



**Board of Regents of the University
System of Georgia**

**Request for Qualifications
(Step I)**

and

**Request for Proposals
(Step II)**

To Provide

Planning Professional Services

for

Housing Master Plan

Project No. 0463-2019 / Bid-Contract No. 0011-20PQ

**Georgia Institute of Technology
Atlanta, Georgia**

**Solicitation Issue Date: No Later Than July 19, 2019
Qualifications Packages Due: August 20, 2019**

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STEP I
REQUEST FOR QUALIFICATIONS
For
Planning Professional Services
For
Housing Master Plan
Project No. **0463-2019** / Bid-Contract No. **0011-20PQ**
Georgia Institute of Technology, Atlanta, Georgia

The Board of Regents of the University System of Georgia (“BOR”) as (“Owner”), on behalf of Georgia Institute of Technology (“GT”), (“User”) is soliciting statements of qualifications from firms interested in providing planning services for a project known as **Project No. 0463-2019, Housing Master Plan** at Georgia Institute of Technology, Atlanta, Georgia. This Request for Qualifications (RFQ) seeks to identify potential providers of the above-mentioned services. Some firms that respond to this RFQ, who are determined by the Owner to be especially qualified, may be deemed eligible and may be invited to interview and offer proposals for these services. All respondents to this RFQ are subject to instructions communicated in this document, and are cautioned to completely review the entire RFQ and follow instructions carefully. BOR reserves the right to reject any or all statements of qualifications or proposals, and to waive technicalities and informalities at their discretion. For the purposes of this document the term “architect” may be substituted as “planning professional”.

1. GENERAL PROJECT INFORMATION

Project Background

Georgia Tech utilized the services of KWK Architects and Anderson Stricker LLC to update the Campus Master Plan in 2015. The report highlighted student’s perception of living on campus, their desire for more privacy, larger units, private bathrooms, and more independence. Additionally, the report acknowledged the growing market for student housing in Midtown. Since that time, the Georgia Tech Campus has changed but more importantly, development surrounding Georgia Tech has dramatically evolved. There are at least nine private student housing within two miles of the Georgia Tech Campus. In light of this, there is an immediate need to evaluate the future of campus housing for students and perhaps of others such as faculty, staff, and alumni for the next 10 years.

Attached as Exhibits are the following documents for use and reference during preparation of an RFP/Q submission package:

- Exhibit G – List of Relevant Reference Sources

Planning Professional Fee

The Planning Professional Base Fee will be approximately **\$300,000.00**. Anticipated Planning Professional service requirements include the services as listed in Item 3 below “Scope of Services”. The shortlisted Planning Professional firms are required to submit a fee proposal that also includes anticipated fees for any specialty consultants needed and all reimbursable expenses such as printing and travel in the Step II – Request for Proposals (RFP) phase.

Project Schedule

The Planning Professional's services are anticipated to commence by **November 2019** with construction documents anticipated for completion in **July 2020**.

2. PLANNING PROFESSIONAL SERVICES REQUIREMENTS

The Owner is seeking the services of a planning firm (the "Planning Professional") to provide all planning services, including the development of data, analysis, and recommendations. The successful Planning Professional will contract with the Owner in a timely manner. The applying firm shall be an individual firm fulfilling all contractual obligations and performing a minimum of 50% of the services in-house. An associated firm (if desired) may provide up to 50% services, allowing two or more firms to share in the effort on an equal basis.

3. SCOPE OF SERVICES

Georgia Tech seeks the assistance of a professional services firm with an integrated team of sub-consultants to provide comprehensive planning services for Georgia Tech student housing. GT is an urban campus located in and adjacent to Midtown Atlanta, primarily along the western edge of the I-75/85 interstate freeway. The Department of Housing manages 49 buildings in traditional, suite and apartment styles, and provides services for undergraduates, graduates and Family Housing. Housing inventory includes 19 traditional buildings with 2831 beds, and 30 apartment and suite buildings with 5511 upper class beds and 394 Family Housing beds. The Department of Housing is financially secure in providing a long-term plan for growth and operates a 10-year capital plan, constantly upgrading residence halls and buildings.

The Department of Housing has been consistently over 99% occupancy during Fall semesters and over 97% occupancy in Spring semesters. There is no mandatory residence requirement at this time. The competitive market in Midtown Atlanta and around the campus has added over 15,000 apartment beds over the last ten years. However, the Department of Housing continues to manage at a high level of occupancy and on-campus housing is a desired choice by the student population. The GT population consists of approximately 32,723 students (graduate and undergraduate) and 10,585 employees (faculty and staff).

Scope of Work

Project Goal

Provide Georgia Tech Department of Housing with guidelines on how to implement campus housing for the next five years.

The consultant should produce an update to the 2015 Student Housing Master Plan by providing the following information:

1. Task 1: Conduct current on-campus housing analysis (update to reflect renovations that have occurred since the Master Plan was completed)

- a. Existing Conditions
 - i. Rate structure
 - ii. Plan/unit configuration and total area
 - iii. Amenities provided
 - iv. Deferred Maintenance – ranking levels of needed MRR/improvements in three tiers
 - v. Greek Housing
- b. *Task 1 Deliverables*
 - i. On Campus Housing Analysis memo

2. **Task 2: Generate Market Analysis Update**
 - a. Current and future off-campus apartment market
 - i. Price point
 - ii. Rent structure
 - iii. Additional costs of living (utilities, fees, etc.)
 - iv. Plan type/configuration and total area (i.e. 2 bedroom, 2 bath, 1000 sf, etc.)
 - v. Amenities provided (including parking and access to transit)
 - vi. Proximity to campus & transit
 - b. *Task 2 Deliverables*
 - i. Market Analysis memo for Off-Campus Housing
3. **Task 3: Lead Focus Group Outreach**
 - a. Outreach will be used to develop guiding principles and goals and should include feedback from the following groups:
 - i. Faculty, Staff, Students
 - ii. Alumni
 - iii. Advisory Committee
 - iv. Working Group
 - v. Developers
 - b. *Task 3 Deliverables*
 - i. Focus Group Meeting summaries
4. **Task 4: Complete future on-campus housing analysis**
 - a. Traditional campus housing
 - b. Non-traditional campus housing
 - i. Faculty housing
 - ii. Young Alumni housing
 - iii. Graduate/family housing
 - iv. Micro housing
 - v. Guest housing
 - vi. Housing adjacent issues
 - i. ADA
 - ii. Gender inclusivity
 - iii. Living Learning Communities (LLCs)
 - c. *Task 4 Deliverables*
 - i. On-Campus Housing Analysis memo
5. **Task 5: Develop on-campus position vs off-campus market analysis**
 - a. Analysis should include the following elements:
 - i. Rent comparison
 - ii. Total cost of living comparison
 - iii. Safety comparison based on crime statistics
 - b. *Task 5 Deliverables*
 - i. On-campus vs. off-campus market memo
6. **Task 6: Complete projected impact of future development analysis**
 - a. Development Impact Analysis for the following properties:
 - i. 150 North Ave
 - ii. Tech Square Phase 3b/4
 - iii. Space occupied by Woodruff and adjacent area

- iv. Randall Brothers
 - b. *Task 6 Deliverables*
 - i. Future development analysis memo
- 7. Task 7: Complete a Campus Survey to assess desires and needs of campus members**
 - a. Survey should have 3 parts:
 - i. Need assessment survey for faculty
 - ii. Need assessment survey for staff
 - iii. Needs and satisfaction survey for students
 - b. *Task 7 Deliverables*
 - i. Survey data analysis
 - ii. Survey results memo
- 8. Task 8: Develop 5-year Housing Projections**
 - a. Consultant will develop 10-year projections for on-campus housing demand
 - b. *Task 8 Deliverables*
 - i. Projections Overview Memo
- 9. Task 9: Cultivate Benchmark research**
 - a. Peer institutions
 - b. Student Housing Leaders
 - c. *Task 9 Deliverables*
 - i. Benchmark research memo
- 10. Task 10: Develop Final Recommendations**
 - a. Based on the previous tasks, the consultant will be able to provide recommendations on the following:
 - i. Housing principles & goals for the future
 - ii. Potential Development sites
 - iii. Remaining Competitive
 - iv. Financial considerations
 - v. New housing offering types
 - vi. Priority list for new resident construction
 - vii. Priority list for renovations
 - b. *Task 10 Deliverables*
 - i. Recommendations summary memo

The update will include coordination with multiple GT campus users including but not limited to Campus Services, the Department of Housing, Facilities Management Design & Construction, Capital Planning & Space Management, Sustainability, Parking & Transportation, Office of Undergraduate Education, Admissions and Enrollment Services, Office of Graduate Education, Georgia Tech Dining, and Environmental Health & Safety. The design team will need to respond to the goals outlined in the Campus Strategic Plan, Campus Master Plan, Campus Landscape Master Plan, South Central Master Plan, EBB Sector Plan, Campus Bike Master Plan, Campus Sustainability Plan, Stormwater Master Plan, Historic Presentation Plan, & Yellow Book Design Standards as appropriate (See Section 3 – Resources and Guidelines). In addition, the update will need to incorporate the current planning efforts of Tech Square Phase 3.

4. QUALIFICATIONS REVIEW PROCESS

Selection of the Planning Professional will be a multi-step process generally following the steps outlined in the State Construction Manual.

Step I - Qualifications Review, is initiated with this RFQ for the purpose of acquiring Statements of Qualifications from prospective firms. A selection of finalist firms will be made by a Selection Committee consisting of representatives of Georgia Tech. The Selection Committee will receive and review Statements of Qualifications submitted in response to this RFQ and then evaluate the submittals based on the criteria for evaluation listed below:

Criteria for Evaluation of Statements of Qualifications

25% Factor: Stability of the firm, including the firm’s corporate history, growth, resources, continuity of team, familiarity with the Atlanta market, form of ownership, litigation history, financial information, and other evidence of stability.

45% Factor: Firm’s relevant project team experience and qualifications, including the demonstrated ability of firm in effective campus housing planning projects comparable in complexity, size, and function, for Owners such as the State of Georgia and other similarly-structured organizations. This includes relevant experience and qualifications of the principal Planning Professional(s) and lead staff, and evidence of relevant competencies for this project. We expect the team to effectively plan for a timeline of (10) years factoring in developmental pressures, changing landscape, existing conditions, and financial constraints on behalf of the Georgia Tech community.

30% Factor: Firm’s apparent suitability to provide services for project, including past performance and firm’s apparent fit to the project type and/or needs of the Owner, performance on past work and any special or unique qualifications for the project, current and projected workloads, the proximity of office to project location, and services offered by the firm. The firm’s non-discrimination policies, any affirmative action policies and/or stated efforts for the inclusion of Minority-Owned Business Enterprises and/or Woman-Owned Business Enterprises will be a part of this evaluation. Experience and proficiency with the design of public buildings with regard to the areas of public safety and health, accessibility for persons with disabilities and special needs, and environmental concerns will be considered.

5. SCHEDULE OF EVENTS (STEP I)

The following Schedule of Events represents the Owner’s best estimate of the schedule that will be followed. All times indicated are prevailing times in Atlanta, Georgia. The Owner reserves the right to adjust the schedule as the Owner deems necessary.

STEP I (RFQ) Estimated Time Line		
a. Owner issues public advertisement of RFQ	No Later Than 7/19/19	----
b. Deadline for written questions/requests for clarification (see Section 6).	7/31/19	2:00pm
c. Owner issues final addendum (if necessary)	8/13/19	----
d. Deadline for submission of Statements of Qualifications	8/20/19	2:00pm
e. Owner completes evaluation, post results, and issues notification to finalist firms	No later than 8/30/19	----

6. SUBMITTAL OF QUESTIONS AND REQUESTS FOR CLARIFICATION

It is the responsibility of each respondent to examine the entire RFQ, seek clarification in writing, and review its submittal for accuracy before submitting the document. Once the submittal deadline has passed, all submissions will be final. The Owner will not request clarification from individual proposer regarding their submission, but reserves the right to ask for additional information from all parties who have submitted qualifications. Questions about any aspect of the RFQ, or the project, shall be submitted in writing via e-mail to:

Brad Morris
Capital Projects Director, Campus Services
Georgia Institute of Technology
brad.morris@aux.gatech.edu
Phone Calls Will Not Receive A Response

The deadline for submission of questions relating to the RFQ is the time and date shown in the Schedule of Events (Section 5). All relevant questions and requests for clarification received by the Institution in writing, prior to the deadline will be compiled, and answers will be posted on the Georgia Procurement Registry as an addendum/notice to the original solicitation for services at <http://ssl.doas.state.ga.us/PRSapp/>. Any proposer exceptions to the RFP requirements or requests for proposal deadline extensions must include the reason(s) for such a request. The Owner reserves the right to approve or reject such requests as the Owner deems necessary.

7. INSTRUCTIONS FOR PREPARING STATEMENTS OF QUALIFICATIONS

Submittals must be prepared in a manner that fits a standard 8 ½" x 11" paper format when printed. Responses are limited to using a minimum of an 11-point font. **The entire response shall not exceed 50 pages, including exhibits, affidavits or other enclosure information that may be included in an appendix.** All pages count regardless of content. Submittals that include qualifications of more than one firm shall not exceed page limits. Submittals that exceed the page limit will be deemed non-responsive and will not be considered by the Selection Committee.

STATEMENT OF QUALIFICATIONS (DELIVERABLES "A", "B" and "C" FOR ALL FIRMS)

Emphasis should be on completeness, relevance, and clarity to content. The content of all Statement of Qualifications must be categorized and numbered as outlined below, and responsive to all requested information.

A. Description and Resources of Firm

- A1 Provide basic company information: Company's legal name, address, name of primary contact, telephone number, fax number, email address, and company website (if available). If the firm has multiple offices, the qualification statement shall include information about the parent company and branch office separately. Identify office from which project will be managed and this office's proximity to the project site. If applicable, indicate the year the local office was established and the number of persons staffing that office and their disciplines. Provide form of ownership, including state of residency or incorporation, and number of years in business. Is the offeror a sole proprietorship, partnership, corporation, Limited Liability Corporation (LLC), or other structure?
- A2 Briefly describe the history and growth of your firm(s). Provide general information about the firm's personnel resources, including disciplines and numbers of employees and locations and staffing of offices.

- A3 Has the firm been involved in any litigation in the past five (5) years? Describe your experience with litigation with Owners and/or Contractors. List any active or pending litigation and explain. List any claims against your firm or against Owners where your firm is named.
- A4 Provide the name of the insurance carrier, types of coverage and deductible amounts per claim.
- A5 List the firm's annual revenue for the past 5 years. List the parent office and the local office revenues separately, if applicable.
- A6 Supply financial references and main banking references.
- A7 Has the firm ever been removed from a design services contract or failed to complete a contract as assigned? If yes, provide an explanation.
- A8 Complete and submit the Certification Form (Exhibit "A" provided with RFQ) and provide a scanned notarized copy with response with the firm's Statement of Qualifications.
- A9 Complete and submit a Certificate of Insurance and Minority Status Form (Exhibit "B" provided with RFQ) and provide a scanned notarized copy with response with the firm's Statement of Qualifications.
- A10 Complete and submit the Project Team Composition Form, including subconsultants (Exhibit "C" provided with RFQ). This is to identify composition of the project team only. More detailed information about the consulting team members and relevant project experience will be requested in Step II, Request for Proposals (RFP).
- A11 Complete the Contractor Affidavit Form (Exhibit "E" provided with RFQ) and provide a scanned notarized copy with response with the firm's Statement of Qualifications in compliance with the Georgia Security and Immigration Compliance Act.
- A12 Complete the Proposer's Disclosure Statement (Exhibit "F" provided with RFQ) and include with firm's Statement of Qualifications.

GEORGIA SECURITY AND IMMIGRATION COMPLIANCE ACT AFFIDAVIT(S)

"Contractor" in the following Affidavits shall mean "Planning Professional" for the purpose of compliance with O.C.G.A. § 13-10-91, (b).

For the purpose of completing the attached Affidavits, please insert the following:

- "Name of Public Employer" shall mean "Georgia Institute of Technology."
- "Name of Project" shall mean "Housing Master Plan, 2019-0463"

B. Experience and Qualifications

- B1 Provide professional qualifications and description of experience for principal consulting personnel. *(At this stage, firms are asked for information on lead staff only, but may list qualifications and experience on more than one lead individual who is qualified and available for proposed project. If the firm is selected as a finalist, the Owner will request detailed information on the exact proposed expanded team and their relevant experience during the RFP process.)*
- B2 Provide information on the firm's experience on projects of similar type, size, function, and complexity. Describe no more than five (5) and no less than three (3) projects, in order of most relevant to least relevant, which demonstrate the firm's capabilities to perform the project at hand. For each project, the following information should be provided:
 - a. Project name, location and dates during which services were performed.
 - b. Brief description.
 - c. Services performed by your firm.
 - d. If your firm has more than one office, indicate which office was responsible for each of the example projects.
 - e. Respective Owner's stated satisfaction in service of your firm. Provide any Owner-written letters of reference/recommendation about the firm's performance on the project.
 - f. Owner's current contact information.

- g. Include key personnel participation in example projects, using a summary matrix similar to Standard Form 330 (Rev. 8/20/16) page 4.

C. Statement of Suitability

- C1 Provide any information that may serve to differentiate the firm from other firms in suitability for the project. Provide evidence of the firm’s fit to the project and/or needs of the Owner, any special or unique qualifications for the project; Provide current and projected workloads, the proximity of office to project location, and any services offered by the firm that may be particularly suitable for this project.
- C2 Provide Minority-Owned Business Enterprise (MBE) / Woman-Owned Business Enterprise (WBE) status and M/WBE participation on this project, as well as any non-discrimination and affirmative action policies of the firm. Provide evidence of experience and proficiency with design of public buildings with regard to the areas of public safety, environmental, accessibility for persons with disabilities and special needs or other related concerns.
- C3 Provide information on any special services offered by the firm that may be relevant and available for this project.

8. SUBMITTAL OF STATEMENTS OF QUALIFICATIONS

Submit three (3) hard copies and one (1) electronic copy (.pdf via USB flash drive) of the complete package to the Owner. All copies of the proposal must be submitted in a sealed, opaque envelope or box, and reference to the Housing Master Plan must be indicated on the outside of all of the envelopes or boxes. The entire submittal should be submitted as one (1) file. Please do not submit individual documents or sections separately. Copies should be submitted to:

Brad Morris
Georgia Institute of Technology
Facilities Design and Construction
151 6th Street, NW (O’Keefe Building, 3rd Floor)
Atlanta, Georgia 30332-0351

Statements of Qualifications must be received by the Owner prior to the deadline indicated in the Schedule of Events (Section 5 of the RFQ).

It is the sole responsibility of the Proposer to assure delivery by the specified deadlines; the Owner cannot accept responsibility for incorrect delivery, regardless of reason. No submittals will be accepted after the time stipulated above. Submittals will not be accepted via e-mail or fax.

Proposers are further reminded to include a completed CONTRACTOR AFFIDAVIT UNDER O.C.G.A. §13-10-91 (b)(1) with the Statement of Qualifications (See Exhibit “E”). **FAILURE TO PROVIDE THIS AFFIDAVIT WILL RESULT IN REJECTION OF PROPOSAL.**

All expenses for preparing and submitting responses are the sole cost of the party submitting the response. The Owner is not obligated to any party to reimburse such expenses. All submittals upon receipt become the property of the Owner. Labeling information provided in submittals “proprietary” or “confidential” or any other designation of restricted use will not protect the information from public view. Subject to the provisions of the Open Records Act, the details of the proposal documents will remain confidential until final award.

9. FINALIST NOTIFICATION

Once the Selection Committee has completed the evaluation of the Statements of Qualifications, a list of the finalist firms will be posted on the Georgia Procurement Registry as an addendum/notice to the original RFQ solicitation.

Step II – Planning Professional (PP) Selection, will be initiated by invitation to finalists to submit Planning Professional Proposals as instructed in the Owner’s Request for Proposals (RFP). Finalists will be those firms determined by the Selection Committee to be especially qualified to perform as the Planning Professional for this Project in accordance with the qualification criteria herein. The Owner will issue a notice to finalists to participate in an oral presentation/interview. The successful Planning Professional will be determined from the interviews and proposals received.



STEP II
REQUEST FOR PROPOSALS
(From Pre-Qualified Finalists ONLY)
For
Planning Professional Services
For
Housing Master Plan
Project No. 0463-2019 / Bid-Contract No. 0011-20PQ

Georgia Institute of Technology, Atlanta, Georgia

Note: The information in this Section, Step II (Request for Proposals) is provided for firms who have been issued notification as having been deemed eligible and are shortlisted for the project.

To firms who have been issued notification as having been deemed eligible, the Georgia Institute of Technology (“User”), issues this Request for Proposals (RFP), for those firms to offer proposals for planning professional services for the specific project.

1. CONTRACT INFORMATION

The contract for Housing Master Plan professional services will be based on the General Consultant contract included with this RFQ/P. You are encouraged to review and become familiar with the terms and conditions of this contract. ***Owner does not intend to modify any language contained in general terms and conditions of the contract, and any significant exceptions proposed by a firm could lead to a firm being deemed non-responsive.***

2. BUILDING PROGRAM

See General Project Information in RFQ (Step I), Section 1.

3. SCHEDULE OF EVENTS (STEP II)

The following Schedule of Events represents the Owner’s best estimate of the schedule that will be followed. All times indicated are prevailing times in Atlanta. The Owner reserves the right to adjust the schedule as the Owner deems necessary.

STEP II (RFP) Estimated Time Line		
a. Owner issues notice to finalist firms to propose as instructed in RFP	No Later Than 8/30/19	----
b. Owner conducts Mandatory Pre-Proposal Site Visit for finalists	N/A	----
c. Deadline for submission of written questions and requests for clarification	9/9/19	2:00 PM
d. Owner issues final addendum (if necessary)	No later than 9/16/19	-----

e. Deadline for submission of Design Team Proposals	9/23/19	2:00 PM
f. Owner interviews finalist firms and Fee Proposals are due	9/30/19	TBA

4. PRE-PROPOSAL SITE VISIT

The Owner will **NOT** conduct a mandatory pre-proposal site visit to support this solicitation.

5. SELECTION PROCESS

Step II – Planning Professional (PP) Selection, will be initiated by the invitation to the qualified finalists by the Selection Committee (determined in Step I from evaluation of Statements of Qualifications) to submit **Planning Team Proposals and Fee Proposals** as instructed in this RFP. Finalist interviews will also be conducted by the Owner. The successful PP will be determined from the evaluation of proposals received and interviews.

Criteria for the Evaluation of Project Proposals:

15% Factor: Previous Performance and References of the firm including level of quality of the services of the firm to previous customers, customer’s statements of that quality, the firm’s ability to meet established time requirements, the firm’s response to project needs during design and construction, the firm’s control of design schedule, quality and budget. The Owner will use references from stakeholders of the Owner’s choosing from previous projects of the finalists, among other information as necessary. This information will be collected by the Selection Committee from project references provided in the RFQ (Step I) submittal.

20% Factor: Planning Team Qualifications and Experience of the Proposed Project Team. Experience of the principal, lead designer, and project manager on completed projects of similar size, type, and complexity; assigned team’s experience with effective budget and schedule control; availability of the proposed team for this project. Provide information regarding percentage of the primary team member’s time will be committed to this project.

15% Factor: Quality of Proposed Management Plan: The firm’s design and detailed work plans; Firm’s approach for managing responsibility and accountability for project concerns; Firm’s process for effectively resolving issues and maintaining project commitments.

Criteria for the Evaluation of Finalist Interviews:

25% Factor: Methodology Presented: The firm’s ability to assure success to complete the project within the time and cost budgeted. The firm’s presentation of the proposed execution plan, and the committee’s overall impression of the firm and key team members (lead planner, project manager, project director, project executive, etc.)

25% Factor: Team Communications/Project Solutions: The effectiveness in communication of the team members during the interview process, and the firm’s ability to effectively answer project questions and provide solutions during the interview.

6. SUBMITTAL OF QUESTIONS AND REQUESTS FOR CLARIFICATION

It is the responsibility of each respondent to examine the entire RFP, seek clarification in writing, and review its submittal for accuracy before submitting the document. Once the submittal deadline has

passed, all submissions will be final. The Owner will not request clarification from individual respondents relative to their submission, but reserves the right to ask for additional information from all parties who have submitted qualifications. Questions about any aspect of the RFP, or the project, shall be submitted in writing via e-mail to:

Brad Morris
Capital Projects Director, Campus Services
Georgia Institute of Technology
brad.morris@aux.gatech.edu
Phone Calls Will Not Receive A Response

The deadline for submission of questions relating to the RFP is the time and date shown in the *Schedule of Events (Section 3)*. All relevant questions and requests for clarification received by the Institution in writing, prior to the deadline will be compiled, and answers will be posted on the Georgia Procurement Registry as an addendum or notice to the original solicitation for services at <http://ssl.doas.state.ga.us/PRSapp/>. Any proposer exceptions to the RFP requirements or requests for proposal deadline extensions must include the reason(s) for such a request. The Owner reserves the right to approve or reject such requests as the Owner deems necessary.

7. INSTRUCTIONS FOR PREPARING DESIGN TEAM PROPOSALS

READ CAREFULLY - THIS HAS CHANGED!

Design Team Proposals must be prepared in a manner that when printed would typically fit on standard (8 ½ x 11") paper. Proposal responses **should not exceed 40 pages** and use a minimum 11-point font. Submittals that include qualifications of more than one firm shall not exceed the page limit. All cover sheets, tabs, table of contents, or other enclosure information required count towards the page limit. All pages count regardless of content. . Exhibits A through F do not count against the page limit. Emphasis should be on completeness, relevance, and clarity of content.

To expedite the review of submittals, it is essential that respondents follow the format and instructions outlined below. The content of all Project Proposals must be categorized and numbered as outlined in the following "PLANNING TEAM PROPOSAL DELIVERABLES", and must address in a responsible and responsive manner all requested information:

PLANNING TEAM PROPOSAL (DELIVERABLES "D", and "E" FOR FINALIST FIRMS ONLY)

Emphasis should be on completeness, relevance, and clarity to content. The content of all Statement of Qualifications must be categorized and numbered as outlined below, and responsive to all requested information.

D. Qualifications and Experience of Proposed Planning Team

- D1 Describe your firm's proposed organization for the planning team, including sub-consultants. Please designate all specific individuals and their roles on your team by submitting an organizational chart for the project: At a minimum, the project organization chart shall show the names of key planners and staff; descriptions of responsibilities for all proposed staff.
- D2 Please provide for each of the above personnel current resumes listing relevant project experience and percentage of the person's time to be committed to this project.
- D3 Please identify the individual who, *from project start to finish*, will be the leader of your team and the principal point of contact between your firm and the BOR and the Using Agency. Provide detailed information on the qualifications of this individual and the direction, authority, and management tools that will be provided to the individual by the firm. This

individual's competence, his/her leadership, and his/her ability to achieve *customer satisfaction* will be heavily considered in the selection.

- D4 Provide examples of your team's *recent* experience in similar projects, including the following information:
- a. Provide detailed information on the three most recent relevant projects your firm has completed with proposed team members working together. Include the total value of the project, dates of the project, quantity of change orders or amendments to the contract and net total cost increase. Summarize the actual schedule performance relative to the initial project schedule. For each project, provide the name of Client's representative (with a current phone number) who is most familiar with your performance on the project. Summarize successes achieved and problems encountered with the project.
 - b. Provide a reference from the Client and any other stakeholders (with current phone numbers) familiar with your performance on each of the above projects.
 - c. List the individuals who served as the Principal Planner, architect, and other key roles on the projects. Please note whether these individuals are still employed with your firm. Identify and provide detailed information on projects in which all or any combination of members of the proposed team has worked together on.

E. Housing Master Plan

- E1 Provide a statement of your definition of your firm's proposed overall role in this project, your anticipated level of management responsibility and accountability for project concerns. Describe your process for efficiently resolving issues and maintaining the project commitments while working collaboratively with the BOR, Using Agency, and others as applicable. Provide detailed procedures for routine solving of complex project issues without compromising your team commitments. Provide your proposed methods and plans of communication.
- E2 Provide your proposed timeline covering the scope of work and a detailed work plan for the project. Each milestone must include the detailed steps describing the tasks to be done. Describe systems and procedures your firm uses to manage the design schedule. Describe alternatives that may be explored to shorten the schedule.
- E3 Provide your detailed plan for applying any services not specifically mentioned herein. Explain the relevance of these services to this project and how they benefit the project.

8. SUBMITTAL OF DESIGN TEAM PROPOSALS

Submit three (3) hard copies and one (1) electronic copy (.pdf via USB flash drive) of the complete package to the Owner. All copies of the proposal must be submitted in a sealed, opaque envelope or box, and reference to the Housing Master Plan must be indicated on the outside of all of the envelopes or boxes. The entire submittal should be submitted as one (1) file. Please do not submit individual documents or sections separately. Copies should be submitted to:

Brad Morris
Georgia Institute of Technology
Facilities Design and Construction
151 6th Street, NW (O'Keefe Building, 3rd Floor)
Atlanta, Georgia 30332-0351

Statements of Qualifications must be received by the Owner prior to the deadline indicated in the Schedule of Events (Section 5 of the RFQ).

It is the sole responsibility of the Proposer to assure delivery by the specified deadlines; the Owner cannot accept responsibility for incorrect delivery, regardless of reason. No submittals will be accepted after the time stipulated above. Submittals will not be accepted via e-mail or fax.

Proposers are further reminded to include a completed CONTRACTOR AFFIDAVIT UNDER O.C.G.A. §13-10-91 (b)(1) with the Statement of Qualifications (See Exhibit “E”). FAILURE TO PROVIDE THIS AFFIDAVIT WILL RESULT IN REJECTION OF PROPOSAL.

All expenses for preparing and submitting responses are the sole cost of the party submitting the response. The Owner is not obligated to any party to reimburse such expenses. All submittals upon receipt become the property of the Owner. Labeling information provided in submittals “proprietary” or “confidential” or any other designation of restricted use will not protect the information from public view. Subject to the provisions of the Open Records Act, the details of the proposal documents will remain confidential until final award.

9. PRESENTATION/ INTERVIEW INFORMATION

Interview Format

Firms selected to make presentations shall be notified by the Invitation to Interview letter issued by the Selection Committee Manager. The Invitation to Interview letter shall designate a place and time for the interview session. The time allotted to each firm to present and be interviewed will be in accordance with the State Construction Manual. The Invitation letter will specify the manner in which the presentations will be conducted.

- The interview will last a total of 60 minutes (5 minutes for setup, 35 minutes for the presentation, 15 minutes reserved for questions and answers and the last 5 minutes for knock down). The Selection Committee will consist of representatives of the institution.
- Electronic presentations, such as PowerPoint presentations are also allowed.
- GT will typically have a screen and projector available in the interview room, and possibly a laptop computer. Nevertheless, presenters must be prepared with their own projector, flash drive and laptop computer in case unforeseen technical difficulties are encountered.
- The presentation may involve flip charts or boards along with the oral presentation.
- All members of the Selection Committee will be present during all of the presentations and interviews.
- Firms are not allowed to address any questions, prior to the interview, to anyone other than the designated contact.

Interview Requirements

The primary intent of the formal interview process is to provide the Selection Committee with in-depth and clarifying information about the firm. Information provided should assist the Selection Committee in making an informed decision as to the proposer best suited for the work.

Teams should focus their presentations on:

- Describing their detailed plan for designing and administering the construction, schedule, and quality on the project; and
- Unique characteristics or services the team offers
- Specific roles of your team members

Teams are discouraged from reviewing general company history and past experience as submitted in Statements of Qualifications or Project Proposals unless this information is particularly relevant to the presentation. All key personnel should be present at the interview to discuss how the team will successfully complete the project.

10. SUBMITTAL OF FEE PROPOSALS

Fee Proposals will be solicited from the finalists invited to interview. Fee proposals shall be submitted at the conclusion of the interview session in a sealed opaque envelope and shall not include any project proposal information. **Firms must use “Planning Professional Fee Proposal” form (included as an Exhibit to this RFQ/RFP).** No sealed fee proposal will be opened until one firm has been judged to be the top ranked firm. Subsequently, only the fee proposal from that top ranked firm will be opened. Please understand that this proposal constitutes a starting point for negotiation toward an eventual agreement on fees.

Final Selection

Upon completion of the evaluation and interview process by the Selection Committee, the firms will be ranked in descending order of recommendation. Negotiations will then be initiated with the best-qualified firm to finalize the terms and conditions of the contract. In the event a satisfactory fee agreement cannot be reached with the highest ranking firm, the Owner will formally terminate the negotiations in writing and enter into negotiations in turn with the second highest ranking firm and so on until a mutual agreement is established and the Owner awards an architectural services contract.

11. ADDITIONAL TERMS AND CONDITIONS

Deadlines

The deadline for submission of questions relative to the RFP/RFQ is the time and date shown in the Schedule of Events (Section 3). All relevant and significant questions that have been submitted in writing prior to the deadline will be compiled and answered in writing, and issued directly to all proposers via E-mail. Any proposer exceptions to the RFP/RFQ requirements or requests for deadline extensions must also be communicated to the Owner by the deadline to be properly considered. Any requests for proposal deadline extensions must include the reason(s) for such a request. The Owner reserves the right to approve or reject such requests as the Owner deems necessary.

Restriction of Communication

From the issue date of this (RFP/RFQ) solicitation until a successful proposer is selected and the selection is announced, proposers are not allowed to communicate about this solicitation or this Project for any reason with any members of the Selection Committee, the Institution, or BOR, except for submission of questions as instructed in the RFQ, or during the proposer's conference (if applicable), or as provided by any existing work agreement(s). For violation of this provision, the Owner reserves the right to reject the proposal of the offending proposer.

Submittal Costs and Confidentiality

All expenses for preparing and submitting responses are the sole cost of the party submitting the response. The Owner is not obligated to any party to reimburse such expenses. All submittals upon receipt become the property of the Owner. Labeling information provided in submittals “proprietary” or “confidential”, or any other designation of restricted use will not protect the information from public view. Subject to the provisions of the Open Records Act, the details of the proposal documents will remain confidential until final award.

Award Conditions

This request is not an offer to contract or a solicitation of bids. This request and any statement of qualifications or proposal submitted in response, regardless of whether the proposal is determined to be the best proposal, is not binding upon the Owner and does not obligate the Owner to procure or contract for any services. Neither the Owner nor any party submitting a response will be bound unless and until a written contract mutually accepted by both parties is negotiated as to its terms and conditions and is signed by the Owner and a party containing such terms and conditions as are negotiated between those parties. The Owner reserves the right to waive non-compliance with any requirements of this Request for Proposal and to reject any or all proposals submitted in

responses. Upon receipt and review of responses, the Owner will determine the party(s) and proposal that in the sole judgment of the Owner is in the best interest of the Owner (if any is so determined), with respect to the evaluation criteria stated herein. The Owner then intends to conduct negotiations with such party(s) to determine if a mutually acceptable contract may be reached.

Reciprocal Preference Law

For the purposes of evaluation only, a proposer that resides in the State of Georgia will be granted the same preference over proposers that reside in another State in the same manner, on the same basis, and to the same extent that preference is granted in awarding bids for the same goods or services by such other State to proposers that reside therein. For the purposes of this law, the definition of a resident proposer is one who maintains a place of business with at least one employee inside the State of Georgia. A P.O. Box address will not satisfy this requirement.

Joint-Venture Proposals

The Owner does not desire to enter into “joint-venture” agreements with multiple firms. In the event two or more firms desire to “team up” it is strongly recommended that one incorporated firm propose and maintain status as the contracted lead firm with the remaining firms participating as major consultants to the lead firm.

Minority and Small Business Enterprise

It is the policy of the State of Georgia that minority-owned business enterprises (MBE), woman-owned business enterprises (WBE) and small business enterprises (SBE), have a fair and equal opportunity to participate in the State purchasing process. Therefore, the Owner encourages all MBE, WBE and SBE to compete for contracts to provide goods, services, and construction, and encourages contractors to solicit MBE, WBE and SBE in procuring subcontractors and suppliers. This desire on the part of the Owner is not intended to restrict or limit competitive bidding or to increase the cost of the work. The Owner supports a healthy free market system that seeks to include responsible businesses and provides ample opportunity for business growth and development. Contractors and subcontractors who utilize qualified minority subcontractors may qualify for a Georgia state income tax credits for qualified payments made to minority subcontractors. See Official Code of Georgia Annotated (O.C.G.A.) O.C.G.A. Section 48-7-38. For more information, please contact:

The Governor's Entrepreneur and Small Business Office
75 Fifth Street, Suite 825
Atlanta, Georgia 30308
Phone: 404-962-4071
<http://www.georgia.org/Business/SmallBusiness/>

Statement of Agreement

With submission of a proposal, the Proposer agrees that he/she has carefully examined the Request for Qualifications (RFQ), and the Proposer agrees that it is the Proposer's responsibility to request clarification on any issues in any section of the RFQ with which the Proposer disagrees or needs clarified. The Proposer also understands that failure to mention these items in the proposal will be interpreted to mean that the Proposer is in full agreement with the terms, conditions, specifications and requirements in the therein.

EXHIBIT G

Website Links for Master Planning and Related Documents

- **2004 Campus Master Plan** <http://www.space.gatech.edu/campus-master-plan>
- **2015 Housing Master Plan**
http://space.gatech.edu/sites/default/files/images/Housing_Master_Plan_2015_Report_Final_2_04_1616.pdf
- **2009 Housing Master Plan**
http://www.space.gatech.edu/sites/default/files/images/housing_master_plan_2009.pdf
- **Sector Plans** <http://www.space.gatech.edu/capital-planning/sector-plansfeasibility-study>
- **2013 Stormwater Master Plan** <http://www.space.gatech.edu/capital-planning/sector-plansfeasibility-study>
- **2010 Landscape Master Plan** <http://www.space.gatech.edu/landscape-master-plan>
- **Sustainability Plan** <http://www.sustain.gatech.edu/>
- **2010 Strategic Plan** <https://www.gatech.edu/about/strategic-plan>
- **2013 Bike Master Plan** <http://www.space.gatech.edu/bicycle-master-plan>
- **2009 Historic Preservation Plan** <http://www.space.gatech.edu/bicycle-master-plan>
- **Standards for Design and Construction** <http://www.facilities.gatech.edu/standards-forms>