Request for Proposal (RFP) Planning Document for Construction Manager Projects

Instructions: Download this form and complete ALL required fields. Email completed form (as a Word document) to Purchasing Services (usp@umn.edu) along with any necessary attachment(s). The information from this form will then be used to create the RFP.

Note: Use the Document Library to ensure use of the most current version of this form (listed under the "Procurement" dropdown). Allow up to **three (3) business days** after submission of this form to process your RFP request. Questions or recommendations regarding this form should be sent to Purchasing Services (usp@umn.edu).

I. Project Information

1. **Project Name:** [Insert Project Name]

2. **Project Number:** [Insert Project Number]

3. **Project Manager / Requester:** [Insert Project Manager / Requester Name and E-mail]

4. **Assistant Project Manager (if any):** [Insert Assistant Project Manager Name and E-mail]

5. **Project Description:** [Insert a brief summary of the Project. NOTE: If it's easier to attach a separate document with the Project details, please do so and reference said document in item 7 below.]

6. **Project Architect/Engineer of Record:** [Insert Firm's name as stated on Project Manual/Drawings]

7. **Project Documents:**

   A. List of Documents: [Insert a list of RFP Documents for the Project. (Such as any Specifications, Plans, Drawings, Program, Pre-Design Documents, Feasibility Studies, Master Plan, Geotechnical Information, Hazardous Materials Analysis, etc.)
   B. Document Location: [Insert the location of these documents (E-mail, Google Drive, Drop Box, Flash Drive, etc.]

8. **Project Costs:**

   A. Total Project Budget: $[Insert dollar amount]
   B. Estimated Cost for Preconstruction: $[Insert dollar amount]
   C. Estimated Cost of Work for Construction: $[Insert dollar amount]
   D. University's identified Design Contingency: [Insert percentage]%
   E. University's identified Construction Contingency: [Insert percentage]%
   F. Are there any Alternates or Unit Prices that need to be priced with this RFP?
      I. If "Yes," identify ALL alternates/unit prices below:
         a. [Insert a list of ALL required Alternates/Unit Price]
   G. Will Project include a Material Purchasing Agent Agreement so that material purchases are exempt from sales tax?
   H. Identify ALL funding sources for this contract: [Insert ALL funding source(s) (HEAPR, R&R, Departmental, University Debt, State Bonds, Sponsored Projects, Grants, etc.]
   I. Will the Construction Contract have movable equipment?

9. **Project Schedule:**

   A. Required Date of Substantial Completion: Click here to enter a date
   B. Total duration (in months) of the actual construction period: [Insert number of months]

C. Other critical Project dates: [Insert any other critical dates that pertain to the construction schedule or any other important dates/deadlines that must be met throughout the Project]
D. Does this Project require Board of Regents' approval?
I. If "Yes," identify when Regents' approval will/did occur: [Insert Regents approval details]

10. Miscellaneous:

A. Insurance Requirements: The standard insurance requirements for University construction projects can be found in Article 11 of the AIA A201-2017 General Conditions. If you believe that this project should require different insurance limits, apply for a variance from Cory Montplaisir, the University's insurance specialist from the Risk Management Department.
I. Will this project be following the standard insurance requirements?
a. If "No," attach the revised insurance limits when submitting your RFP Planning Document.
B. All other necessary Project information: [Insert any other additional comments, notes, or information that you would like to share with potential bidders regarding the Project]

II. Schedule of Selection Process

1. Tentative Schedule of Events (Complete ONE of the following):

A. For Projects that do NOT require Interviews:

Activity	Date	Recommended Durations
RFP Available for Distribution	Click here to enter a date	Minimum of **3 business days** after receipt of RFP Planning Document
Pre-Proposal Meeting	Click here to enter a date	Minimum of **5 business days** after RFP Issue Date
Deadline for RFP Questions	Click here to enter a date	**3 - 5 business days** after Pre-Proposal Meeting
Proposal Due Date	Click here to enter a date	Minimum of **5 business days** after Last Day for Questions
Identification of Potential Awarded Respondent	Click here to enter a date	Minimum of **8 business days** after RFP Due Date
Anticipated authorization to proceed	Click here to enter a date	**3 - 5 business days** after Award Date

B. For Projects that do require Interviews:

Activity	Date	Recommended Durations
RFP Available for Distribution	Click here to enter a date	Minimum of **3 business days** after receipt of RFP Planning Document
Pre-Proposal Meeting	Click here to enter a date	Minimum of **5 business days** after RFP Issue Date
Deadline for RFP Questions	Click here to enter a date	**3 - 5 business days** after Pre-Proposal Meeting
Proposal Due Date	Click here to enter a date	Minimum of **5 business days** after Last Day for Questions

Shortlist for Interviews	Click here to enter a date	Minimum of **8 business days** after RFP Due Date
Interviews	Click here to enter a date	Minimum of **5 business days** after Shortlist for Interviews
Identification of Potential Awarded Respondent	Click here to enter a date	**1 - 2 business days** after Interview
Anticipated authorization to proceed	Click here to enter a date	**3 - 5 business days** after Award Date

2. Pre-Proposal Meeting:

A. Pre-Proposal Meeting:*
B. Time: [Insert Meeting Start Time]
C. Pre-Proposal Meeting Format:
D. In-Person Pre-Proposal Meeting:
    I. Building: [Insert Building Name]
    II. Room Number / Meeting Location: [Insert Meeting Location (Room #, Lobby, etc)]
    III. Building Street Address: [Insert Street Address (include City, State, and Zipcode)]
E. Remote Pre-Proposal Meeting:
    I. Zoom Hyperlink: [Insert Zoom Invitation Hyperlink]
    II. Zoom ID: [Insert Zoom ID #]
    III. Zoom Passcode: [Insert Zoom Passcode (if any)]
F. Other necessary information: [Insert any important information that potential bidders should know regarding the Pre-Proposal Meeting such as recommended attire, face covering mandates, hard hats, length of meeting, RSVP requirements, etc.]

* - It is recommended that you default to a Non-Mandatory Pre-Proposal Meeting unless there is a need for potential Respondents to view the project site before putting together a complete proposal.

3. Interviews:

A. The Interview:
B. Interview Time Period:** [Insert Interview Start and End Time]
C. Interview Format:
D. In-Person Interview:
    I. Building: [Insert Building Name]
    II. Room Number: [Insert Room #]
E. Remote Interview:
    I. Zoom Hyperlink: [Insert Zoom Invitation Hyperlink]
    II. Zoom ID: [Insert Zoom ID #]
    III. Zoom Passcode: [Insert Zoom Passcode (if any)]

** - It is recommended that you reserve a minimum of a four-hour block for interviews.

III. Evaluation of Proposals

1. RFP Point Values:

A. Identify your RFP point values:

Description	Point Value	Recommended Values
Respondent's Team Qualifications		30 Points

Project Schedule and Work Plan		40 Points
Project Cost		25 Points
Safety	5	5 Points
Total should add up to 100 Points		

2. Respondent's Team Qualifications:

A. Which Respondent team members would you like to evaluate for this project?

Role	Included as part of Table B-1 or B-2***
I.	
II.	
III.	
IV.	
V. [Insert other role/sub-contractor]	
VI. [Insert other role/sub-contractor]	
VII. [Insert other role/sub-contractor]	

*** - Table B-1 requests detailed information such the individual's years of service, past project experience, history with other team members, current workload, and percentage of time on project. Table B-2 requests high-level information such as name of the individual and the firm they work for.

B. Would you like Respondents to attach 1-page resumes with their Proposal?

3. Evaluation Team:

A. List ALL members of your evaluation team (Recommend between 3 – 5 people):

Name***	E-mail Address****	Department
[Insert Evaluator's Name]	[Insert Evaluator's E-mail]	[Insert Evaluator's Department]
[Insert Evaluator's Name]	[Insert Evaluator's E-mail]	[Insert Evaluator's Department]
[Insert Evaluator's Name]	[Insert Evaluator's E-mail]	[Insert Evaluator's Department]
[Insert Evaluator's Name]	[Insert Evaluator's E-mail]	[Insert Evaluator's Department]
[Insert Evaluator's Name]	[Insert Evaluator's E-mail]	[Insert Evaluator's Department]
[Insert Evaluator's Name]	[Insert Evaluator's E-mail]	[Insert Evaluator's Department]
[Insert Evaluator's Name]	[Insert Evaluator's E-mail]	[Insert Evaluator's Department]

**** - All Evaluation Team Members noted above will receive an email notification from Purchasing Services once the RFP has been issued.

IV. RFP Advertisement

1. Supplier Advertisement List:

A. Identify the areas of service that this RFP should be advertised to (choose ALL that apply):*****

- ☐ General Contractor
- ☐ Mechanical Contractor
- ☐ Demolition / Excavate / Earthwork
- ☐ Masonry / Concrete
- ☐ Elevator Contractor
- ☐ Roofing Contractor
- ☐ Electrical Contractor
- ☐ Asbestos Abatement
- ☐ Waterproofing Contractor
- ☐ Fire Sprinkler Contractor

***** - Purchasing Services will advertise this RFP to the registered suppliers in our MBid System based on the categories selected above. If there are suppliers that you recommend MUST be included on the RFP advertisement, identify those suppliers below.

Supplier Name	Supplier Contact Email Address
[Insert Supplier's Name]	[Insert Supplier's Email]
[Insert Supplier's Name]	[Insert Supplier's Email]
[Insert Supplier's Name]	[Insert Supplier's Email]
[Insert Supplier's Name]	[Insert Supplier's Email]
[Insert Supplier's Name]	[Insert Supplier's Email]

[Insert Name]
Name of Person Submitting This Form

[Insert Date]
Date