Request for Proposal

Integrated Space Planning Consulting Services

July 13, 2015

A VASCUPP Member Institution
Issued by
Procurement and Supplier Diversity Services
Charlottesville, Virginia
A. GENERAL INFORMATION

Request for Proposal (RFP) Name: Integrated Space Planning Consulting Services

RFP Number: LP071315

Issue Date: July 13, 2015

Brief Description: The University of Virginia is seeking a selected firm(s) to provide consulting services in the development of a comprehensive, integrated space plan for the School of Medicine and the University Health System.

Preproposal Questions: Any questions concerning this RFP must be sent to the buyer listed below no later than 3:00 p.m., EDT Tuesday July 21, 2015 in order to guarantee a timely response prior to the proposal due date.

Proposal Due Date: 3:00 p.m., EDT Tuesday July 28, 2015. Firms must submit an electronic original proposal that will be received by the University by the proposal deadline. The electronic original proposal must be submitted via electronic mail to pur-rfp@virginia.edu. In addition to the electronic original proposal, firms must also provide eight hard copies of the original proposal in individual, bound volumes that will be received by the University by the proposal deadline. Each hard copy of the proposal must be accompanied by an electronic copy of the proposal on a thumb drive or CD-ROM. All electronic proposal documents, whether originals or copies, should be formatted as Microsoft Word documents.

Any trade secrets or proprietary information submitted with a proposal (original or copy) for which the firm seeks protection from public disclosure must be clearly identified by the specific page and section number in the proposal and accompanied by a suitable justification requesting non-disclosure.

Presentations/Negotiations: Presentations/Negotiations will be held the week of August 24, 2015.

Expected Award Date: October 15, 2015

Term of Agreement: The term of a resulting Agreement or Purchase Order will be for five years, with the ability to renew on the same or similar terms and conditions, for two additional one-year periods if mutually agreeable to the University and the Selected Firm. The Selected Firm and the University will mutually agree at least 180 days prior to each renewal period whether to renew the terms of the Agreement.

REFER ALL QUESTIONS TO THE ISSUING OFFICE:

UNIVERSITY OF VIRGINIA
Department of Procurement and Supplier Diversity Services
1001 North Emmet St, Carruthers Hall
P.O. Box 400202
Charlottesville, VA 22904-4202
Attention: Lori Ponton, Senior Buyer
Phone: 434-924-4216
Fax: 434-982-2690
Email: lp3s@virginia.edu

NOTE 1: If RFP proposal is sent U.S. Postal Service, use the P. O. Box. The University does not take responsibility for lost or misdirected mail.

NOTE 2: During the RFP process, all communication must be directed to the buyer listed above, with the exception of issues directly related to SWAM business and SWAM subcontracting opportunities. Such SWAM issues may be alternately directed to Les Haughton, Director Supplier Diversity, at (434) 924-7174 or SWAM@virginia.edu. Any failure to adhere to this requirement may result in the rejection of the firm’s proposal or cancellation of the RFP.
this web site:  http://www.procurement.virginia.edu/pagerfp. It is the firm’s responsibility to ensure that the latest version of the entire RFP and related links are reviewed prior to submission of a proposal. We encourage you to check the web site frequently for any changes prior to the due date. Call (434) 924-1346 if you have trouble accessing the RFP from the web. For questions about the content of the RFP, contact the buyer listed above. Additional information can be found on Procurement and Supplier Diversity Services web site: http://www.procurement.virginia.edu.

This RFP is part of a competitive procurement process which helps to serve the University's best interests. It also provides firms with a fair opportunity for their services to be considered. The process of competitive negotiation being used in this case should not be confused with the different process of competitive sealed bidding. The latter process is usually used where the goods or services being procured can be described precisely and price is generally the determinative factor. With competitive negotiation, however, price is not required to be the determinative factor, although it may be, and the University has the flexibility it needs to negotiate with firms to arrive at a mutually agreeable relationship.

For ease of reference, each firm or individual receiving this RFP is referred to as a “firm” and the firm or individual selected to provide services for the University is referred to as the “Selected Firm.” This RFP states the instructions for submitting proposals and the procedure and criteria by which a firm may be selected.

**B. BACKGROUND AND SCOPE OF SERVICES**

**University Background**
When Thomas Jefferson founded the University in 1819, he intended it to be nothing less than a world-class institution of higher learning. Jefferson’s spirit lives on – not only in the Rotunda and Academical Village he designed, and which remain treasures of American architecture, but in the University’s standing as a leader in education, research, and community service.

The 24,000 plus students attending the University work within a true meritocracy and live by an Honor Code unique among American universities. Each student is exposed to the widest spectrum of disciplines – from arts and athletics to humanities and technology. Our students also enjoy a unique connection to the world beyond college through the University’s outstanding professional training, exemplified by its nationally ranked schools of Law, Business, and Medicine. The University as a whole has had a consistently high ranking not only among public schools, where it often heads the list, but among all American universities, public and private.

Over 12,400 permanent University faculty and staff are committed to serving both the local and national community. The University makes a real difference in the world, through its invaluable research, a hospital ranked among the nation’s finest, and graduates who have consistently been among the forefront of our nation’s shapers. At the University, our bright future is the direct result of our great history.

**School of Medicine Background**
The School of Medicine (“SOM”) has a long tradition of excellence in a collaborative atmosphere within the school, and within a health system that also includes the University Physicians Group (UPG), the School of Nursing, the University Medical Center, and the Health Sciences Library (collectively
“University Health System”). It is one of the largest schools within the University, with approximately 1,100 salaried faculty, 1,000 visiting faculty and 1,500 staff. SOM consists of 21 clinical departments, eight basic science departments, 16 research centers and a major research library.

In the last few years, the SOM, the University Health System, and the University have experienced – and are still undergoing – significant change. Some of this change is due to external factors such as the decline in NIH funding, sequestration, the Affordable Care Act, increased competition from local and regional healthcare providers, and the increase in the number of Virginia-based medical schools.

Other changes are internal. In 2011, the Medical Center, in collaboration with the SOM and the UPG, undertook a planning effort to define a strategic vision focused on clinical operations and investments in clinical and translational research “Centers of Excellence.” In 2012, the University’s President announced that the VP/Dean of the SOM and the VP/CEO of the Medical Center would no longer hold the title of Vice President, and both positions would report to the newly created position of Executive Vice President for Health Affairs (“EVP-HA”). Currently, both the EVP-HA and the new SOM Dean have been hired.

The SOM implemented a new nationally recognized undergraduate medical curriculum in 2010 and a new graduate program curriculum in 2012. The SOM has completed its October 2014 reaccreditation visit, and is successfully reaccredited.

The SOM undertook a comprehensive strategic planning process in 2002, which resulted in The Decade Plan. Currently the SOM has charged a task force to review faculty compensation practices and clinical faculty benefits. A task force will review the SOM’s time away policy for faculty and provide recommendations to the dean. The SOM and its department leadership are discussing how to balance financial restrictions with requests to hire new and replacement investigators. While there has been clinically focused joint planning with the Medical Center and UPG, the SOM needed to engage in an integrated strategic planning process that includes the education and research missions. In 2014, the SOM hired Navigant Consulting to guide and develop an academic strategic plan. The first phases of implementation began in late 2014 and will continue through 2015. The SOM now needs to engage in an integrated space plan with the Health System partners to fully support initiatives identified in the SOM academic strategic plan and coordinated with the Medical Center and University’s strategic initiatives.

**Scope of Services**
The University is seeking a firm(s) to provide consulting services to facilitate the development of a comprehensive, integrated space plan that supports the three themes identified in the SOM academic strategic plan: innovation, collaboration and integration. The integrated space plan will complement and support both the strategic initiatives outlined by the Office of the President, the SOM and the Medical Center strategic plans. The planning study will include a comprehensive review of all Health System space and programs: SOM research, educational, clinical and administrative functions, and Medical Center inpatient, ambulatory and satellite components. The main objective is to align the existing strategic plan with the physical resources and develop a capital improvement plan for the SOM.
Services provided will include those services necessary to help the University achieve its goals as outlined in this RFP:

**School of Medicine:**

- The review and understanding of existing strategic plans and institutional priorities, including key initiatives identified for investment. Understand the faculty and workforce plan for the SOM.
- Interview all key stakeholders in the SOM, UPG, and Medical Center.
- Interview key collaborators across the University, including those in the Schools of Nursing, Engineering and Applied Science, the Claude Moore Health System Library, Darden School of Business, and the Batten School.
- Outline and recommend a structure for establishing the planning process, including overall leadership and working committees, and an associated timeline.
- Facilitate meetings with University faculty and staff to solicit input and feedback to determine program needs and current challenges in the existing space management structure at the SOM and Health System.
- Analyze detailed facility assessment reports to determine highest and best use for each facility. Determine which facilities can support key mission programs and which can no longer continue to house these functions.
- Provide national benchmark research, medical education and clinical trends regarding space metrics for utilization and productivity, space allotment, and space governance structures in peer institutions. Highlight strengths and challenges of each. Provide case studies of other academic health systems.
- Conduct needs based assessment: definition of space and functional requirements and key programmatic adjacencies centered on operational and functional outcomes. Include review of all vivaria. Review and analyze each program’s current physical assets, which may span and support all three missions: research, education and patient care.
- Coordinate programmatic and operational requirements with physical development options.
- Determine overall space plan for all SOM facilities which supports initiatives identified in the strategic plan. This plan will require flexibility in space assignments and a space governance structure that enables the SOM to adjust physical asset allotments with dynamic program needs and investments that change rapidly. Current management and governance structure is rigid and static, often delaying key decisions.
- Develop a prioritized capital investment plan that supports and aligns with the SOM academic plan as well as the strategic initiatives of the Medical Center and the University. The capital investment plan will also include an analysis of investment needed to sustain the plan for the future.
- Complete work within nine to twelve months of the contract start date.

The SOM will provide assistance for scheduling meetings, taking minutes, drafting documents, preparing presentations, and other required support.

**Medical Center:**
• Review Medical Center’s ambulatory care clinic network’s expansion strategy, existing facilities, and future space needs and study how this function overlaps with other Health System programs to improve efficiency, enhance the patient care experience capitalize on nationally recognized programs and market place differentiators.

• Review and analyze the current and future inpatient care programs, focusing on external market drivers, national health care trends, the Medical Center’s ambulatory network as inpatient generator, GME and SOM role in patient care, with an emphasis on operational and functional outcomes.

• Review and analysis of the Medical Center’s strategic partnerships with regional Health Care Providers, Culpeper RH, Novant Health, etc. with focus on shared strengths, market position, geographic coverage, key patient population drivers, and consumer preferences.

• Understand the workforce plan and ability to meet future needs to support expansion strategy for the Medical Center in the face of an increasingly competitive labor market, high turnover rate and future labor shortages.

C. BASIS OF SELECTION

Proposals will be evaluated based upon the overall merits/value of the proposal including, but not limited to, price. The University will evaluate proposals, and if a firm is to be selected, select the firm on the basis of:

1. The firm's plan to provide the University with the services as described in the Background and Scope of Services section;
2. The firm’s experience in providing Services similar to those described in this RFP, to include the firm’s references from clients;
3. The firm’s price proposal;
4. The quality of the proposal, specifically, responsiveness to requirements and adequacy of information provided;
5. The firm’s Small, Woman-owned and Minority-owned (SWAM) business status and/or the firm’s plan for utilization of SWAM businesses. For more information about SWAM and the University’s SWAM plan, please see the letter in Attachment 1 and refer to the following site: www.procurement.virginia.edu/main/publicpostings/rfp/SWAMplan.pdf
   Note 1: A 10% minimum weight will be given to this criterion in evaluating proposals.
   Note 2: Any questions related to SWAM business and SWAM subcontracting opportunities can be directed to Les Haughton, Director Supplier Diversity, at (434) 924-7174 or lh7sn@virginia.edu.
6. Any other factors relevant to the firm's capacity and willingness to meet the University requirements.

Proposals will be evaluated based upon the overall merits/value of the proposal including, but not limited to, price. All proposals received will be carefully evaluated by the University. The University then intends to conduct negotiations with two or more firms. After negotiations have been conducted, if the University chooses to make award, the University will select the firm(s) which, in its opinion, best meets the needs of the University. Alternately, if the University determines in writing and in its sole discretion that only one firm is fully qualified, or that one firm is clearly more highly qualified than the others under
consideration, it may decide to negotiate and award an agreement to that single firm. In either event, the University intends to execute a mutually satisfactory written agreement which will reflect and largely incorporate this RFP as reconciled with any pertinent documents, such as the proposal submitted and relevant negotiation correspondence.

Because the University may choose to negotiate and award to a single firm as discussed above, each firm must include in its written proposal all requirements, terms or conditions it may have, and should not assume that an opportunity will exist to add such matters after the proposal is submitted.

Any firm(s) invited to negotiations should note that the University reserves the right to begin negotiations by combining the best aspects of submitted proposals from all responding firms as the basis for subsequent formation of any Agreement resulting from this RFP.

Firms should also note that, as described within, certain matters will automatically be deemed part of the proposal.

D. CONTENTS OF PROPOSAL

Proposals will be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis will be on completeness and clarity of content, and will be organized in the order in which the requirements are presented in the RFP.

Unnecessarily elaborate brochures and other presentations beyond that sufficient to present a complete and effective proposal are not desired and may be construed as an indication of the firms’ lack of cost consciousness. Elaborate artwork, expensive paper and bindings, and expensive visual and other presentation aids are neither necessary nor desired.

Firms will provide the following information:

1. A letter of introduction addressing the advertised criteria and stating specifically the team’s successful experience providing space planning services for colleges and universities, particularly academic health systems. If the team is an association between several firms, include information regarding previous collaborations and a clear statement of the organization and responsibilities for each firm. Include the name of the firm’s primary contact during the RFP process with their phone numbers and email address.

2. A statement addressing the firm’s philosophy and methodology for working with University stakeholders to develop program specific goals.

3. An outline of the firm’s proposed plan to deliver the required services and meet the performance requirements detailed in this RFP and supporting documentation. Include:
   - Statement of the firm’s current workload and capacity to provide the requested services on schedule and on budget; and
   - Chart identifying each proposed team member’s experience and responsibility in the planning process. Include a biography of each team member assigned to this project.

4. Pertinent and related explanatory text and images which show five relevant planning efforts completed by the firm within in the last seven years. For each project, include:
   - Goals and outcomes, please explain firm’s scope of work;
   - Date of completion;
   - Names of individuals from the firm involved;
   - Role of each individual performed in these studies; and
• Current reference and contact information, including telephone numbers and email addresses for each planning effort listed above.

5. Methodology of working with the University.

6. Financial proposal to include:
   • The firm’s proposed fee/rate for providing the Services. Provide separate pricing for specific components of the project. Include hourly rates for all positions proposed to the project;
   • Describe how the University will be charged. Include any additional discounts available for early payment of invoices;
   • Describe how the University will benefit from cost savings by accepting the firm's proposal;
   • State the firm’s agreement to receive payments electronically via Bank of America’s (“BoA”) ePayables® method of electronic payment or BoA’s PayMode® method of electronic payment. For more information about these payment methods, click here: http://www.procurement.virginia.edu/pagepaymentmethods. Prior to contract award, the Selected Firm will be required to contact University Procurement and Supplier Diversity Services’ Payment Processor Specialist group to set up its preferred method of receiving electronic payments [Phone: (434) 924-4212 and E-mail: uva-prs-boa@virginia.edu].

7. The firm’s Small, Woman-owned and Minority-owned (SWAM) businesses status and/or how the firm intends to utilize SWAM firms in regards to this particular procurement. For more information about SWAM and the University’s SWAM plan, please refer to Attachment 3 and this site: www.procurement.virginia.edu/main/publicpostings/rfp/SWAMplan.pdf. Any questions related to SWAM business and SWAM subcontracting opportunities can be directed to Les Haughton, Director, Supplier Diversity, at (434) 924-7174 or lh7sn@virginia.edu.

8. Contractual Arrangements:
   • Provide the University with any form or contract the University may be requested to sign;
   • Provide a written statement with the firm’s proposal that its principals or legal counsel has reviewed Attachment 1, Mandatory Contractual Provisions, and Attachment 2, Preferred Contractual Provisions, and agrees that these provisions will become a part of any final agreement;
   • Provide a list of clients with which the firm has signed a term contract that allows for cooperative procurement and/or if the firm has a General Service Accounting (GSA) schedule contract;
   • Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of the VASCUPP Members can be found at https://vascupp.org/

10. Complete and return the information requested in Attachment 2, Firm Information.

**NOTE:** Virginia Freedom of Information Act
Except as provided, once an award is announced, all proposals submitted in response to this RFP will be open to inspection by any citizen, or interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by a firm prior to or as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act only under the following circumstances: (1) the appropriate information is clearly identified by some distinct method such as highlighting or underlining; (2) only the specific words, figures, or paragraphs that constitute trade secrets or proprietary information are identified; and (3) a summary page is supplied immediately following the proposal title page that includes (a)
the information to be protected, (b) the section(s)/page number(s) where this information is found in the proposal, and (c) a statement why protection is necessary for each section listed. The firm must also provide a separate electronic copy of the proposal (CD, etc.) with the trade secrets and/or proprietary information redacted. If all of these requirements are not met, then the firm’s entire proposal will be available for public inspection.

**IMPORTANT:** A firm may not request that its entire proposal be treated as a trade secret or proprietary information, nor may a firm request that its pricing/fees be treated as a trade secret or proprietary information, or otherwise be deemed confidential.

### E. TERMS AND CONDITIONS

This solicitation and any subsequent award is subject to:

- The Selected Firm registering as a vendor with the University of Virginia. [https://www.procurement.virginia.edu/pagevendorregistrationform](https://www.procurement.virginia.edu/pagevendorregistrationform)

- Unless otherwise deemed appropriate by the University, the Selected Firm(s) will enroll in one of the University approved methods for receipt of electronic payments. Accordingly, the Selected Firm agrees to accept Bank of America’s (“BoA”) ePayables® method of electronic payment or BoA’s PayMode® method of electronic payment.


**Note:** Unless a firm expressly and specifically states its exception to any of the Preferred Provisions in its written proposal, then the proposal from the firm will automatically be deemed to include those Provisions.


### F. OTHER INFORMATION

**Insurance**

Listed below is the insurance the Selected Firm must maintain under any Agreement resulting from this RFP. In no event should the Selected Firm construe these minimum required limits to be its limit of liability to the University. The Selected Firm will maintain insurance which meets or exceeds the requirements of the University with insurance companies that hold at least an A-
financial rating with A.M. Best Company. No Agreement will be executed by the University until the Selected Firm satisfies the insurance requirements of the University. The Selected Firm may be required to provide the University with a valid Certificate of Insurance before providing any goods or services to the University. The University reserves the right to approve any insurance proposed by the Selected Firm.

Commercial General Liability:
The Selected Firm and any Subcontractor will maintain a minimum Limit of Liability for bodily injury and property damage of $500,000 per occurrence, and an aggregate limit of at least $1,000,000, with coverage for:

{X} Premises – Operations
{X} Personal Injury

Errors and Omissions:
The Selected Firm and any Subcontractor will maintain Professional Errors and Omissions liability insurance with a limit of not less than $1,000,000 per claim.

Automobile Insurance:
The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of $500,000 per occurrence with the following coverages for vehicles operated by their employees.

{X} Owned and Non-Owned Automobiles

*Additional Insured:
The University will be named as an Additional Insured, and the proper name is: "The Commonwealth of Virginia, and the Rector and Visitors of the University of Virginia, its officers, employees, and agents."

Formation of the Agreement with the Selected Firm

All proposals received will first be carefully evaluated by the University, and then the University intends to conduct negotiations with two or more firms. After negotiations have been conducted, if the University chooses to make award, the University will select the firm which, in its opinion, best meets the needs of the University. Alternately, if the University determines in writing and in its sole discretion that only one firm is fully qualified, or that one firm is clearly more highly qualified than the others under consideration, it may decide to negotiate and award an agreement to that single firm. In either event, the University intends to execute a mutually satisfactory written agreement which will reflect and largely incorporate this RFP as reconciled with any pertinent documents, such as the proposal submitted and relevant negotiation correspondence.

Because the University may choose to negotiate and award to a single firm as discussed above, each firm must include in its written proposal all requirements, terms or conditions it may have, and should not assume that an opportunity will exist to add such matters after the proposal is submitted.

Any firm(s) invited to negotiations should note that the University reserves the right to begin negotiations by combining the best aspects of submitted proposals from all responding firms as the basis for subsequent formation of any Agreement resulting from this RFP.
Firms should also note that, as described above, certain matters will automatically be deemed part of the proposal.
Greetings:

The quality of service the University of Virginia is able to deliver to its customers is directly related to the excellent support we receive from you and many other outstanding suppliers of goods and services. Without you, we would not be able to fulfill our educational, health care and research missions. An important part of our procurement program involves our commitment to doing business with small, women- and minority-owned (SWaM) businesses. As one of our most important vendors, we look to you to help us achieve this objective.

We conduct substantial business with small firms. We have a particular institutional focus on developing long-term business relationships with minority-and women-owned businesses. We count on our majority firms to help us achieve our goal.

I seek your assistance in two areas. First, to the extent practical, I ask that you involve small, women-and minority-owned businesses in the delivery of services you provide to UVa. The office of Procurement and Supplier Diversity Services is ready to assist you in identifying qualified diverse business partners. Second, I seek your help in reporting your results through our quarterly subcontracting reports. The terms and conditions previously provided to your organization outlined this process.

This effort is important to us. We depend on you in so many ways – this is another way that we can partner with your company to make things better.

Sincerely,

Colette Sheehy
Vice President for Management and Budget
### Firm Information

<table>
<thead>
<tr>
<th>Full Legal Name (Company name as it appears with its Federal Taxpayer Number):</th>
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<tbody>
<tr>
<td>Address:</td>
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<tr>
<td>Telephone Number:</td>
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<tr>
<td>Web Address:</td>
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<tr>
<td>Email Address:</td>
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<td>DUNS Number:</td>
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#### SWAM Information:

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<tr>
<th>Is the firm certified with the Commonwealth of Virginia’s Department of Small Business &amp; Supplier Diversity (SBSD):</th>
<th>Yes</th>
<th>No</th>
</tr>
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| Minority-Owned Business: | Yes | No |
| Women-Owned Business: | Yes | No |
| Small-Owned Business: | Yes | No |

| Is the firm registered as a vendor in the Commonwealth of Virginia’s e-procurement system (eVA)? | Yes | No |

### Point of Contact for this Proposal:

| Name: |
| Address: |
| Office No. | Mobile No. | FAX No. |
| Email Address: |