

**UNFP 6.3.7.3.1 Program Manager RFQ Template**



**REQUEST FOR QUALIFICATIONS  
PROGRAM MANAGEMENT SERVICES**

DATE ISSUED: \_\_\_\_\_

**THE NEBRASKA BOARD OF REGENTS**

for and on behalf of

\_\_\_\_\_ UNIVERSITY

**REQUEST QUALIFICATIONS FOR:**

**(PROJECT/CONTRACT NUMBER)**

\_\_\_\_\_

**(PROJECT TITLE)**

\_\_\_\_\_

**DUE DATE/ TIME:** \_\_\_\_\_

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Time and Date of Pre-Submittal Conference  
Deadline for Inquiries  
Time and Date Set for Submittal

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## UNFP 6.3.7.3.1 Program Manager RFQ Template

### REQUEST FOR QUALIFICATIONS (RFQs) FOR PROGRAM MANAGEMENT SERVICES

(PROJECT TITLE)

#### INFORMATION AND INSTRUCTIONS TO OFFERORS

##### **1 GENERAL INFORMATION**

- 1.1 The University of Nebraska intends to procure a qualified professional Program Manager (PM) to provide management of design and construction services for the \_\_\_\_\_ (Project/Program/Contract). The estimated contract value is \$ \_\_\_\_\_.
- 1.2 The Statement of Qualifications (SOQ) must be received by the \_\_\_\_\_ (office address) at \_\_\_\_\_ (city), Nebraska, by \_\_\_\_\_ local time, \_\_\_\_\_, 200\_\_.
- 1.3 Questions pertaining to the selection process should be directed to \_\_\_\_\_ at \_\_\_\_\_.
- 1.4 The University of Nebraska shall not be held responsible for any oral instructions. Any changes to this Request for Qualifications (RFQ) will be in the form of an addendum, which will be furnished to all registered RFQ holders.
- 1.5 The University of Nebraska reserves the right to reject any or all SOQs, to waive any informality or irregularity in any SOQ received, and to be the sole judge of the merits of the respective SOQs received.
- 1.6 A pre-submittal conference for the Contract will be held \_\_\_\_\_ (date), 200\_ at \_\_\_\_\_ a.m./p.m. at \_\_\_\_\_ (location). University staff will discuss the scope of work, general contract issues and respond to questions from the attendees. Because staff will not be available to respond to individual inquires regarding the project scope outside of this pre-submittal conference, attendance at this pre-submittal conference is highly recommended.
- 1.7 The Contract description is:
- 1.8 The PM will be selected on the basis of demonstrated competence and qualification for the type of services required without regard to fee, and thereafter the University will negotiate a contract for the program management services at a fair and reasonable fee with the best qualified firm.

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### **2 - ANTICIPATED SCOPE OF WORK**

2.1 After being selected, the PM will execute a contract with the University. The following information conveys an overview of the type and scope of services that could be provided by the PM in their contracted role as an extension of the University's staff:

#### **Capital Development Process**

- Working as an extension of the University's staff and in the University's interests, assist the University in development of all phases of the Capital Development Process.
- Assist in development of budget, schedule, and program parameters, including project delivery method.
- Manage selection process of A/E, Low Bid General Contractor, Construction Manager at Risk, or Design Builder.

#### **Project Design Phase**

- Monitor the preparations of program, drawings, specifications and other design documentation prepared by A/E and other consultants.
- Submit applications for regulatory reviews and permits, on behalf of the University, and maintain involvement throughout the review and approval process, including contacting and working with government officials, local utility providers, and any other entities that would impact the project.
- Coordinate with the A/E, and attend meetings associated with the site plan and facility design approvals process.
- Prepare a cost model of the program and concept design prepared by the A/E, then prepare cost estimates, or updates.
- Review design to identify and address constructability issues.
- Assess the ease or difficulty of constructing the proposed design and make recommendations for practical changes.
- Make recommendations for specification changes when preferred specifications are likely to limit competition or cause excessive delays in delivery.
- Provide weekly written and periodic verbal reports on the progress of the design phase, including significant issues to be addressed and the plan of action to handle those issues.
- Coordinate alternatives assessment value engineering to evaluate the most cost-effective methods for achieving objectives including a formal VE Workshop Session as required.
- Develop market-responsive strategy for purchasing construction materials, equipment and services via competitive bidding.

#### **Construction Phase**

The PM's primary responsibilities to ensure effective supervision and administration will include:

- Establishing on-site organization and lines of authority. Maintain competent full-time project personnel at the project site.

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- Schedule and conduct construction progress meetings on a regular basis and record/distribute minutes .
- Assure the phasing of all trade contractors and suppliers is being planned and properly implemented by the contractor for efficient completion of the work.
- Coordinate required regulatory inspections.
- Ensure that all subcontractor supervision, personnel, equipment, materials and testing are acceptable and in conformance with drawings, specifications, contract documents and building codes.
- Maintain cost accounting records in accurate, orderly detailed fashion under an open book approach, with monthly reporting to be provided in a format acceptable to the University.
- Prepare and submit monthly reports to the University that document the project's progress, data and significant matters that require management response.
- Receive, review and deliver to the University all shop drawings, brochures, samples, as-built drawings, operating materials and instructions, warranties, keys and maintenance stock.

### **3 - STATEMENT OF QUALIFICATIONS SELECTION CRITERIA**

3.1 The PM will be selected through a qualification-based selection process. Firms interested in providing program management services must submit a Statement of Qualifications (SOQ) that addresses the following evaluation criteria. Applicants are encouraged to organize their submissions in such a way as to follow the general evaluation criteria listed below. Information included within the SOQ may be used to evaluate your firm as part of any criteria regardless of where that information is found within the SOQ. Information obtained from the SOQ and from any other relevant source may be used in the evaluation and selection process.

3.2 Cover Letter (1-page) containing at a minimum:

Company name, contact name, address, fax number, and email address

3.3 Qualifications Criteria

#### **3.3.1 General Information**

Description of firm/team

Legal company organization; organization chart with names

List of applicable Nebraska licenses

#### **3.3.2 Relevant Firm Experience**

**( \_\_\_ points)**

- a. Applicant's overall reputation, service capabilities and quality as it relates to this project.

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- b. List and briefly describe 3-5 comparable projects completed by your firm or currently in progress; include your firm's role, and discuss contract amendment history, if applicable. For each project, include: contract value (original value plus contract amendments, if applicable), project owner, project location, contact name and title, address, current/accurate telephone number, fax number, and email address (if available).
- c. A minimum of three referrals and references from other agencies and owners. If possible, references should be from the projects listed above.
- d. List and describe any litigation; arbitration; claims filed by your firm against any project owner as a result of a contract dispute; any claim filed against your firm; termination from a project.
- e. Applicant's capacity and intent to proceed without delay if selected for this work.

#### **3.3.3 Team Experience & Qualifications (\_\_\_ points)**

- a. Describe each team member's position within the firm. Provide resumes of each proposed team member in Appendix A. List professional continuing education.
- b. Briefly describe each team member's role on this project.
- c. Provide "team" experience working together on similar projects.
- d. Identify proposed subconsultants.
- e. Explain your understanding of, and experience with, the Design Build and Construction Manager at Risk Delivery Methods.

#### **3.3.4 Project Understanding and Approach (\_\_\_ points)**

- a. Describe your understanding and approach of program management.
- b. Identify and discuss any potential problems during design and construction.
- c. Identify and discuss methods to mitigate those problems.

#### **3.3.5 Approach to Project Management (\_\_\_ points)**

- a. Describe your approach to change orders.
- b. Describe your planning, scheduling, estimating, and construction management tools.
- c. Describe your quality control plan, dispute resolution, and safety management.

#### **3.3.6 Other Factors (\_\_\_ points)**

- a. Current workload and ability to proceed promptly.
- b. Willingness to abide by the University's standard form Agreements with few or no objections or changes.
- c. Provide statement regarding your assurance that this engagement will not result in a conflict of interest.
- d. Relevant factors impacting the quality and value of work.

### **4 - SUBMITTAL REQUIREMENTS**

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- 4.1 The SOQ shall include a one-page cover letter plus a maximum of fifteen (15) pages to address the SOQ criteria specified in Section 3 (excluding Resumes). Table of Contents and section divider pages do not count towards the total page count. Resumes for each key team member shall be limited to no more than two pages and shall be attached as Appendix A.
- 4.2 \_\_\_ # \_\_\_ copies of the Statement of Qualifications and Appendix A must be submitted to \_\_\_ - (office address) \_\_\_ at \_\_\_ (city) \_\_\_, Nebraska, by \_\_\_ local time, \_\_\_, 200\_\_.
- 4.3 Failure to comply with the following criteria may be grounds for disqualifications:
- Receipt of submittal by the specified cut-off date and time.
  - The number of originals and/or copies of the submittal specified.
  - Adherence to maximum page requirements.
- 4.4 Adherence to the maximum page criteria is critical; each page side (maximum 8 1/2" x 11") with criteria information will be counted. Pages that have photos, charts and graphs will be counted towards the maximum number of pages.

### **5 - SELECTION PROCESS AND SCHEDULE**

- 5.1 A minimum 5-member Project Evaluation Board will evaluate each Statement of Qualifications (SOQ) according to the above criteria and select a minimum of three finalists that will be Short Listed for the project. The Short List firms will meet with the Project Evaluation Board for interviews. The purpose of the interview will be to expand on the information provided in the SOQ, not to repeat information already provided. Those firms selected for the Short List will be provided additional instruction by the University. Those firms not selected for further consideration will be notified.
- 5.2 The following tentative schedule has been prepared for this project. Firms interested in this project must be available on the interview meeting date.

Pre-submittal conference: \_\_\_\_\_  
SOQs due: \_\_\_\_\_  
Firms notified for interview: \_\_\_\_\_  
Interviews: \_\_\_\_\_

- 5.3 Following the interviews the Project Evaluation Board will determine a ranking for each Short List firm based on the published criteria in 3.3 of this RFQ. Consideration will be given to both the written Statement of Qualifications and any oral presentations or interviews. No other factors or criteria will be used in the qualification ranking.
- 5.4 The highest ranked firm will be recommended for contract award.
- 5.5 Requests for debriefings or to review Statements of Qualifications submitted, shall be made in writing to the University. All information submitted by firms and related Project Evaluation Board evaluations and rankings shall be considered confidential until after contract execution and award by the Board of Regents.

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- 5.6 The University will enter into negotiations with the selected firm and execute a contract upon completion of negotiations of program management services for Board of Regents approval. If the University is unsuccessful in negotiating a contract with the highest ranked team, the University may then negotiate with the second or third highest ranked team until a contract is executed, or may decide to terminate the selection process.

#### **6 - ATTACHMENTS**

- 6.1 Draft Program Management Contract
- 6.2 Architectural Program (if available - can be examined if not attached)
- 6.3 [Any University-required certifications, etc.]