



Request for Proposals (RFP)

No. RFP UB-24-JE-1

FOR

Facilities Master Plan and Facility Program Plan Services

ISSUE DATE: JULY 19, 2023

ISSUING OFFICE:

UNIVERSITY OF BALTIMORE
Office of Procurement
1420 N. Charles Street, Baltimore, MD 21201

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and

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The Issuing Office is the sole point of contact for this task order procurement.

NOTICE: Prospective Proposers who have received this document from a source other than the Issuing Office are advised to contact the Issuing Office. This is a courtesy, the University does not take responsibility if any Prospective Proposer is not informed of communication issued under this RFP. It is the sole responsibility of any Prospective Proposer to visit the University's website for all documents relating to this RFP. Visit: <http://www.ubalt.edu/about-ub/offices-and-services/procurement/information-for-merchants/current-ub-solicitations.cfm>

UNIVERSITY OF BALTIMORE

No. RFP UB-24-JE-1

FOR

**Facilities Master Plan (FMP)
and
Academic Center (AC) Facility Program Plan (FPP) Services**

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SOLICITATION SCHEDULE

Issued Date:	July 19, 2023
In-Person Pre-Proposal Conference:	July 26, 2023 at 10:30 AM EDT
Last Day for Questions:	July 31, 2023 at 10:00 AM EDT
Responses to Questions by:	August 2, 2023 (to vendors)
Technical Proposal Due Date:	August 9, 2023 at 10:00 AM EDT
Virtual Oral Presentation/Discussion Session(s): For invited shortlisted firms only	August 21-22, 2023 (Invite Firms Only)
Financial and Price Proposal Due Date:	August 30, 2023 at 10:00 AM EDT (Invite Firms Only)
Contractor(s) Selection Anticipated to be finalized:	By September 7, 2023
Contract Commencement:	September 15, 2023 (Projected)

Note: Proposals are to be provided by the due date noted above. Proposals are to be submitted electronically to Issuing Office Contact/s noted in this RFP.

SECTION I.

GENERAL INFORMATION

1.1 OBJECTIVE.

The University of Baltimore (UBalt) is soliciting proposals from qualified professional firms who specialize in providing both **Campus-wide Facilities Master Plans (FMP) and Facility Program Plans (FPP)** of superior quality, at competitive pricing, as described in the Statement of Work section of this RFP. The FMP and the FPP must be prepared in accordance with the requirements of the State of Maryland and the University System of Maryland. The awarded firm shall provide both an FMP for UBalt and an FPP – Part I and Part II – for the Academic Center at UBalt. These services will be awarded and managed under two contracts. **By awarding one firm both the FMP and the AC FPP, UBalt anticipates the awarded firm will apply and build on the knowledge gained in the FMP to efficiently develop the AC FPP.**

Facilities Master Plan

The FMP establishes a framework for the orderly development and implementation of capital improvements on campus. It should be responsive to UBalt's current and projected needs and sufficiently flexible to accommodate changes. The FMP will describe the optimal, desired development of available campus land and buildings, consistent with UBalt's mission statement, future enrollment goals and profile, and the University's directional documents. The FMP should consider the current and future needs, opportunities, and goals of UBalt and address those issues that will benefit the campus and its surroundings in mid-town Baltimore. A serious environmental commitment to the concept of reducing greenhouse gas emissions and combating climate change in development and operations should be an ongoing theme. **The FMP must commence during or before September 2023 and be completed by May 2024, with final materials prepared during the summer of 2024 for presentation to the University System of Maryland.**

Facility Program Plan for the UBalt Academic Center

The FPP is for the UBalt Academic Center (AC) building located at 1420 N Charles St, Baltimore, MD 21201. The AC FPP will set forth the Program to support a Capital Improvement Project (CIP) for the Academic Center and will consist of Part I and Part II as set forth by the State of Maryland Department of Budget and Management. The Part I document will present the justification for the AC Project and will include an overview of the proposed elements for the new Academic Center. Part II, which will follow in development, will present the specifications for the proposed Academic Center facility, as well as the guidelines, standards, **and cost estimates** for design and construction. UBalt anticipates that the existing Academic Center may require a full or partial demolition along with new construction and renovation of any retained building elements and spaces. **The AC FPP Part I must be completed on or before December 12, 2024. The AC FPP Part II must be completed on or before February 28, 2025.**

Proposals are to fully address the requirements for the UBalt FMP and the requirements for the Academic Center FPP as two distinct components of this RFP. Costs, timelines, credentials, and all other relevant information are to be provided in two separate sections, with one section specific to the FMP and the other section specific to the AC FPP.

The work to be performed under this proposal shall be provided by fully trained and experienced professionals with appropriate license(s) and shall consist of all necessary supervision, insurance, testing, labor, equipment and materials to perform a complete and acceptable job to the satisfaction of the University of Baltimore's representative. The University reserves the right to purchase items and services not specifically listed in this RFP.

1.2 OVERVIEW OF THE UNIVERSITY OF BALTIMORE.

Founded in 1925, The University of Baltimore is one of 12 institutions that comprise the University System of Maryland, the nation's 12th largest university system. The University of Baltimore offers career-focused graduate, doctoral and undergraduate programs and certificates in law, business, public affairs and the applied arts and sciences. Designed for working adults, UBalt academic programs are offered in flexible formats, including day, evening, weekend, in person, online and hybrid options. UBalt offers excellent teaching and a supportive community for graduate, professional and undergraduate students in an environment distinguished by outstanding student outcomes, academic research and public service, particularly in the Baltimore region. The University is organized into four schools/colleges, including the School of Law, the Merrick School of Business, the Yale Gordon College of Arts and Sciences, and the College of Public Affairs.

Our campus comprises 11 acres in the heart of midtown Baltimore near Penn Station. UBalt's campus includes eight main buildings plus structured parking totaling approximately 1 million square feet. In addition, UBalt owns ancillary buildings near campus and several small parking lots. UBalt is a non-residential campus as most of our students are older, working adults.

The University entered into a ground lease that resulted in a mixed-use real estate development on our campus edge, with a second mixed-use development currently being negotiated.

As the University prepares for its centennial in 2025, we strive to build upon our legacy and leverage our strengths to forge a bold future. UBalt's strategic goals, as described in UBalt's strategic plan are:

1. Position UBalt as the region's premier professional, career-focused university
2. Strengthen student success
3. Solidify UBalt's commitment to community engagement and service
4. Organize for long-term financial stability
5. Achieve excellence in research, scholarship and creative activity
6. Strengthen UBalt's commitment to diversity, equity and inclusion

In fall 2022, UBalt enrolled 3,288 students, including 1,919 graduate students (which includes our law school students), and 1,605 undergraduate students.

By design, UBalt serves a nontraditional population:

- The majority of UBalt students are enrolled in graduate programs.

- Nearly all our undergraduate students enroll at UBalt after completing credits elsewhere including those who have completed community college programs.
- The average age of our undergraduate students is 27.
- Our overall student population is 57 percent minority.
- Our student population is evenly divided between full-time and part-time students.
- The majority of our undergraduate students are first generation students and/or high financial need students as determined by the U.S. Department of Education.
- UBalt has been designated by the U.S. Department of Education as a Predominantly Black Institution (PBI), the only four-year university in Maryland with this designation and one of approximately 67 nationwide.
- Our campus is oriented toward the needs of our non-traditional, career-oriented students, and therefore, does not provide residence halls, meal plans, intercollegiate athletics, or fraternities or sororities.
- UBalt delivers instruction and services in a flexible environment with in-person, virtual/online, and hybrid modalities to suit our older, non-traditional student populations. The University has a long tradition with the combination of in-person and online instruction; we were the first in the country to offer a fully online MBA program accredited by AACSB International.
- UBalt students are highly successful, as demonstrated by UBalt's ranking in the top 5 percent of master's universities in the nation for earning performance 10 years after entering college, according to Washington Monthly.

With nearly a century of success as the career-minded, city-focused institution for Baltimore and the region, the University is determined to build on its success. UBalt is well positioned for the changes underway in higher education. And we are committed to our continuing role as an anchor institution in Baltimore, contributing in meaningful ways to the surrounding community. UBalt is not only the University of Baltimore, but also the University for Baltimore.

For more information about UBalt, visit <http://www.ubalt.edu>

1.3 ISSUING OFFICE.

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The Issuing Office shall be the sole point of contact with the University for purposes of the preparation and submittal of proposals in response to this solicitation.

1.4 MINIMUM QUALIFICATIONS.

Firms must demonstrate the following qualifications, at a minimum, to be deemed eligible for award. Firms that do not include the required information that demonstrate the minimum qualifications shall not be considered for award. The University reserves the right to waive this requirement.

- The contractor shall have a minimum of ten years successful experience in FMP services as described in the RFP.
- The contractor shall have actively engaged in and satisfactorily performed FMP services for a University or College within the last ten years.
- The contractor shall have a minimum of ten years of successful experience in FPP services as described in the RFP – both Part I and Part II.
- The contractor shall be familiar with specific requirements of the State of Maryland and University System of Maryland for FMP's and FPP's.

1.5 QUESTIONS AND INQUIRIES.

All questions and inquiries regarding this procurement must be directed to the individual(s) referenced with the Issuing Office above. Questions must be submitted in writing via the link provided below. Inquiries will receive a written reply/confirmation, submitted inquiries that are not confirmed by the University may not have been received. It is the sole responsibility of potential proposers to ensure inquiries/questions are received. Only written communications relative to the procurement shall be considered.

All questions will be answered in writing, in the form of an addendum to the RFP. Both questions and answers will be distributed, without identification of the inquirer(s), to all prospective contractors who are on record with the Procurement Officer as having received this RFP. No oral communications from the project team can be relied upon for proposal purposes.

Should a Proposer find discrepancies in the specifications or contract provisions included in this solicitation, or should there be doubt as to the meaning or intent of any section or subsection herein, the Proposer should request clarification from the Procurement Officer. Failure to request a clarification prior to the due date will be a waiver of any claim by the Proposer for expenses made necessary by reason of later interpretation of the contract documents; Proposers will be bound to the University's interpretation.

Potential proposers are advised that the University reserves the right to use its best judgment in choosing to respond or not to respond to any questions received before or after the above stated cut-off date for questions.

All such questions and inquiries must be received by the date provided in the RFP or as updated via Addendum.

All Questions must be sent via a Word attachment to the following link: [RFP Questions](#)

1.6 RFP REVISIONS OR AMENDMENTS TO THIS RFP.

The University reserves the right to amend this solicitation at any time prior to the proposal due date. If it does become necessary to amend any part of this solicitation, the Procurement Officer will furnish an amendment or addendum to all prospective Proposers listed by the University as having received a copy of the RFP. All amendments/addenda will be identified as such. If necessary, the proposal due date may be extended. Proposers are required to acknowledge the receipt of all amendments, addenda, and clarifications issued. (Reference Appendix A, provided under a separate cover)

1.7 PRE-PROPOSAL CONFERENCE.

There will be a Pre-Proposal Conference held in conjunction with the RFP. Attendance at the Pre-Proposal Conference is not mandatory.

The conference will be held at H. Mebane Turner Learning Commons, Town Hall room 100 at 1415 Maryland Avenue (use Gordon Plaza entrance) on July 26, 2023 at 10:30 AM EDT and will be followed by a 30-minute tour of the Academic Center Building.

Click here to view UBalt's [Campus Map](#).

The University will review the RFP document during the first hour of the Pre-Proposal Conference, should one hour not be required the tour shall immediately commence after the review of the RFP document. Attendees arriving after the tour commences may not be able to join the tour.

If your firm is interested in attending the Pre-Proposal and site visit please click on the link provided to register by July 24, 2023 4:00 PM EDT, [Pre-Proposal Conference Registration](#)

While attendance at the Pre-Proposal Conference and site visit is not mandatory, information presented may be highly informative; therefore, all interested proposers are encouraged to attend in order to be able to better prepare acceptable proposals. Copies of the RFP will not be shared. Attendees are advised to bring a copy. A list of the attendees will be shared via an Addendum.

Guests should park at the Fitzgerald Garage. GPS address is 80 W. Oliver St., Baltimore MD 21201. Handicapped parking is available in a concentrated area on the first floor and on each level near the elevators.

The Pre-Proposal Conference location is subject to change. Proposers are advised to visit the University's Procurement website daily for the most updated information.

SPECIAL ACCESS: Any attendees requiring special assistance in attending the Pre-Proposal Conference, should contact the Issuing Office within 5 business days prior to the Pre-Proposal Conference date.

1.8 PRE-PROPOSAL MODIFICATION OR WITHDRAWAL OF OFFER.

Proposals may be modified or withdrawn by written notice received at the Issuing Office before the proposal due date and time.

1.9 CLOSING DATE.

Proposals must be submitted no later than August 9, 2023 at 10:00 AM EDT. Proposals in digital format, as well as transactions, and communication, in specified format, are permitted for this procurement. Proposals must be sent to the issuing office by the date and time noted in this RFP or as amended via an addendum. Attachments must not be zipped or compressed. Proposals, amendments to proposals, or requests for withdrawal of proposals arriving after the closing time and date shall not be considered. The names of contractors will not be released until after award. At the University's sole discretion, the Solicitation Schedule may be modified.

1.10 NO PUBLIC OPENING OF PROPOSALS.

A public opening of technical and price proposals will not be held.

1.11 PUBLIC INFORMATION ACT NOTICE.

Contractors should give specific attention to the identification of those portions of their proposals that they deem to be confidential, proprietary information or trade secrets and provide any justification why such materials, upon request, should not be disclosed by the State under the Access to Public Records Act, State Government Article, Title 10, Subtitle 6, Annotated Code of Maryland.

Contractors must clearly identify each and every section that is deemed to be confidential, proprietary or a trade secret (it is NOT sufficient to preface your proposal with a statement that the entire content is proprietary, or to use a page header or footer that arbitrarily marks all pages as confidential). Any individual section of the proposal that is not labeled as confidential with an accompanying statement concerning the rationale for its claimed confidentiality shall be considered public information.

1.12 PROCUREMENT METHOD.

This solicitation shall be conducted in accordance with the provisions of the University System of Maryland's (USM) Procurement Policies and Procedures. Specifically, the procurement method employed shall be Competitive Sealed Proposals.

1.13 ECONOMY OF PREPARATION.

Each proposal should be prepared simply and economically, providing a straightforward, concise description of the contractor's offer and capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content.

1.14 CONTRACT TERM.

Facilities Master Plan

The contract for the FMP services shall commence immediately after award and contract execution, approximately mid-September, 2023. The contract shall terminate upon completion of services or as determined by the University at a later date.

Facility Program Plan – Part I and Part II

The contract for the FPP Part I and Part II shall commence on or around September 1, 2024. The contract shall terminate upon completion of services or as determined by the University at a later date.

1.15 PAYMENT SCHEDULE.

Payments will be made monthly in arrears, on a net 30-day basis, unless a payment schedule was accepted and agreed to under the proposal and executed contracts. The fee is to be inclusive of all costs.

1.16 CONTRACT ADMINISTRATION.

A system for contract administration shall be maintained to ensure contractor conformance with the terms, conditions and specification of the contract and to ensure adequate and timely follow up.

1.17 CONFIDENTIALITY STATEMENT FOR CONTRACTORS.

The successful Proposer will be required to sign the Confidentiality Statement for Contractors. See Appendix C (provided under a separate cover) for the contractual confidentiality obligations.

1.18 ACCEPTANCE OF TERMS AND CONDITIONS.

By submitting a Proposal, a Proposer shall be deemed to have accepted the terms, conditions, and requirements set forth in this RFP. The RFP including all addenda in total shall be incorporated into the Contract by reference. Any exceptions to the terms and conditions shall be submitted as specified in the Response Requirements section of this Solicitation. Contract exceptions not provided in the format required under this RFP shall not be accepted nor be made part of any Contract, if awarded.

1.19 MINORITY BUSINESS ENTERPRISES (MBE).

An MBE goal is not required under this RFP.

Minority participation is important to UBalt and the State of Maryland. State-certified Minority Business Enterprises (MBE) are strongly encouraged to respond to this solicitation notice. If not certified by the Maryland Department of Transportation (MDOT), MBEs are encouraged to initiate certification as soon as possible. For more information on the State's MBE program or questions related to certification, please contact MDOT's Office of Minority Business Enterprise/Equal Opportunity, telephone 800-544-6056 or view the MDOT website <http://www.mdot.state.md.us/mbe/index.html>.

1.20 The Technical Proposal and/or Price Proposal, either individually or collectively, is considered by UBalt to be an Offer.

1.21 ALTERNATE SOLUTION PROPOSALS.

A proposer may not submit an alternate solution to the approach depicted in the RFP.

1.22 MULTIPLE PROPOSALS.

A proposer may only submit one proposal.

END OF SECTION I

SECTION II.

STATEMENT OF WORK

This Statement of Work below provides information for two distinct services for which separate contracts will be issued:

- UBalt Facilities Master Plan, and
- Academic Center Facility Program Plan Part I and Part II

The work for the Academic Center Facility Program Plan will be informed by the UBalt Facility Master Plan.

Statement of Work for The UBalt Facilities Master Plan (FMP)

2.1. Facilities Master Plan – Overview and Scope of Work

The University of Baltimore is soliciting professional planning and consulting services for the comprehensive development of a campus-wide Facilities Master Plan (FMP). The FMP will provide clear direction on the physical improvement and right-sizing of the University’s facilities, based on anticipated enrollment growth and the development and modernization of the University, while also accommodating for unanticipated conditions. It is expected that this effort will inform the content of future Capital Improvement Plans and Project requests from UBalt to the State of Maryland for the upcoming decade. The FMP will not only study new space needs, but also needs for renovation, refurbishment, modernization, and replacement of existing space. Specific capital initiatives will be identified through this master planning process, drawing from the feedback of constituents and directly supporting UBalt’s mission, goals, and strategies.

Overall, the Facilities Master Plan will be developed to advance UBalt’s educational mission and vision, UBalt’s strategic plan, and the goals set forth in other key directional documents. The FMP will be forward-looking and geared to the success of UBalt’s distinctive student populations.

2.2. Background

UBalt’s current Facilities listing is provided as Exhibit 1.

2.3. Facilities Master Plan – Consultant Services

The selected consultant team will serve multiple roles for UBalt, including the preparer of deliverables, facilitator of discussions and meetings, planning specialist, data and benchmark analyst, project manager, and identifier of key decisions needs for the FMP. The consultant team will provide options and articulate the trade-offs.

The consultants will work directly with the UBalt FMP Task Force. With the consultants, the UBalt FMP Task Force is responsible for guiding the development of the FMP, working in collaboration with the campus community. The FMP Task Force is a recommending body to the UBalt president.

The consultants, with Task Force members as liaisons, will engage with the UBalt campus in a robust and productive manner through a series of communications opportunities that may include Town Halls, meetings within established organizational structures, special purpose work groups, surveys, and more, all for the purpose of developing an optimized and actionable Facilities Master Plan for UBalt. The consultants shall attend, and typically facilitate, meetings with University constituents to gain input for development of the requirements and options for the FMP. The consultants shall respond to comments made by UBalt representatives and foster mutual understanding and decisions. The consultants will collaborate with the Task Force regularly and proceed with regular engagement for feedback on options as work develops and decisions are made. Final decisions are the responsibility of the President with input from the consultants, the Task Force, and campus constituents. The FMP is subject to approval by the University System of Maryland Board of Regents.

The consultant will ensure the following:

- a. The FMP is to be comprehensive and include information about UBalt's mission, goals, strategies, and distinct student profile - and how these relate to facilities requirements. This involves an analysis of current and future space and program needs to implement the approved mission for UBalt's distinct student populations in a changing higher education environment; a description of existing land and facilities, including a description of the possible new or revised use of existing land and facilities; projection of needs over the next 10+ years; and clearly stated assumptions and criteria to meet identified needs. The forward view will likely require exceptional technology capabilities and attention to hybrid environments that foster excellence in core functions and commitment, connections, personal touch, and success.
- b. All options and recommendations brought forward from the master planning process will be informed by data and precedent where it is available as well as by professional expertise and judgment. The consultant shall work closely with UBalt to obtain data as needed. Options and recommendations by the consultant will include consideration of benefits and risks and will be realistic and actionable.
- c. The consultant will seek input and feedback from UBalt constituents in developing options and recommendations. The consultant will integrate the insights of UBalt constituents and resolve concerns held by stakeholders during the master planning process. The consultant must have and use experience in organizing and conducting engagement exercises, which may include SWOT analyses, charrettes, surveys, and various means of encouraging participation and productive discussion of different perspectives. The consultant shall familiarize themselves with UBalt and shall work with the UBalt Facilities Master Plan Task Force to determine the best means and methods to engage with campus constituents.
- d. The FMP must be capable of implementation. Priorities set forth in the FMP must include viable financial estimates and time frames.
- e. The FMP must be delivered in a modifiable format that can be updated by UBalt and/or others at periodic intervals. The final report is to be attractive, clearly written, illustrative, and exciting, so as to fully convey the vision, spirit, and future of UBalt as the University approaches its 100th anniversary in 2025.
- f. The Facilities Master Plan will be developed in accordance with and in furtherance of:

- The University System of Maryland (USM) Facilities Master Plan Guide
- The USM Guidelines for Submission of a Facilities Master Plan to the State of Maryland Department of Budget and Management
- Goals and objectives of Plan Maryland and the Maryland Green Building Program
- USM Vision 2030 and all applicable policies of the USM Board of Regents

2.4. Report and Deliverables

The format and components of the FMP will reflect UBalt's mission, goals and strategies, the condition and opportunities for our physical campus, our community setting, etc. UBalt's FMP should adhere to the following framework relative to topics covered, allowing for changes and additional elements as warranted:

1. Statement of UBalt's mission
2. Statement of UBalt's operating model for teaching, learning, services, and working. Key planning assumptions such as enrollment, student profile, modalities, and academic programs
3. Planning assumptions and guidelines for development based on
 - a. Existing directional documents at UBalt
 - b. Student profile goals and differentiation
 - c. Comprehensive program of stakeholder participation and the goals and objectives expressed by these stakeholders
 - d. Improvements in energy efficiency
4. Acknowledgement of the level and impact of deferred maintenance
5. Assessment and analysis of existing land and buildings relative to campus and relative to the surrounding neighborhoods
6. Assessment of space utilization
7. Assessment of energy use and operations, including an emissions inventory
8. Statement of UBalt's facilities needs and opportunities relative to UBalt's mission, goals, operating model, planning assumptions, and various assessments referenced in the FMP
9. Specific plans in major component areas:
 - a. Deferred maintenance remediation and facilities modernization in existing buildings
 - b. Campus right-sizing
 - c. Classroom space needs/opportunities and technology requirements based on instructional delivery methods and student enrollment profile; classroom utilization
 - d. Laboratory space needs/opportunities
 - e. Office needs for faculty and staff in hybrid work environment
 - f. New construction and renovation/replacement
 - g. Addressing sustainable or "green" buildings
 - h. Addressing pedestrian and vehicular traffic on campus and adjacent streets where applicable
10. Buildings and site
 - a. Site development, landscape, and urban design features
 - b. Clear demarcation, branding, and announcement of the UBalt physical campus through signage and other means
 - c. Utilities extensions and improvements
 - d. Transportation issues, including vehicles, pedestrians, trip reduction, public

- transport, energy, and parking
 - e. Environmental issues – greenhouse gas emissions reduction, water, wastewater, refuse and recycling; energy supply options
 - f. Facilities renewal, renovation and replacement: program-driven and code compliance efforts (ADA, building security, etc.)
 - g. Building use, occupancy and re-use
 - h. Land-use and “zoning” (including sustainable site issues)
 - i. Land and building acquisition and divestiture
 - j. Community impact and participation
11. An implementation strategy, including:
- a. A recommended set of prioritized individual capital projects and actions
 - b. Recommended sequencing of projects without specific time constraints
 - c. Emissions reduction measures and carbon offset options
 - d. A plan for continued community participation and implementation
 - e. A method and schedule for updating and improving the plan

2.5 Specific print and electronic deliverables for the FMP shall include:

- a. The Facilities Master Plan, including graphics, tables, and maps
- b. Executive Summary of the FMP, including graphics, tables, and maps

Print versions and electronic versions of the FMP and the Executive Summary

- Facilities Master Plan 75 printed copies
- FMP Executive Summaries 200 printed copies
- Master Digital files (Word, PDF, CAD, Excel, etc.)
- All graphic and map files (including CAD files) on USB

**Statement of Work
for
The Academic Center Facility Program Plan (AC FPP) – Part I and Part II**

1. Overview

The new Academic Center will be a transformational Project for the University of Baltimore campus. The Academic Center is the largest building on campus. It currently houses many key functions, including most of the College of Arts and Sciences, many of UBalt’s classrooms, several programmatic labs, numerous student-facing offices for enrollment services and student services, UBalt’s executive offices, and more.

The opportunity to replace the existing, poorly functioning facility with modern, forward-looking teaching, learning, and working spaces is exciting for the future of UBalt, our students, and Baltimore City.

In addition to its direct support of UBalt, the Academic Center location on the corners of N Charles St, Mount Royal Ave, and Oliver St across from Penn Station, and its visibility from the Jones Falls Expressway, provide prominence and impact to midtown Baltimore.

2. Project Scope

The Project Scope is for the selected consultants to prepare a Facility Program Plan, both Part I and Part II (see descriptions below) to replace, modernize, optimize, and right-size the existing UBalt Academic Center for the current and future needs and goals of UBalt and our students. The building is expected to be highly suited to UBalt and include advanced technology for hybrid teaching, learning, and working.

Detailed information about the requirements of the Program Plan Part I and Part II are furnished in the Manual on the State of Maryland Department of Budget and Management (DBM) web site:

<https://dbm.maryland.gov/budget/Documents/Capital%20Budget/Information%20for%20Agencies/facilityprogmanual.pdf>

- Part I of the Program document is to present the justification for this Academic Center Project and set forth its proposed elements.
 - The need for the Academic Center Project must be documented in Part I, in accordance with the State DBM manual and with a strong case related to the elements below, as relevant.
 - i. building condition
 - ii. programmatic obsolescence
 - iii. current and future anticipated space deficits
 - iv. prior funding, and
 - v. recognition in the institution’s Master Plan as approved by the University

System of Maryland Board of Regents

- The specific functions, programs and purposes to be housed in the Academic Center will be included in the Facilities Master Plan.
- Essential elements of the Part I Program will include holistic Space Programming, serving UBalt's non-traditional student populations well in a changing higher education environment, and incorporating environmentally responsible design.
- Part II of the Program document will present the specifications for the proposed Academic Center facility, as well as the guidelines and standards for design and construction. Part II must also include a cost estimate for the Project.

Overall, the Program and Project must be realistic for funding, implementation, and operation.

The consultants are to submit a price and fee proposal for the above Part I Program, a price and fee proposal for the Part II Program, and the resulting Total price for the Facility Program Plan for the Academic Center.

UBalt's goal is for Part I to be completed by December 12, 2024 and for Part II to be completed by February 28, 2025 if at all possible.

3. Services

The services to be provided by the consultant are those needed to develop the Part I and Part II Program documents, working collaboratively with designated UBalt representatives.

The consultants will work directly with a UBalt Task Force to be formed for the FPP for the AC. With the consultants, this FPP Task Force for the AC will be responsible for guiding the development of the FPP, working in collaboration with the campus community.

The consultants, with Task Force members as liaisons, will engage with the UBalt campus in a robust and productive manner through a series of communications opportunities that may include Town Halls, meetings within established organizational structures, surveys, and more, all for the purpose of developing an optimized and actionable Program for the new Academic Center. The consultants shall attend, and typically facilitate, meetings with University personnel representing UBalt constituents to develop and review the requirements and options for the Project, as informed by the Facilities Master Plan. Consultants shall respond to comments made by UBalt representatives. The consultants will collaborate with the Task Force regularly and proceed with regular engagement for feedback on options as work develops and decisions are made. Final decisions are the responsibility of the President with input from the consultants, the Task Force, and campus constituents.

4. Space Programming, Study, and Design Services

- 1) **Facility Program Plan Part I:** The consultant team shall guide UBalt in defining the components of the Part I Program, recognizing that the Program will likely include full or partial demolition of the existing Academic Center and construction of a new

Academic Center in the same location although potentially with a smaller footprint. Portions of the existing Academic Center that are not demolished will require renovation.

2) Facility Program Plan Part II

The consultant team shall develop the Part II program for the new Academic Center capital project in compliance with the State of Maryland DBM Regulations (per link above). A cost estimate for the Academic Center project will be required as a component of the Part II Program.

Additional Services: The University reserves the right to request from the consultant, fee proposals for additional consultant services including but not limited to Feasibility Studies, interdependent Space Planning, Engineering Reports, and other Design and Construction Phase Services in the future.

5. Deliverables

The consultant will provide print and electronic versions of documents for the Academic Center Facility Program Part I and the Academic Center Facility Program Part II. Documents are to be attractive, informative, and persuasive. The content and form are to adhere to State requirements for these Programs. The documents will include all narratives, tables, graphics, and maps in a format that can be modified by UBalt as needed.

END OF SECTION II

SECTION III.

Article 1. SUBMISSION AND TECHNICAL PROPOSAL RESPONSE REQUIREMENTS

1.1. SUBMISSION.

Proposals are to be provided to the Issuing Office in accordance with the Solicitation Schedule. Submit Proposals using the following Team Dynamix link [Proposal Submission](#).

Proposal documents are to be submitted as an attachment in PDF format (no zipped files). Hyperlinks to software products sent to the Issuing Office that indicate that the Proposal is posted by the Proposer on an electronic site may be rejected or considered non-responsive if contract terms and conditions (i.e., a Click-Through Agreement) are required to be accepted by the University in order to download the Proposal. By providing the Proposal to the University electronically, the Proposer grants the University the unlimited right to generate additional electronic and/or paper copies for distribution for the purposes of review, evaluation and archive.

The University may deem a submission non-responsive if received after the due date and time. The date and time of the submission is time stamped by the Team Dynamix link portal and shall be the official date and time of submission to Procurement.

Financial Proposals shall not be included with Technical Proposals. ONLY shortlisted firms shall be invited to submit a Financial Proposal.

Proposers are to:

SUBMIT ONE PDF TITLED: “FIRM NAME_ TECHNICAL PROPOSAL”

1.2 INITIAL TECHNICAL CRITERIA.

Clear, concise, yet detailed responses to the technical criteria below are to be provided in the Technical Proposal. In addition, the Bid/Proposal Affidavit and Acknowledgement of Receipt of Addenda (if applicable) must be included. Standard sales material may be provided, but must be attached as an appendix rather than included within the body of the Proposal.

Proposers must organize their proposal in the same order as the requirements listed in the RFP. Each requirement must be addressed in the proposal, and that response should be enumerated with the same section numbers listed in the RFP Requirement.

The following information must be furnished in the Technical Proposal per this solicitation. Failure to include any of the items listed below may disqualify your firm’s response. Proposers are requested to compile their Proposals in the same order. It is the Proposer’s responsibility to tailor its response to demonstrate its qualifications to perform the scope of work specifically for the University of Baltimore.

1.3 TECHNICAL RESPONSE REQUIREMENTS.

Proposals that concisely present the information requested in the order and manner requested will be considered more favorably than a Proposal from a Proposer of commensurate qualifications that displays a lack of organization, conciseness, or attention to detail. The Proposal should be divided and organized by clearly defined “Tabs” (sections) referencing the sections/response requirements provided below:

1.3.1 Tab 1: Transmittal Letter. A transmittal letter on the Firm’s business stationery referencing the proposal title and number. The transmittal letter shall be signed by an individual who is authorized to bind the firm to all statements, including services and financial statements, contained in the Proposal, must accompany the Technical Proposal. The letter should be an executive summary that clearly and concisely summarizes the content of the Technical Proposal. Include the Proposer’s official business address and state in which it is incorporated or organized (if Proposer is not an individual). **An appropriate contact name, title, phone number, and email address should also be provided for use by the University during the procurement process.** Do not include price information in the transmittal letter.

Signing of Forms: A Proposal, if submitted by an individual, shall be signed by the individual. If submitted by a partnership, a Proposal shall be signed by such member(s) of the partnership with authority to bind the partnership. If submitted by a corporation, a Proposal shall be signed by an officer, and attested by the corporate secretary or an assistant corporate secretary; if not signed by an officer, there must be attached a copy of a board resolution or that portion of the by-laws, duly certified by the corporate secretary, showing the authority of the person so signing on behalf of the corporation.

1.3.2 Tab 2: Table of Contents.

Include a Table of Contents displaying the organization of the proposal being submitted.

1.3.3 Tab 3: Company/Firm Profile.

Organizational Chart: An organizational chart of the respondent's team is to be submitted, including

- a) the names and roles of all participating firms (if relevant);
- b) names and roles of all key personnel within each firm (including a clear hierarchy of managements roles/ responsibilities); and
- c) how the firms relate to one another.

Company Profile (Form provided, see Appendix A): The respondent shall submit a general company profile of each firm on its team. Information provided should include, but not be limited to, number of years in business, principals of the firm, and number of employees (and their roles), etc.

1.3.4 Tab 4: Past FMP and FPP Services Experience.

List and individually describe the three (3) past FMP and three (3) past FPP projects (a total of 6 projects) that have been fully completed and best illustrate the firm's qualifications. Respondents should include projects where the key individuals who were directly responsible for and directly assigned to the past projects are also similarly assigned to this project. Respondents shall provide examples of relevant projects of similar size and scope to this RFP that have been successfully completed within the last ten years. FPP projects should clearly show both Part 1 and Part II components when applicable, or explain if both are not provided. Information for each project shall be no more than 4 pages (excluding visuals).

Respondents shall provide the following information for each of the six projects:

1. Client name, address, point of contact, phone number and email address (the point of contact should be a person who was directly responsible for the project); **(this information shall be used for client references)**
2. Project start and completion date.
3. Key personnel within the firm responsible for the project along with a description of their roles during the project;
4. A short description of the FMP and FPP services, and describe the Clients' mission and vision.

The contractor shall have a minimum of ten years successful experience in the FMP and FPP services.

The contractor shall have actively engaged in and satisfactorily performed the requested scope of work (FMP, and FPP Part I and Part II) for a University within the last ten years.

1.3.5 Tab 5: Key Personnel and Project Team (Form provided, see Appendix A).

Resumes are to be provided of only the key personnel for (a) the FMP and (b) the FPP services, showing the individual names and roles for each of these components. The proposing firm is not to provide resumes of all employees, but rather those people who will be intimately involved with the project such as the Principal in Charge, Project Architect and Project Manager. Specifically, the respondent is to submit resumes of those individuals with whom the University would be directly working should the respondent be selected; that is, the people the University will see on a regular basis and who will attend planning and progress meetings, conduct listening sessions, present analysis and options, etc.

Each resume should include the person's educational background, employment history, area of expertise, similar/relevant project experience, and a description of the person's role on this project.

Key Personnel References: Provide two (2) project references on each of the proposed key people inclusive of contact person, phone number including extension if applicable, and email address (in the space provided on the Key Personnel Form). Such references are to be project references on the Key Personnel Form not employment references; that is, the University is interested in speaking to a Project Owner regarding the person's performance on a particular project. Please ensure that the information is accurate and that the reference named can speak to the individual's performance in the role to be assigned on this project.

Personnel Commitment: By submitting the names of these key personnel for consideration, the Proposer is committing these people to the University for the Project's duration if awarded the contract. No personnel changes will be permitted without written authorization from the University prior to such changes or assignments occurring via a contract modification issued by the Procurement Officer.

In the event that circumstances necessitate to add or substitute staff for any of the key personnel positions designated, the individual(s) proposed must demonstrate similar qualifications, experience, and documentation as required in this RFP to successfully perform such duties, and sufficient information to demonstrate that the proposed individual(s) meets or exceeds the qualifications of the Key Personnel to be replaced. The Procurement Officer shall have the sole right to determine whether key personnel proposed as substitutes qualify.

1.3.6 Tab 6: Other Requirements and Forms.

- **Acknowledgement of Receipt of Addenda Form (see Appendix A).**
If any addenda to the RFP documents are issued prior to the due date and time for Proposals, this form must be completed, signed, and included in the Proposer's Technical Proposal.
- **Bid Proposal Affidavit (see Appendix A).**
Complete and sign the Proposal Affidavit and enclose with the Technical Proposal.
- **Conflict of Interest Affidavit and Disclosure (see Appendix A).**
- **Insurance.**
Provide a copy of a Certificate of Insurance verifying your firm's Coverage for Professional Liability, Commercial General Liability, Workmen's Compensation, Automobile Liability Insurance, and Professional Liability.

▪ **Acknowledgement of Review of Contract Statement.**

The University Contract for this Procurement will contain the provisions in Appendix C as well as any additional terms required by the University. By submitting a Proposal, the Proposer warrants that they have reviewed Appendix C and will execute a contract: a) in substantially the same form; and b) with these terms and conditions. The University will issue a purchase order in its financial system for accounting purposes only.

Proposers are to include a statement that the University's Contract terms and condition were reviewed and accepted.

Any exceptions to the Contract or terms and conditions are to be addressed and provided in this section of the Proposer's proposal/submission.

END OF TECHNICAL RESPONSE REQUIREMENTS

SECTION III.

Article 2. FINANCIAL PROPOSAL RESPONSE REQUIREMENTS ONLY INVITED FIRMS

2.0 Financial/Price Proposal

2.1 SUBMISSION.

Proposals are to be provided to the Issuing Office in accordance with the Solicitation Schedule. Submit Proposals using the following Team Dynamix link [Proposal Submission](#).

Proposal documents are to be submitted as an attachment in PDF format (no zipped files). Hyperlinks to software products sent to the Issuing Office that indicate that the Proposal is posted by the Proposer on an electronic site may be rejected or considered non-responsive if contract terms and conditions (i.e., a Click-Through Agreement) are required to be accepted by the University in order to download the Proposal. By providing the Proposal to the University electronically, the Proposer grants the University the unlimited right to generate additional electronic and/or paper copies for distribution for the purposes of review, evaluation and archive.

The University may deem a submission non-responsive if received after the due date and time. The date and time of the submission is time stamped by the Team Dynamix link portal and shall be the official date and time of submission to Procurement.

Proposers are to:

SUBMIT ONE PDF TITLED: “FIRM NAME_FINANCIAL PROPOSAL”

2.2 Financial/Price Proposals. See Appendix B for the Pricing Form

Proposers must complete and submit the Price Proposal Statement Form included in Appendix B.

Submit two separate forms:

1. Facilities Master Plan
2. Academic Center Facility Program Plan. The Academic Center Facility Program Plan shall itemize the price for Part I, the price for Part II and the Total for the Facility Program Plan.

Each price form shall include: Cost Schedule, Summary of Quoted Rates including a lump sum price for all services as requested. The price form shall acknowledge the stated deliverable dates for the FMP and the Academic Center FPP Part I and Part II.

The Price Proposal Forms must be signed by an individual authorized to bind the contractor and must include the contractor's name, typed or written legibly.

**SECTION III
EVALUATION PROCESS**

Article 3 INITIAL TECHNICAL EVALUATION AND SELECTION PROCESS

3.1 Evaluation Committee

All Proposals received by the closing deadline will be evaluated. The Procurement Officer shall establish an Evaluation Committee to review and rate the proposals. The Committee may request additional technical assistance from any source within the State.

3.2 Classification of Proposals

The Procurement Officer shall review each proposal for compliance with all necessary specifications and requirements of this RFP. Failure to comply with any specification or requirement will normally disqualify a firm's proposal. The term, "qualified firm" includes only those responsible firms that submitted proposals initially classified by the Procurement Officer as reasonably susceptible of being selected for award. The term does not include those firms that submitted proposals not reasonably susceptible of being selected for award or that are not deemed responsible.

The Procurement Officer shall have the sole authority to determine whether any deviation from the requirements of this RFP is substantial in nature. The Procurement Officer may waive or permit to be cured minor irregularities in a proposal, which are immaterial or inconsequential in nature whenever it is determined to be in the University's best interest.

3.3 Evaluation and Recommendation

The evaluation shall be based on the evaluation factors set forth in the RFP. Technical proposals and Financial Proposals shall be evaluated independently of each other. Firms are advised that for purposes of evaluation, technical merit is of greater importance than financial merit. Based on its evaluation of the technical and financial proposals, the Evaluation Committee will make a recommendation to the procurement officer for the award of the contract to the responsible offeror whose proposal is determined to be the most advantageous to the University, considering both technical and financial factors as set forth in the RFP.

3.4 Technical Evaluation Criteria

The evaluation of proposals will be made from the criteria as listed below. The criteria for the proposal evaluation are listed below in descending order of importance. Please see Section III, Article I for submission of information required in Firm's proposals. Technical considerations are of greater importance than the financial considerations.

1. Relevant Past Experience with successful development in Higher Education of
 - (a) Facilities Master Plans and
 - (b) Facility Program Plans Part I and Part II.
2. Expertise and experience for successfully addressing the particular requirements set forth in the Statement of Work of this Request for Proposals for
 - (a) the **UBalt** Facilities Master Plans and
 - (b) the **Academic Center** Facility Program Plans Part I and Part II.
3. Relevant Qualifications of Key Personnel and the Project Team
4. Company Profile and Experience
5. Reference Letters and References

Proposals cannot be modified, supplemented, or changed in any way after the due date and time for proposals, unless specifically requested by the University.

3.5 Shortlisting. In accordance with the Evaluation Criteria, a shortlist may be developed based on the initial written technical proposals. All Proposers will be notified of the results as they pertain to their respective Technical Proposal.

3.6 Interviews/Oral Presentations/Discussion Sessions

3.6.1 Purpose. Based on the Evaluation Committee’s Initial Technical Evaluation, the University may invite, without cost to itself, the shortlisted Proposers to an oral presentation/discussion session (“Discussion Session”).

The purposes of the sessions are as follows:

- (i) To provide the Proposer the opportunity to demonstrate its product/services;
- (ii) To discuss/clarify any and all aspects of the Technical Proposal, in particular the proposed Services/product, options, approach/methodologies, implementation process, schedule, staffing of the contract, and ongoing support and other applicable professional services;
- (iii) To allow the University to meet the Proposer's key personnel, technicians and for these personnel to convey directly their experience and expertise in the proposed services/product and its implementation; and
- (iv) To provide an opportunity to clarify the scope of services for the intended contract and discuss any items addressed in the Technical Proposal that may require additional clarification.
- (v) If applicable, review the Price Proposal structure.

3.6.2 Format. The Oral Presentations will be informal, as the University is not interested in a sales presentation by executives and business development staff; rather, the University is requesting evidence of the Proposer’s ability to meet the University’s requirements and an interactive discussion with each of the shortlisted Proposers. It is important that those key personnel who are proposed to be assigned to the University fully participate in the presentation and discussion. Ample time will be available for the University and the Proposer to ask questions and discuss issues and concerns related to the product, the scope of the services, and the Proposer’s

capabilities and qualifications. We anticipate that the Discussion Session will be approximately 60-90 minutes in length, to be determined at a later date.

3.6.3 Date. The times and dates for the Oral Presentations, if any, will be set upon completion of the Initial Technical Evaluation. UBalt reserves the right to hold additional discussion or scope review interviews, if deemed necessary to evaluate a firm's qualifications and proposal.

3.7 Second Phase Technical Evaluation

3.7.1 Criteria. Following the Oral Discussion Session held with shortlisted Proposers (if such sessions were held), a Second Phase Technical Evaluation will be conducted. The Evaluation Committee will re-evaluate all criteria of the Technical Proposals of shortlisted Proposers, incorporating assessments of the Oral Discussion Session and outcomes of reference checks, if performed. The University reserves the right to make a determination that a Proposer is not shortlisted prior to completing reference checks.

3.7.2 Process. Further shortlists may result as the procurement progresses. At each phase of the process, those firms that do not remain shortlisted will not progress in the procurement. All Proposers will be notified of the results of the Evaluation as they pertain to their respective Proposals.

At the sole discretion of UBalt, Proposers who have submitted Technical Proposals evaluated by UBalt to be viable and of further interest (i.e. "shortlisted") may be requested to provide UBalt additional technical information to further clarify the Contractor's technical qualifications. If additional information is requested of one or more Proposers, the Procurement Officer will so advise.

Once a final shortlist of proposals is established, the University will rank the technical proposals from highest to lowest.

The University may perform separate evaluation ratings and combine the evaluations as each phase is completed, or combine all ratings for each phase to determine the final ranking.

The University may incorporate references prior to or after establishing the final shortlist of proposals. However, the University reserves the right to modify scoring if pertinent information regarding a Proposer's capability is obtained prior to an award. Once a final shortlist of proposals is established, the Committee will rank the remaining Proposals from highest to lowest.

Those Contractors that are not shortlisted will not progress in the procurement. Multiple shortlists may result as the procurement progresses.

SECTION III

ARTICLE 4 PRICE PROPOSALS AND FINAL EVALUATION PROCESS

4.1 Price Evaluation

Price Proposals will not be opened publicly. Price Proposals will be evaluated based on the full cost of the FMP and FPP services.

The University may elect to request Best & Final Price Proposal(s).

The University will establish a financial ranking of the proposals from lowest to highest total offers.

Discussions. The University reserves the right to recommend an Offeror for contract award based upon the Offeror's technical proposal and price proposal without further discussion. However, should the Committee find that further discussion would benefit the University and the State, the Committee shall recommend such discussions to the Procurement Officer. Should the Procurement Officer determine that further discussion would be in the best interest of the University and the State, the Procurement Officer shall establish procedures and schedules for conducting discussions and will notify responsible Offerors.

4.2 Best and Final Offers. When in the best interest of the University and the State, the Committee may recommend and the Procurement Officer may permit qualified Offerors to revise their proposals by submitting "Best and Final" offers.

4.3 Final Ranking and Selection

Following evaluation of the technical proposals and the price proposals, the Evaluation and Selection Committee will make an initial overall ranking of the proposals and recommend to the Procurement Officer the award of the contract to the responsible Offeror whose proposal is determined to be the most advantageous to the University and the State of Maryland based on the results of the final technical and financial evaluation in accordance with the University System of Maryland Procurement Policies and Procedures. Technical merit will have a greater weight than financial in the final ranking.

Award may be made to the proposal with a higher technical ranking even if its cost proposal is not the lowest. The decision of the award of the contract will be made at the discretion of the Procurement Officer and will depend on the facts and circumstances of the procurement. The Procurement Officer retains the discretion to examine all factors to determine the award of the contract. The goal is to contract with the Contractor that provides the best overall value to the University.

The University may select one or more Contractors to further engage in negotiations, including terms of a contract and other issues to be incorporated into the contract. The University reserves the right to make an award with or without negotiations.

- 4.4 Negotiations.** The University may select for award one or more Proposer(s) to negotiate the terms and conditions of the Contract. The University reserves the right to make an award with or without negotiation. In the event negotiations between the selected contractor and the University fail to mutually agree on any terms and conditions, the University may rescind the award and conduct negotiations with the 2nd highest ranked firm/contractor. Additionally, if the Contractor fails to actively pursue the finalization and execution of the Contract, the University may rescind the Contract, at any time prior to the full execution of the Contract.

END OF SECTION III