business days from the date of email notification to the proposers/Finalists, as appropriate, of the selection decision as set forth in RCW 39.10.330(3) and (6). Protests must be in writing, and addressed to:

University of Washington
Executive Director, Project Delivery Group
Attention: Steve Tatge
Phone: 206-221-4231
Email: statge@uw.edu
University Facilities Building
Box 352205
Seattle, WA 98195-2205

Selection Process: The SOQs will be reviewed by an evaluation committee and the highest ranked firms will be invited to enter into negotiations with the UW. As an option, the UW may decide to invite the highest ranked firms to an interview in order to appropriately size a roster of firms. Interviewed firms will be asked to prepare a presentation summarizing their statement of qualifications, capabilities and relevant work experience, including why they believe they are the best option for the UW.

The most highly qualified firm(s), based on the total points from the evaluation of the SOQs and any potential 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.

The University reserves the right to conduct reference checks for the highest scoring firm(s) 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 the firm's past performance or their ability to successfully perform the work of the agreement(s) 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 to 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 SOQs submitted.

Anticipated Consultant Selection Schedule

Issue Request for Qualifications	February 28, 2020
Statements of Qualifications due at 3:00 p.m.	March 19, 2020
Selection and notification of firms to possibly be interviewed	April 3, 2020
Possible Interviews of selected firms	Week of April 13, 2020
Announcement of highest-scoring firm	April 20, 2020
Execute Master Term Agreement	May 1, 2020

Business Equity Enterprises

The University's Business Diversity and Equity Program recognizes all forms of certified and self-identified diverse firms. 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:

1. **Certified Business Enterprise (CBE):** Any business enterprise certified with the Washington State Office of Minority and Women's Business Enterprises, Great Seattle Business Association, Northwest Minority Supplier Development Council, or the Women's Business Enterprise Council.
2. **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.
3. **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
4. **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.
5. **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
6. **Veteran's Business Enterprise (VBE):** Certified with the Washington State Department of Veteran's

Affairs (DVA), or a certified Disabled Veteran Business Enterprise.

7. **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 Beck Eatch, Assistant Director, Project Delivery Group, at (206) 221-4232, or by e-mail at beatch@uw.edu.

Publication date(s) in the *Seattle Daily Journal of Commerce*: February 28, 2020