REQUEST FOR PROPOSAL

For Professional Design Services

Enter Project Name Here

.Select Building Name.

HHC RTN INSERT RTN HERE &
CBN TBD

Submittal Deadline
3:00 PM on
Insert Date Here
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   Overview of project scope, key facts and special considerations

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I.) PROJECT DESCRIPTION:

Include a brief project description including restrictions here (Building, floors, square footage, etc. Limit to one paragraph) Note: Make note of any special alternates, conditions, assumptions, etc.

See attached UMHHC RTN INSERT RTN HERE narrative and plans for additional information.

Summary of key project information:

- Construction Budget: approximately $0
- Size of Project (BGSF): approximately - - - -
- Location of Project: Select Building Name.

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<th>Schedule Requirements</th>
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<th>End</th>
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<tr>
<td>- Design</td>
<td>Month/Year</td>
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<tr>
<td>- Construction (incl. Bid/Award)</td>
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II.) THE DESIGN PROFESSIONAL’S SERVICES

Basic Services:

The Design Professional's “Basic Services” means all responsibilities assigned to the Design Professional in this Proposal.

Summary of “Basic Services”:

PHASE I - Investigation/Schematic Design Phase

During the Investigation/Schematic Design Phase the Design Professional shall do the following:

1) Meet with the Owner’s representative(s) to define the scope of service and prepare the CSA. Meeting minutes shall be distributed to UMHHC Design Manager via email in PDF format and is required within three working days of meeting.

2) Prepare Continuing Services Agreement (CSA) within five working days of meeting.

3) Collect information, including equipment lists, system descriptions, functional and space needs and operational narratives, space inventory, key plans, and record construction documents.
   a) Obtain AutoCAD key plans from FPD.
   b) Obtain a completed and signed CSA Worksheet from the UMHHC Design Manager directing the detail level of investigative report desired.
   c) Unless specifically directed otherwise, commission a pre-design air test report if responsible for coordinating the schedule and any special needs or limitations with the Building Manager and the Air Testing Company.
Report shall be included as a reimbursable expense by Design Professional.

d) Obtain record construction documents through the UMHHC Document Coordinator.

4) Inspect site of renovation, as-built condition of space, and other ‘due-diligence’ work needed to insure that program prepared:
   a) Has all pertinent issues covered.
   b) Infrastructure, and space, needed to accomplish project is in place, or needed additional work and costs are included in ‘Program Statement’.
   c) Note and address any obvious code violations in project area.
   d) Needed work in areas above, below, or adjacent project areas are noted.
   e) Review of FCA (Facilities Condition Assessment) documents to determine if known deficiencies exist. Design Manager shall direct how to include FCA deficiencies within the project scope of work.

5) Prepare drawings and submit to Owner for Owner's review and comments.
   a) Prior to follow up design team meetings, distribute review materials, including revised programs, floor plans, meeting minutes, drawings or other review material to Design Manager a minimum of 24 hours prior to scheduled meeting.
   b) Design Professionals shall not assign room numbers.
   c) In addition to Demolition and New Work Floor plans, provide additional drawings specifications as required to full explain the schematic scope of work.
   d) The Design Professional shall validate system capacities for all proposed modifications of existing systems.
   e) Design Professional shall provide proposal solutions and cost for identified system deficiency.
   f) Design Professional shall review the structural capacity of the building for the proposed use.

6) Prepare a written Investigative Report which includes:
   a) An executive summary of no more than one page that defines the purpose of the project, a brief summary of existing conditions, Design Professional’s recommendations, construction cost estimate total, and gross square footage of new and/or renovated space.
   b) A space program. Include net to gross factors if a new work plan is not provided.
   c) Affinity relationship studies, conceptual block plans, layouts and massing studies if required.
   d) Clear drawings indicating scope of demolition and new work.
   e) Description of existing conditions and recommendations for new work. Note any assumptions that were taken, or necessary, when preparing the report. If the reason for any given assumption is not obvious – define the reason.
f) Owner’s moveable equipment requirements. Obtain preliminary equipment lists, size and utility information from assigned UMHHC Capital Equipment planner.
g) Owner’s interior design requirements. Obtain preliminary interior finish information, including quality levels and specialty items, and preliminary furniture program from assigned UMHHC Interior Designer.
h) Engineering systems requirements of new project. Coordinate engineering requirements and concepts with assigned UMHHC Engineer(s). Coordinate new work requirements with UMHHC Security, Telecommunications, MCIT, Biomedical Engineering and others designated by Design Manager regarding all special systems.
i) Site and parking requirements, both during construction and upon completion (if applicable).
j) An analysis of existing buildings and systems conditions including major system variables as needed. If needed, obtain air balancing information, loadings on equipment, etc. This shall include all associated work, back to ‘main source’ as needed to maintain overall building system integrity.
k) A description of regulatory performance requirements and restrictions, and any existing code violations needing to be addressed, with recommendations. Review proposed solutions with regulatory agencies. Assist Owner with all meetings with Regulatory Agencies. Provide a list of all applicable codes and regulatory agencies.
l) Estimated construction costs for all aspects of the Project. See Exhibit G for estimating format requirements.
m) Detailed Phasing Plans, if required for continued operation or occupancy of adjacent spaces, supplemented by a narrative.
n) Where maintenance of critical services to occupied spaces will be compromised, provide a tentative sequence of work noting likely outage durations.
o) If specifically requested, provide a projection of significant operating costs or life resulting from the Project and estimate significant life-cycle operating and maintenance costs of new architectural, mechanical and electrical components where there is significant variance between alternate designs.

7) Obtain review comments from the UMHHC Design Manager. Respond promptly to any review comments on the report, and promptly revise and reissue report if required.

PHASE II – Construction Document Phase

NOTE: Funded projects which are managed by UMHHC Facilities Planning and Development during the Construction Document Phase are constructed internally by UM Construction Services or in buildings leased by UMHHC. Funded projects which will be competitively bid to General Contractors are generally managed by UM A/E/C Construction Management. The following requirements apply specifically to Construction Services and leased facilities projects. UM A/E/C maintains a separate professional services agreement.
During the Construction Documents Phase the Design Professional shall do the following:

Is Air Balance Test Report Required?

1) Meet with the Owner's representatives to further define project requirements.
2) Confirm all assumptions contained within the Investigative Report. Design professional shall notify UMHHC Design Manager of all changes to funded scope of work that will impact the construction costs, construction duration or is outside the approved scope of work.
3) Continue to meet regularly with design team as required to fully develop the scope of work.
4) Review furniture layout provided by UMHHC Interior Design to insure compliance with architectural, structural, mechanical and electrical systems. Incorporate furniture plan into Construction Documents for reference.
5) Obtain final equipment lists and equipment cut sheets from UMHHC Capital Equipment and prepare refined equipment plans for review by the Owner. Include Equipment Commodity Code numbers assigned by Capital Equipment on the Equipment Plans. Fully coordinate equipment into the construction documents, including clearances, utilities, power requirements and heat generated for optimal performance.
6) Review door and hardware functions with the design team and UMHHC Security. Provide complete hardware sets and specifications, including all electrical hardware and wiring diagrams.
7) Generate a Room Finish Schedule for Owner input and approval and incorporate into Construction Documents. Obtain final finish selections, including manufacturer, model and color selections and any patterns from UMHHC Interior Design. Include all finish selections on Complete CD Owner Review documents.
8) Prepare Design Development drawings (when specifically requested as a deliverable during the Design Kick-off Meeting), outline specifications (tailored to this project), and full descriptions for each of the architectural, civil/structural, mechanical and electrical systems; show schematic and riser diagrams, contractor furnished equipment; and submit all such documents to the Owner. If requested, submit sketches, copies of all calculations, cut sheets of proposed products, and cost estimates of the various systems studied with a recommendation and justification of the system proposed. The Design Professional shall validate system capacities for all proposed modifications of existing systems. Design Professional shall provide proposed solutions and costs for identified system deficiency. All documents shall relate specifically to the Project.
9) Prepare construction drawings with construction cost estimates and submit to UMHHC Design Manager for CD Review at percentages of completion as requested, including 100% complete. All documents within set and all disciplines shall be to stated completion percentage. Alert UMHHC Design Manager immediately (and prior to expected delivery date) if unforeseen circumstances prevent the documents from being completed to stated percentage of completion. Do not submit documents that are not to the stated level of completion without the specific permission of UMHHC Design Manager. If additional information or decisions are required by UMHHC staff, clearly identify needed information on
the title sheet of documents, or on a separate document which accompanies the
CD's. Communicate clearly and regularly with UMHHC Design Manager what
items are outstanding, so that all issues known to the Design Professional can be
resolved prior to 100% CD review. Submit with the documents and indexed copy
of all design calculations to include structural design, heating, plumbing, air
conditioning and electrical if requested.

10) Obtain construction document review comments, sign-off from owner's clients,
and approval to proceed from UMHHC Design Manager. Promptly respond in
writing to all UMHHC design review comments on the comment forms and attach
to the meeting minutes. Issue revised documents for construction within 5
business days unless directed otherwise by the UMHHC Design Project Manager.

11) Submit sealed sets of Construction Documents for final review and approval by
the appropriate regulatory agencies where required and authorized by the
UMHHC Design Manager. Design Professional shall pay plan review fees
directly as a reimbursable expense. Submit copies of sealed CD's, plan review
forms and transmittals to UMHHC Design Manager. Design professional shall
respond promptly, in writing, to all plan review comments by regulatory agencies,
and shall revise the documents as required to obtain regulatory approval as a basic
service.

12) Prepare operational narrative for MDCH HFES plan review if directed in CSA
worksheet. Otherwise, assist UMHHC with preparation of operational narrative.

PHASE III - Construction Phase

During the Construction Phase the Design Professional shall do the following in a timely manner:

1) At the Owner’s direction, participate in construction “kickoff” meeting and
attend construction progress meetings as outlined in CSA worksheet.
2) Respond in writing to RFI’s within two business days. Revise drawings or
prepare supplemental drawings as required, and issue with unique sheet
numbers.
3) Clarify ambiguities in Construction Documents.
4) Review/approve or take other appropriate action with regard to shop
drawings and samples. Solicit and incorporate comments from UMHHC FPD
staff, including Interior Design and Engineering.
5) Prepare Field Orders and Bulletins.
6) Review and respond to contractor(s) claims.
7) Conduct field observation of construction as a basis for determining
conformance with the Construction Documents.
8) Participate, as necessary, with the Owner in all interaction with regulatory
agencies for reviews and inspections.
9) Prepare and submit punch lists to the Design Manager; number and timing to
be designated on the CSA worksheet.
10) Review O&M Manuals in the same manner as that of any other contractor
submittal.
11) Review change quotations and make recommendations for Owner
acceptance.
Additional Requirements:

1. This document is NOT a professional services agreement. This document is acting only as a scope of work and proposal template only. The selected AE will be requested to submit a CSA with all terms and conditions outlined with the existing AE professional services agreement on file with FPD.

2. Licensing and Applicable Standard of Care. The Design Professional warrants and represents to the Owner that the Design Professional is fully licensed by the State of Michigan to perform the services designated in this Agreement. The Design Professional, in performing each and every aspect of its work under this Agreement, shall exercise the professional standard of care customarily provided in the performance of the types of services addressed in this Agreement (for a construction project similar in size, scope and complexity to the Project) by a firm having a stature comparable to the stature the Design Professional holds itself out as having, and shall accomplish all work in conformance with the codes, rules, laws and regulations applicable to the Project.

3. Professional Licensure. It is a requirement that the A/E provide a project team with Licensed Professionals in each Engineering and Architectural Discipline as required to complete all components of design and to meet state and federal requirements for review by Licensed Design Professional. It is a further requirement that the A/E name each Licensed Design Professional who will participate in the design process and that these persons will affix their Professional Stamp to Bid Documents, Regulatory Review Sets, Addenda and Bulletins as may be required to complete the project.

III.) PROPOSAL CONTENT & FORM

The Design Professional’s Proposal must include the following:

- **Firm Qualifications & Similar Projects:** A list of projects (not to exceed 5) which demonstrates the Design Firms capability to successfully complete work of similar type, scope and complexity to our current project. Limit to one page.
- **Understanding of Project & Design Considerations:** A review of your understanding of our project including: scope of work, schedule and coordination challenges, design considerations and other issues which you feel must be considered. We are also interested in any innovative approaches to design and construction which you feel we should consider. Limit to two pages.
• **Proposed Project Team Experience, Roles & Responsibilities**: A brief (one paragraph) summary of each team member’s relevant experience and proposed role on your team. Limit to two pages.

• **Fee Proposal**

Please use the following format to summarize your Fees and Reimbursable Expenses

Hourly fee not to exceed (Lump Sum) $________
Reimbursable Expenses (Allowance) $________
Total Agreement Amount $________

**IV.) THE SELECTION PROCESS**

**Criteria for Selection:**

The following criteria will be used to evaluate each proposal:

- **Qualification of the Design Firm**: demonstrated capability to successfully complete work of similar type, scope and complexity
- **Experience of The Proposed Project Team**: experience of each team member in their proposed roles and on similar projects
- **Understanding of Our Project**: demonstrates a clear understanding of the project scope, design issues and coordination requirements.
- **Understanding of UM Coordination Requirements**: understands the need to coordinate with key UM staff, departments and project team. Understands required internal review and governance requirements.

**Selection Schedule:**

<table>
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<th>Activity</th>
<th>Date</th>
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<tr>
<td>Request For Proposals (RFP) Issued:</td>
<td>Insert Date Here</td>
</tr>
<tr>
<td>Proposals Due From Design Professional:</td>
<td>Insert Date Here</td>
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<tr>
<td>Final Selection:</td>
<td>Insert Date Here</td>
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Send all proposal electronically, in PDF format, to the Project Manager listed below. Proposal time stamped as arriving after the due date and time outlined herein will not be opened or considered. Please note that proposals will not be opened in public nor will fee proposals be shared.

**University Contact**
**Contractual Issues**
Robert C. Harris, P.E.
Director
Facilities Planning and Development
Hospitals and Health Centers
Facilities Services
2101 Commonwealth, Suite B
Ann Arbor, MI 48105
Phone: (734) 763-4414
Fax: (734) 936-0156
Email: harrisc@umich.edu

**Scope Issues**
. N/A .
- - - -
Facilities Planning and Development
Hospitals and Health Centers
Facilities Services
2101 Commonwealth, Suite B
Ann Arbor, MI 48105
Phone: - - - -
Fax: (734) 647-4181
Email: - - - -

V.) ATTACHMENTS & APPLICABLE DOCUMENTS

Please find the following attachments:

Investigative Report

UMHHC Guidelines: