REQUEST FOR QUALIFICATIONS

For

PROFESSIONAL CONSULTING SERVICES

SPACE UTILIZATION AND SPACE PLANNING CONSULTING SERVICES

University of Idaho
Moscow, Idaho

March 27, 2023
UI PN CP230054
WO 38748

For additional information contact:

Raymond Pankopf, Director   -or-   Lee Fleeming, Construction Contract Specialist
Architectural & Engineering Services, Facilities, University of Idaho

(208) 885 6246               (208) 885 9333 (fax)
REQUEST FOR QUALIFICATIONS
for Professional Consulting Services

Space Utilization and Space Planning Consulting Services

University of Idaho
Moscow, Idaho

To: Space Utilization and Space Planning Consultants

From: Kim Salisbury, Associate Vice President
Capital Budget and Planning, University of Idaho

Subject: Space Utilization and Space Planning Analysis and Recommendations in regard to major Research and Academic Facilities located both on the main campus of the University of Idaho, Moscow, Idaho, and at selected research and academic facilities at various research and Academic Centers located around the State of Idaho at Coeur d'Alene, Boise, and Idaho Falls. UI CP230054

Date of Issue: Monday, March 27, 2023

The University of Idaho is seeking qualifications from interested Consulting firms to assist the university in an effort to examine and evaluate the university’s current profile of space utilization and distribution. In particular, this effort will focus on research and academic learning facilities, space use guidelines and standards, and related policies and procedures. The final result will include recommendations to the university for how space, and space utilization, will support and facilitate the university’s overall strategic goals moving forward.

The university previously completed a comprehensive Long Range Campus Development Plan (LRCDP). This plan defined nine major goals and objectives for the development of the Moscow campus of the university, one of which centered on Space Utilization and Planning. The university has made significant strides in the physical development of the campus, in keeping with the guidelines, principles, and objectives of the LRCDP but, progress on the Space Planning and Utilization goal has been less significant. This analysis recognizes the need and seeks to make progress on the space utilization and planning goals.

The University of Idaho is engaged in specific strategic efforts aimed toward the achievement of “R1, Doctoral Universities – Very High Research Activity” classification within the Carnegie...
Classification of Institutions of Higher Education. The university has developed an “R1-2026 Research Initiative” and is taking active steps towards the achievement of R1 status through this initiative and investments in funding via programs such as the P3-R1 Initiative and Grant Matching Program. This initiative, enabled by a public-private partnership on the university’s energy infrastructure, provides for an annual investment of funds to increase research productivity and support doctoral degrees programs.

While these significant programs and initiatives are underway, the university recognizes that the goals and objectives contained in the Long Range Campus Development Plan regarding Space Utilization and Planning must be addressed to further support the university’s R1 objectives. The university therefore seeks a qualified Space Utilization and Space Planning Consulting team to assist the university in moving forward in our strategic goals.

Qualification Statements from firms/teams interested in providing related services for this effort will be received at the office of Architectural & Engineering Services, University of Idaho, Moscow, Idaho, 83844-2281 until close of business (COB) at 5:00 p.m., Friday, April 21st, 2023.

Any questions which arise from this request, shall be addressed to:

Raymond Pankopf, NCARB, Director
Architectural & Engineering Services
University of Idaho
Moscow, Idaho 83844-2281
(208) 885-6246
rayp@uidaho.edu

The initial contract is envisioned to be for the Space Utilization and Space Planning Consulting services described herein, and the initial authorization by the Board of Regents of the University of Idaho for this effort is limited to the Space Utilization and Space Planning Consulting services.

Additional services may be required at the university’s discretion. As noted, such additional services are contingent upon additional authorization by the University of Idaho Board of Regents. Or the university may, at the university’s option, elect to issue a separate, follow-on Request for Qualifications.

Clarification of the information provided herein and additional data may be requested by phone or by email. The university respectfully requests that interested Consulting firms limit their contacts to the named individual and contact only this person in the interest of maintaining a consistency of response and fairness to all respondents. Please make no contact with other members of the university, except regarding certain items as specifically directed herein.
Background Setting:

University of Idaho: The University of Idaho is located in northern Idaho in the town of Moscow, Idaho. The university is a public land grant institution with primary responsibility within the State of Idaho for performing research and granting the Doctor of Philosophy Degree. According to the university’s Annual Report, enrollment approaches 13,000 students, of which 9,000 are served on the main campus in Moscow, Idaho. The university maintains branch centers in Coeur d’Alene, Post Falls, Boise, and Idaho Falls, as well as several significant Research Centers and Extension sites in nearly all Idaho counties.

As the land-grant university for the State of Idaho, the University of Idaho places emphasis on problems and challenges facing Idaho and Idahoans. The university hosts a broad array of undergraduate and graduate instructional and research programs in selected scientific and technical disciplines. In round figures, research expenditures range from $105 million to $115 million, annually.

More information regarding the university may be obtained by visiting the university web site at http://www.uidaho.edu, or, by visiting the University of Idaho Budget and Planning web site at https://www.uidaho.edu/dfa/budget-and-planning.

Description of the Project:

Proposed Project Description:

The University of Idaho proposes to identify a qualified Space Utilization and Space Planning Consultant to provide assistance and services to the university related to the concepts of Space Utilization and Space Planning, how those concepts might be applicable to the specific circumstances present at the university, and how Space Utilization and Space Planning best practices might assist the university in regard to meeting the university’s R1 status goals and objectives.

It is envisioned that the firm and/or team selected via this Request for Qualification process will work with the university to:

- Understand and evaluate the current Space Utilization and Space Planning policies, practices, and procedures.
- Identify strategies and possible policies regarding the use of space in the areas of research, general education/academic learning, and administration.
- Work to identify reasonable and obtainable goals regarding the balance of all types of space.
- Assist the university to understand the implications of the post-Covid work environment and how the new, changed environment impacts the basic understandings and assumptions regarding Space Utilization and Space Planning.
- Make recommendations and provide examples for Space Utilization and Space Planning best practices and policies.
- Making recommendations for processes to analyze and optimize space utilization and predicting future space requirements.
• Making recommendations for space utilization guidelines and benchmarks, to include recommendations for guidelines and standards which might be appropriate for adoption by the University of Idaho.
• Providing recommendations and referenced best practices for reallocating spaces to achieve institutional goals, objectives, and strategic priorities.
• Additional, related Space Utilization and Space Planning topics as might surface and develop through the course of the work.

Funding for this set of initial set of Space utilization and Space Planning Consulting Services will be provided through the use of institutional funds. No State of Idaho funds are anticipated, and the project will be administered by the University of Idaho.

The initial scope of services resulting from this RFQ process is limited to the Professional consulting Services described herein. However, it is possible that future services may be desired and that those services may be added at the university’s discretion via addendum to the work initiated by this Request for Qualification process.

Scope/Intent of the RFQ:
It is the intent of this Request for Qualifications to identify a Professional Consultant firm or team best qualified to assist the university with the services as described in this RFQ.

Form of Agreement:
The university intends to enter into a contract with the selected teams for the services described herein. The university typically relies on AIA standard forms of agreement modified by a supplemental agreement developed by the University for all of its professional service contracts. Additional services may be required beyond these initial assumptions.

Required Services:
To the extent that services provided by the consultant selected under the terms of this Request for Qualifications are affected by the following, the consultant shall be required to consider/conform with the Long-Range Campus Development Plan (LRCDP), current university CAD standards, applicable building codes, universal access design guidelines and codes, applicable energy and resource codes as they may have impact upon infrastructure recommendations, and address material and maintenance concerns.

The consultant shall be required to meet as required with the university project manager and other concerned stakeholders to discuss and refine issues and inputs during the course of the effort.

The consultant shall develop appropriate economic analyses and cost estimates as appropriate to, and required, by the recommendations made during this set of services in order to evaluate and support
planning and other decisions and recommendations. The consultant may also be required to advise the owner of other cost and value analyses as required.

Future services may or may not be required at the university’s discretion and are contingent upon successful achievement of Regents’ Authorization. If such additional services are desired of the consultant by the university, these will be administered by the University of Idaho, except in the possibility of State of Idaho funding as noted hereinbefore. The university reserves the right to award contracts for these services as the needs of the university requires during the progress of the contract.

**Informational Documents:**

The University of Idaho Strategic Plan and Long Range Campus Development Plan and other pertinent documents and information are available on the UI web pages.

Items of specific interest include:

- University home page: [http://www.uidaho.edu](http://www.uidaho.edu)
- University Strategic Plan: [http://www.uidaho.edu/president/leadingidaho](http://www.uidaho.edu/president/leadingidaho)
- R1-2026 Research Initiative: [https://www.uidaho.edu/president/university-working-groups/research](https://www.uidaho.edu/president/university-working-groups/research)
- P3-R1 Initiative: [https://www.uidaho.edu/research/faculty/find-funding/internal-funding/p3-r1-initiative](https://www.uidaho.edu/research/faculty/find-funding/internal-funding/p3-r1-initiative)
- University of Idaho Office of the President: [https://www.uidaho.edu/president](https://www.uidaho.edu/president)
- University of Idaho Office of Research and Economic Development: [https://www.uidaho.edu/research](https://www.uidaho.edu/research)
- University of Idaho Office of Budget and Planning: [https://www.uidaho.edu/dfa/budget-and-planning](https://www.uidaho.edu/dfa/budget-and-planning)
- University of Idaho Architectural and Engineering Services: [https://www.uidaho.edu/dfa/budget-and-planning/aes](https://www.uidaho.edu/dfa/budget-and-planning/aes)

**Proposal Content:**

**A. Basic Qualifications:** Provide basic data relative to the firm's size, history, personnel, special expertise and general credits and qualifications. Individual resumes, awards, associations, etc., may be included. Office brochures should be submitted separately as supplemental data.

The university reserves the right to investigate and confirm the proposer's financial responsibility. This may include financial statements, bank references, and interviews with past clients, employees, consultants, and creditors. Unfavorable responses to these investigations are grounds for rejection of the proposal.
B. Specific Qualifications: List the team anticipated to accomplish the work required by this request, including any anticipated consultants. Describe who will perform the various tasks, the amount of their involvement, responsibilities, and their qualifications.

C. Approach to Project: Include a statement of your approach to projects of this nature and how that approach is to be applied in this specific instance. Include an understanding of the university’s project as currently defined, viable alternative methods and concepts which may be considered, a preliminary schedule indicating staff and resources to be applied to the project and a preliminary outline of the projected time schedules.

D. Past Performance: Submit letters of reference from prior clients or client representatives for this type of management consultant work. Letters from projects listed in item E are preferred.

E. Special Requirements: Provide information regarding specific involvement with projects of this type having similar characteristics. Specifically, the university is interested in demonstrated expertise in space planning, space utilization, recognized, quantifiable, and defensible space standard for institutions of higher education, current trends, and areas of future focus in space planning and utilization.

F. Additional Information: For information purposes, indicate the location of the office where the contract services are to be performed.

G. Format: To assist in the evaluation, format the proposal in a similar fashion to the headings listed herein. Proposals should be clear and concise. Emphasis should be placed on the specific qualifications of the people who will perform the work of this contract and the specific approach to the execution of said work.

Evaluation:

It is desired that up to three, but in no case more than five firms may be selected for an in-person interview. After completion of the interviews, the evaluation committee will adjust the ranking based upon interview performance.

Interview Information:

The interview process is intended to evaluate the capabilities of interested firms to provide services to the university for this project within the context and confines of this RFQ. A selection committee will consist of persons from the university budget, planning, design, facilities management, and client communities. After completion of the interviews, the committee will rank the firms based upon interview performance.

Interviews are planned to be held Tuesday May 9th, Wednesday May 10th, and /or Thursday May 11th, 2023. The University intends to interview the firms at a location in Moscow, Idaho. All parties will be
notified of the exact times and location of their interview. *Interested firms should begin their planning now for key personnel to be available on those dates.*

Each interview will be a maximum of 90 minutes in duration. The format of the interview will be left up to the proposing firm/team; however, at least 30 minutes should be reserved for questions by the selection committee. Members of the firm/team’s proposed project management group must be present at the interview. From the perspective of the university, it is not necessary that members of sub-consulting firms be present. The presence of sub-consultants is therefore at the discretion of the proposing firm/team.

**Interview Evaluation:**

The selection committee will evaluate the interview sessions based upon the following criteria. The University will highly weigh the demonstrated ability and available resources to accomplish the goals and scope of this project within the identified schedule window.

A. **Basic Qualifications:** Present the team anticipated to accomplish the work required, including consultants. Describe who will perform various tasks, amount of involvement, responsibilities and their qualifications and relevant experience.

B. **General Approach to Project:** Characterize the approach to projects of this nature and how that approach will be applied to this specific project. Describe your understanding of the University’s project as currently defined; include viable alternative methods and concepts, which may be considered.

C. **Availability of Personnel and Resources:** Provide a preliminary schedule and assessment indicating staffing levels and resources required to be applied to the project and a preliminary outline of the projected time schedules. Provide an affirming statement regarding the dedication of staffing and resources required for the project’s scope and schedule demands.

D. **Past Performance:** Provide evidence of past work showing specific involvement with projects of this type having similar characteristics. Include evidence of work accomplished for public or corporate clients in streamlined, iterative, and/or expedited processes of project delivery.

E. **Demonstration of the ability to address and respond to the University of Idaho’s desires regarding the services required herein.**

F. **Response to the Owner’s supplementary questions asked during the interview.**
Award:

Based upon the results of the evaluation committee, the University of Idaho will recommend a course of action to the University of Idaho executive leadership. A notice of intent to negotiate will be issued by the University of Idaho in accordance with prescribed procedure.

The university will select one firm for the award of these described services.

Proposed Dates:

Initial schedule assumptions are based upon the dates noted below. The university reserves the right to adjust or extend the dates as necessary and as dictated by the requirements of the project and the process. Any revisions or adjustments to the dates proposed below will be posted on the web site: https://www.uidaho.edu/dfa/budget-and-planning/aes/info-requests/bids

<table>
<thead>
<tr>
<th>Issue Requests for Qualifications:</th>
<th>Monday, March 27, 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>PreSubmittal Conference:</td>
<td>Tuesday, April 11, 2023 (Non-Mandatory)</td>
</tr>
<tr>
<td>Solicitation Protest Deadline:</td>
<td>Thursday, April 13, 2023 @ 5:00PM (COB)</td>
</tr>
<tr>
<td>Proposals Due:</td>
<td>Friday, April 21, 2023 @ 5:00PM (COB)</td>
</tr>
<tr>
<td>Oral Interviews:</td>
<td>Tuesday, May 9, Wednesday May 10, and / or Thursday, May 11, 2023</td>
</tr>
<tr>
<td>Announce Final Selection:</td>
<td>Monday, May 15, 2023</td>
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</tbody>
</table>

Anticipated Performance Period:

In general, University of Idaho planning desires are based on completing the requested services within a six-to-nine month time frame from the Notice to Proceed.

Additional services and related performance periods may be awarded by the University at the discretion of the University.

Selection:

The selection committee will attempt to make a recommendation to the university executive leadership, not later than Friday, May 12, 2023. The University of Idaho will attempt to select a firm/team not later than Monday, May 15, 2023. Upon selection of consultant firm/team, the university will issue a letter of intent to negotiate. However, the final award shall be contingent upon the successful negotiation and approval of a contract. The contents of a submitted proposal may be incorporated in a legal contract or agreement. Proposers should be aware that the methods and procedures proposed could be folded into contractual obligations.
Additional Information:

The University of Idaho reserves the right to reject any and/or all proposing consultant firms interviewed.

The University of Idaho may also negotiate separately with any source in any manner necessary to serve its best interests.

The university reserves the right to investigate and confirm the proposer’s financial responsibility. This may include review of financial statements, bank references, and interviews with past clients, employees, consultants, and creditors. Unfavorable responses to these investigations may be grounds for rejection.

Idaho State law prohibits some professionals from soliciting business in the State of Idaho without proper Idaho licensure. Firms not properly licensed in Idaho, or unsure of their licensure status, are advised to consult with the Idaho Bureau of Occupational Licenses, or an attorney licensed to practice in Idaho before submitting a response to this invitation.

Protests:

Solicitation Protests:
If any invitee is in doubt as to the true meaning of any part of this Request for Qualifications, or detects discrepancies or omissions, such invitee may submit to the university a written request for an interpretation thereof.

If any invitee feels that a particular solicitation provision, condition, or specification limits competition, such invitee may submit to the university a written request for change, including reasons for the request and the proposed change.

Any interpretation of the invitation or approval of changes will be made only by addendum duly issued. A copy of each addendum will be mailed, faxed, or delivered to each invitee receiving an invitation to interview and becomes part thereof. Receipt of each numbered addendum shall be acknowledged by the invitee in the response to the invitation to interview. The university will not be responsible for any other explanation or interpretation of the invitation to interview.

Prospective interviewees may submit a request for change of particular solicitation provisions and specifications and conditions to Raymond Pankopf no later than Thursday, April 14, 2023, at 5:00PM (COB). Such requests for change shall include the reasons for the request and any proposed changes to the solicitation provisions, specifications, and conditions.

Selection Protests:
Any invitee who claims to have been adversely affected or aggrieved by the selection of competing invitees to interview, or by the final selection of a candidate to recommend to the University of Idaho Executive Leadership for award, shall have five calendar days after notification of those firms who will be considered further for this award to submit a written protest of the
selection to the Associate Vice President for Budget Planning, University of Idaho, Moscow, Idaho 83844-2281. This written notification is to be received by 5:00 p.m. (COB) within the identified five calendar-day period.

Additional Requirements:

Any firm that accepts an interview shall represent and warrant the following:

A. That it is financially solvent, able to pay its debts as they mature, and possessed of sufficient working capital to perform the services and work described herein;

B. That it is capable of performing and completing the services and work described herein and has sufficient resources, experience, and competence to do so; and

C. That it is authorized to practice and to do business in Idaho, properly licensed by all necessary governmental, public, and quasi-public authorities having jurisdiction over it and the services and work described herein and has or will obtain all licenses and permits required by law.

To confirm your interest in participating in the request process please contact, either by phone or e-mail:

Raymond Pankopf
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University of Idaho
Moscow, Idaho 83844-2281
(208) 885-6246
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(208) 885-9333 fax

UNIVERSITY OF IDAHO, SPACE UTILIZATION AND SPACE PLANNING CONSULTING SERVICES RFQ
11 of 12
**Submittal Requirements:**

Interested firms should submit ten (10) copies of the Response Materials as described herein plus one (1) of any additional materials that a firm may wish to submit (i.e.: Sample Reports, Portfolios, etc.).

As stated hereinbefore, submit ten copies of the proposal responding to the requirements detailed in this RFQ plus one copy of any additional data. All submittals shall be made to:

Raymond Pankopf, Director
Architectural & Engineering Services
University of Idaho
875 Perimeter Drive MS 2281
Moscow, Idaho 83844-2281

Proposals shall be clearly labeled, reference this RFQ, and be submitted no later than:

**5:00 p.m. PDT, Friday, April 21, 2023.**