

PENNSSTATE



REQUEST FOR PROPOSAL

PROJECT MANAGEMENT SERVICES

THE PENNSYLVANIA STATE UNIVERSITY

GREATER PHILADELPHIA INNOVATION CLUSTER PROJECT

BUILDING 661 - PHILADELPHIA NAVY YARD

PHILADELPHIA, PA

JUNE 7, 2011

PSU PROJECT #03-03808

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1.0 PROJECT DESCRIPTION & SCHEDULE

The Pennsylvania State University (Owner) is seeking the services of a professional Project Management Firm to provide lifecycle project management services in support of the retrofit of Building 661 (38,000 square feet) into the Greater Philadelphia Innovation Cluster (GPIC) Headquarters at the Philadelphia Navy Yard. GPIC is a national DOE HUB that is focused on research to improve energy efficiency and operability within new and existing buildings. At this time, the Owner is seeking a Project Manager (“PM”) to provide professional project management services in conjunction with the project. The Integrated Design Team and Construction Manager (as agent) for this project have not been selected.

Following is an estimated project schedule:

PM Proposals Due	June 28, 2011
PM Notice to Proceed	July 29, 2011
Design Phase	July 2011 – September 2012
Bid Phase	August 2012 – October 2012
Construction Phase	October 2012 – December 2013
Close-Out Phase	January 2014 – March 2014

2.0 SCOPE OF SERVICES

- 2.1 Establish and manage a formalized Integrated Project Delivery (IDP) approach to the project.
- 2.2 Follow the stage gated, deliverable focused Project Delivery process as outlined in the PSU OPP Project Delivery Guidebook.
- 2.3 Attend and participate in all GPIC related meetings as necessary and will be responsible for assuring meeting minutes are produced and distributed.
- 2.4 Develop a Project Management Plan, including project objectives and success criteria, deliverables, role/responsibilities/contact information, communication protocols, document control methodology, cost management, schedule management and quality management plans.
- 2.5 Develop and maintain the overall project milestone schedule, and review and verify the integration of the Design Team's services & deliverables, Owner's responsibilities, permitting requirements, and anticipated construction schedules (including long-lead-time items).
- 2.6 Develop and maintain a Project Risk Management Plan throughout the project life.
- 2.7 Manage and oversee the Project Budget (including construction costs, soft costs, FF&E, and contingency) and provide a bi-weekly report to the owner.
- 2.8 Review and comment on the Construction Manager's Bid & Procurement Plan, specifically on the recommended packaging of the work and methods to optimize bidder interest. Review the Construction Manager's bid analysis, and make a recommendation to the Owner. Assist the Owner in preparing the Construction Contracts and ensure close coordination with PSU OPP Contract Administration.
- 2.9 Establish and manage a document control solution, including document structure, file types, access and security.
- 2.10 Assist the Owner in qualifying, selecting, retaining, and coordinating additional professional services, including Design Team, Construction Manager, General Contractors, Surveyors and Testing Laboratories. Prepare and issue RFPs, conduct bid tabulations, evaluate proposals, and make recommendations to the Owner.
- 2.11 Assure all required permits are obtained for the project.
- 2.12 During construction, advise the Owner regarding the status of budget, schedule and quality by issuance of a Monthly Project Report. The Project Manager will advise the Owner, in a timely manner, of situations which have increased, or may increase the cost of the Project; may cause a delay in the completion of the

- Project; has or may result in the installation of work or material which is not acceptable and in accordance with plans and specifications developed for the Project.
- 2.13 Schedule and conduct on-site bi-weekly progress meetings involving the Owner, Designer, and Construction Manager to review, resolve and plan in areas such as budget, schedule and quality. Meeting Minutes will be recorded and distributed, including an Outstanding Action Item Log, detailing the status of key decisions, responsibility and required timing.
 - 2.14 Review requests for changes, submit written recommendations to the Owner and negotiate Change Orders, with final terms and price subject to approval by Owner.
 - 2.15 Review applications by Consultants and Trade Contractors for progress and final payments.
 - 2.16 Review the CM's Master Project Schedule and advise the Owner on issues potentially impacting timely completion.
 - 2.17 Establish an IT platform for the exchange of real-time project information between the Owner, PM, Design Team and Construction Manager.
 - 2.18 Maintain at the Project site for the Owner, one PDF electronic record copy of Contracts, Drawings, Specifications, Addenda, Change Orders and other modifications, in good order, and in addition, approved Shop Drawings, Product Data, Samples and similar required submittals. The Project Manager will make such records available to the Owner during the performance of the work and upon completion of the Project will deliver them to the Owner in electronic form.
 - 2.19 With the Owner's maintenance personnel, design consultant, and commissioning agent, the PM will observe the Trade Contractor's final testing and start-up of utilities, operational systems and equipment.
 - 2.20 Coordinate all inspections to determine whether the Work is substantially complete, including review and feedback regarding the Construction Manager's punch list.
 - 2.21 Receive and review for completeness all manuals, warranty information, attic stock and record drawings for delivery to the Owner.
 - 2.22 Schedule and facilitate a Lessons Learned meeting at the conclusion of the project, including recording and documenting the meeting activities and submitting a report to the Owner.

3.0 PROPOSAL FORMAT

The Project Manager's Proposal will provide, in the following order, required information in order to demonstrate that the company has the experience, knowledge, personnel and equipment needed to successfully complete its services. The proposal will be limited to 30 pages, single sided, minimum 11 point font. The required submittals are:

- 3.1 Cover Letter: Provide a cover letter introducing your firm and proposal. Letterhead should indicate the address of the performing office.
- 3.2 Company Overview: Provide an overview of the company detailing the total number and discipline breakdown of professional staff, their professional credentials (i.e. CCM, PMP) and the history of the company.
- 3.3 Project Management Firm Experience / Project Profiles: Provide a maximum of 10 project profiles. Preferred projects presented should demonstrate experience with the following attributes: integrated project delivery, research & development, business incubation, adaptive reuse and sustainability. For each project include the client name, project name, project location, summary of services performed, and construction budget. Provide Owner references for three (3) of the projects, including name, title, and phone number.
- 3.4 Key Project Personnel / Project Organization:
 - 3.4.1 Key Personnel: PM should have minimum 20 years experience in the construction industry. Given the adaptive reuse element of the project, strong consideration will be given to a Leadership in Energy and Environmental Design (LEED) Accredited Professional. **Construction Management Association of America (CMAA) Certified Construction Manager (CCM) designation preferred.** Provide detailed resume for the Project Manager candidate and supporting professionals who will be performing the services. Resumes should include years of experience, summary relevant experience, education, professional registrations & certifications and awards / industry recognition.
 - 3.4.2 Project Organization: Provide an organization chart. Identify roles and responsibilities, reporting relationships and use of subconsultants. Identify whether project management services will be self-performed or utilize subconsultants. Identify each sub consultant.
- 3.5 Project Approach: Present your understanding of the Project and the scope of the services required. Include how your firm provides Project Management Services in the Design, Construction and Project Close-Out Phases.
- 3.6 Fee: The basis of compensation will be an Estimated Total Fee to provide the scope of services. Provide a breakdown by 1) Design Phase; 2) Construction Phase; 3) Close-Out Phase; and 4) Reimbursable Expenses. Reimbursable Expenses will be listed in detail, separately, and at cost. Assume an office will be provide at the Navy Yard and that the Project Manager will be a full-time assignment starting on August 1, 2011.
- 3.7 Insurance: The firm will provide evidence of professional liability and business insurance, with a minimum of:
 - 3.7.1 Public Liability and Property Damage.

- 3.7.1.1 Bodily injury liability, including death (\$1,000,000.00 each occurrence).
- 3.7.1.2 Property damage liability (\$300,000.00 each occurrence).
- 3.7.1.3 Owner will be a named Additional Insured.
- 3.7.2 Automobile Liability Insurance: Coverage for Owner, non-Owner, hired, leased and rented vehicles. Automobile liability insurance in an amount not less than \$1,000,000.00 combined single limit for Bodily Injury and Property Damage in any one occurrence.
- 3.7.3 Excess Liability Insurance: \$2,000,000.00.
- 3.7.4 Workmen's Compensation: Statutory benefits as required by the Workers Compensation Laws of the Commonwealth of Pennsylvania.
- 3.7.5 Professional Liability with a minimum limit of liability of \$2,000,000 per claim and in the aggregate. Such insurance will be maintained for a period of two (2) years following completion of the Project.
- 3.7.6 Coverage afforded under the policies will not be canceled, allowed to expire, or in any way changed, including alterations to conditions of the policy, until at least 30 day written notice has been given to the Owner.

4.0 SELECTION CRITERIA

The Owner will evaluate the proposals for the PM based on the following criteria:

- 4.1 Proposed PM: Education, experience, leadership capability, and past performance.
- 4.2 Relevant Experience: The experience of the Proposed PM in performing similar services for building projects of similar scope. This includes their understanding of the problem and the soundness of their approach.
- 4.3 Responsiveness: The proposal will be examined to verify that the Proposer has submitted both the documentation requested and is responsive to the detailed specifications for the project.
- 4.4 Fee: The Proposer's Estimated Fee.
- 4.5 After the receipt of proposals, the selection committee will review the credentials of each firm. The Owner reserves the right to select based solely on the strength of the proposals. Firms may be shortlisted and selected for an interview. Selected firms will make presentations to and will be interviewed by a committee which will evaluate, select, and recommend the firms deemed best qualified to undertake a project of this size and scope, based on quality of work as judged from previous experience and references and staff capabilities. Key staff members are expected to participate in the interview. The Owner will negotiate with the firm selected for professional services and compensation the Owner determines to be fair and reasonable. If negotiations with the selected firm cannot be consummated to the satisfaction of the Owner, then the firm will be so

notified in writing and negotiations may be initiated with other firms recommended by the committee.

- 4.6 If selected as the PM, the successful firm will be disallowed from consideration on any other aspects of the project.
- 4.7 The Owner does not obligate itself to accept the lowest proposal or any proposal, and reserves the right to waive any informalities in any or all of the proposals, and to reject or accept any proposal.
- 4.8 Due to the nature of this project, the Owner would like to discuss the opportunity for the contribution of In-Kind Services up to 25% of the fee amount. This will not be a criteria for selection, but the Owner would like to discuss this with the successful Proposer. Contribution may be comprised of personnel costs, office, travel, meeting, and other direct expenses, overhead costs, purchased services, and other costs associated with carrying out the project.

5.0 SUBMITTAL REQUIREMENTS

Each responding firm will email The Pennsylvania State University point of contact shown below affirming they intend to submit a proposal. Include submitting firm's point of contact information.

All questions regarding this RFP are required in writing, via email, to:

The Pennsylvania State University
Mr. John Bechtel, PE
Assistant Director, Design & Construction
Office of Physical Plant
University Park, PA 16802
Email: JRB115@PSU.EDU

The Owner is requesting that those firms interested in providing Project Management Services for the project provide a Proposal, in electronic PDF form, via email to:

Mr. Gregory A. Scott, PE
Director, Commonwealth Services
Office of Physical Plant
The 328 Building, Suite 325
University Park, PA 16802
Email: GAS112@psu.edu

All responses must be received by the Owner by 4:00 PM on June 28, 2011. Responses received after this date and time may not be considered. All proposals in response to this RFP should be clearly marked "The Pennsylvania State University –

Greater Philadelphia Innovation Cluster Project, Building 661 - RFP: Project Management Services”.

Amendments to the RFP will be distributed via email only to firms that confirmed their intent to submit a proposal.