



Pennsylvania
Department of General Services

Request for Proposal

for

**Strategic Facility Planning
Consulting Services**

for the

Department of Human Services

RFP No. DGS 2026-DHS-SFP-1

Josh Shapiro
Governor

Sandra Aguilera
Acting Secretary of General Services

2026

NOTICE TO PROPOSERS

The following Consulting Service is being released utilizing the Request for Proposal Contracting Method of Procurement by the Department of General Services (DGS or Department), where DGS will consider technical qualifications and Small Diverse Business and Veteran Business Enterprise participation.

Proposals received by the Department of General Services after the Proposal Submission Deadline will be rejected. It is the responsibility of each Proposer to ensure that their proposal is received by the Department of General Services prior to the Proposal Submission Deadline, regardless of method of delivery used. However, Trimble Unity Construct (formerly e-Builder, hereinafter referred to as "Trimble") is not to be used to submit any part of your Proposal.

Proposals delivered in person by the Proposer or through an authorized representative will be received by the Request for Proposal Coordinator from individuals presenting picture identification on behalf of the Proposer.

PROJECT INFORMATION

Project	DGS C-0021-P001
Project Location:	Statewide
Agency:	Department of Human Services
Brief Description:	This Request for Proposal is to retain a Strategic Facility Planning Consultant to develop an agency-specific Strategic Facility Plan for the Department of Human Services.
Pre-Proposal Conference:	THE PRE-PROPOSAL CONFERENCE WILL BE HELD: Thursday, October 22, 2026, at Selinsgrove Center, 1000 U.S. Route 522, Selinsgrove, PA 17870 and Friday, October 23, 2026 at Danville State Hospital, 50 Kirkbride Dr, Danville, PA 17821. All proposers who have secured solicitation documents are invited and urged to attend this Pre-Proposal Conference.
Request for Proposal Coordinator / Issuing Office:	Susan Stanisic Department of General Services 3rd Floor Arsenal Building 1800 Herr Street Harrisburg, PA 17103 Phone: 717-783-3273 Email: sstanisic@pa.gov
Contract Number:	DGS 2026-DHS-SFP-1

Bid Guaranty:	Not required.
Contract Duration:	785 Calendar Days (estimate subject to final negotiations)
Proposal Period:	90 days estimated from Proposal submission deadline until Notice of Selection.
List of Proposers:	List of Potential Proposers along with Proposal Results can be found at: www.dgs.pa.gov > Businesses > Design & Construction > Bidding

SDB AND VBE PARTICIPATION GOALS

	SDB GOAL	VBE GOAL
Strategic Facility Planning Consulting Services	20%	3%

CALENDAR OF EVENTS

Activity	Date
Notice to Proposers / Issue RFP	October 13, 2026
Pre-Proposal Conference	October 22, 2026 October 23, 2026
BDISBO SDB / VBE Presentation	October 26, 2026
Deadline to Submit Questions	November 2, 2026
Deadline to Issue Addenda Amending the RFP	November 9, 2026
Proposal Submission Deadline	November 24, 2026

MANDATORY Vendor Registration: All Proposers must have a Current and Active Vendor Number. Proposal Documents require Proposers to provide this number. Register at www.pasupplierportal.state.pa.us.

Trimble Unity Construct Enterprise Software (formerly e-Builder and hereinafter referred to as "Trimble"): Proposers are required to create a user profile within Trimble by clicking on the Advertisement located in PA e-marketplace at www.emarketplace.state.pa.us. A video tutorial is available on the Trimble site for first time users to learn how to Navigate Trimble. Technical support is also available via email at support@e-builder.net or by phone at 1.888.288.5717.

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PART 1

GENERAL INFORMATION FOR PROPOSERS

- 1-1 PURPOSE.** This Request for Proposals (RFP) provides interested Proposers with information to enable them to prepare and submit a proposal consisting of **two separately sealed packages: 1) Technical Submittal, and 2) Small Diverse Business and Veteran Business Enterprise Participation Submittal (along with the required documentation as set forth within the Small Diverse Business and Veteran Business Enterprise Participation Packets)** for consideration by the Commonwealth of Pennsylvania (Commonwealth) for Strategic Facility Planning (SFP) Consulting Services.

This RFP contains instructions governing the requested proposals, including the requirements for the information and material to be included; a description of the service to be provided; requirements which Proposers must meet to be eligible for consideration; general evaluation criteria; and other requirements specific to this RFP.

- 1-2 ISSUING OFFICE.** This RFP is issued for the Commonwealth by the Department of General Services' Capital Programs Deputate. The Request for Proposal Coordinator (RFP Coordinator) is the sole point of contact in the Commonwealth for this RFP.

All correspondence concerning this RFP shall be directed to the RFP Coordinator and shall be titled 'Strategic Facilities Planning Consulting Services'.

- 1-3 SCOPE.** The general scope of services encompassed under this RFP consists of the SFP consulting services including, but not limited to, understanding the organization's operations, business objectives, existing facilities and projected future capacities and needs, aligning their facility needs with their current and future business needs, and guiding future facility project development. The complete scope of services is further described in Part 4 of this RFP.

- 1-4 CONTRACT INFORMATION.** If a contract is entered into as a result of the RFP process, it will be an Agreement for Strategic Facility Planning Consulting Services, including the Contract Documents (all attached to this RFP as Appendices).

This Agreement for Strategic Facility Planning Consulting Services will encompass the costs for any and all SFP consulting services necessary for the project described in the Contract Documents. The successful Proposer will become the Strategic Facility Planning Consultant (SFP Consultant).

No contract exists until all signatures required by law are affixed to the contract.

Note, the SFP Consultant selected to provide SFP consulting services, or any of their affiliates or subconsultants, is prohibited from providing any work or services (e.g., design, construction management, construction, etc.) on any future project which resulted from the SFP Consultant's work.

- 1-5 OWNER'S RIGHTS RESERVED.** The Commonwealth reserves the right to cancel or withdraw this RFP in whole or in part any time prior to full execution of the contract. DGS reserves the right to reject any and all proposals received as a result of this RFP. DGS may, in its discretion, waive any informality or technical deficiencies in proposals. DGS reserves the right to request additional or clarifying information, to schedule presentations, and to conduct interviews with any or all Proposers. In addition, DGS reserves the right to negotiate with the successful Proposer.
- 1-6 INCURRING COSTS.** The Commonwealth is not liable for any costs incurred by Proposers in preparing, delivering, or submitting any proposals for the RFP or in anticipation of award of the contract.
- 1-7 PRE-PROPOSAL CONFERENCE.** A Pre-Proposal Conference will be scheduled.
- 1-8 CLARIFICATION TO THE RFP.** If there are any technical questions, requests for information, requests for clarification, or requests for data, the questions shall be submitted through Trimble Unity Construct (formerly e-Builder, hereinafter referred to as "Trimble") prior to the deadline set forth in the Calendar of Events for questions. If the Issuing Office deems it necessary to revise or clarify any part of this RFP or its Appendices, the RFP Coordinator will issue addenda in Trimble recording the revision or clarification. The complete addenda will only be available in Trimble. These addenda will become part of this RFP. By submitting a Proposal, the Proposer acknowledges the receipt of all addenda issued for this project and that they have read and understood them. DGS will not issue any addendum later than indicated in the RFP Calendar of Events, unless DGS cancels or extends the Proposal Submission Deadline.

A written addendum issued by DGS through Trimble is the only binding amendment/revision to this RFP and no other form of amendment/revision, either written or oral, will be considered binding by DGS. Proposers shall not rely on information other than written addenda issued by DGS.

- 1-9 PROPOSAL SUBMISSION DEADLINE.** To be considered for selection by DGS, proposals must be delivered to the RFP Coordinator at the address listed in the Notice to Proposers on or before the Proposal Submission Deadline. The Proposal or any part of it shall not be submitted through Trimble. Proposers who mail proposals should allow sufficient mail delivery time to ensure timely receipt of their proposals and are encouraged to use a delivery service (FedEx, UPS, DHL, etc.) to ensure the proposal is sent directly to the Issuing Office. If, due to inclement weather, natural disaster, or any other cause, the Commonwealth is closed on the Proposal Submission Deadline, the deadline for submitting proposals shall be automatically extended until the next Commonwealth business day (time of day to remain as specified in the Notice to Proposers) on which the Commonwealth is open, unless Proposers are notified otherwise by DGS.

The Proposer shall be solely responsible for assuring that the proposal arrives prior to the Proposal Submission Deadline. Proposals delivered after the Proposal Submission Deadline, regardless of the reason for lateness, will automatically be rejected and returned unopened to the Proposer.

- 1-10 PROPOSALS.** To be considered by DGS, a Proposer must meet the Mandatory Requirements of this RFP and should also submit a complete response to this RFP, using the format provided in Part 2. Proposals must be signed by an official authorized to bind the Proposer to its provisions. By submitting a proposal, the Proposer acknowledges that it has carefully reviewed this solicitation and agrees to comply with all applicable conditions and requirements. The contents of the proposal of the successful Proposer, which do not conflict with this RFP and its Appendices, will become contractual obligations if a contract is entered into by DGS. The proposal shall remain valid and binding for at least 90 days from the Proposal Submission Deadline, or until a contract has been fully executed. If the Issuing Office selects the Proposer's proposal for award, the contents of the selected Proposer's proposal will become, except to the extent the contents are changed through Best and Final Offers or negotiations, contractual obligations.

- 1-11 DISCUSSIONS.** The proposals will be evaluated and scored as described in detail in this RFP. The RFP Coordinator will schedule separate discussions between the top three scoring Proposers and the Evaluation Committee members.

- 1-12 WITHDRAWAL OF PROPOSAL.** Proposals may be withdrawn by written request, which shall be received by the RFP Coordinator prior to the Proposal Submission Deadline. A proposal may also be withdrawn in person by the Proposer or its authorized representative, provided their identity is made known and he/she signs a receipt for a proposal, but only if the withdrawal is

made prior to the Proposal Submission Deadline. A proposal may only be modified by the submission of a new sealed proposal or submission of a sealed modification received by the RFP Coordinator prior to the Proposal Submission Deadline.

- 1-13 ALTERNATE OR CONDITIONAL PROPOSALS.** The Issuing Office has identified the basic approach to meeting its requirements, allowing Proposers to be creative and propose their best method of meeting these requirements. The Issuing Office reserves the right to reject a Proposal if it shows any omission, alterations of form, scope of work, additions or deductions not called for, conditional language or uninvited bids, or irregularities of any kind.
- 1-14 CONTACT FOR CLARIFICATION.** Proposers that submit proposals may be required to make a written clarification of the proposals to the Issuing Office to ensure thorough mutual understanding and Proposer responsiveness to the solicitation requirements. The Issuing Office will handle any requests for clarification.
- 1-15 SFP CONSULTANT RESPONSIBILITIES.** The contract will require the selected Proposer to assume responsibility for all services offered in its proposal whether it produces them itself or by subcontract. The Issuing Office will consider the selected Proposer to be the sole point of contact with regard to contractual matters. During the procurement stage, the Proposer has an affirmative duty to review the Contract Documents. If the Proposer does not request a clarification during the procurement stage with regard to discrepancies within the Contract Documents, the Proposer may not submit a claim after award of contract alleging insufficient data, ambiguity in the documents, incorrectly assumed conditions or misunderstanding.
- 1-16 BASIS OF COMPENSATION.** Once a Proposer is selected for contract negotiations, DGS will negotiate a Lump Sum amount for the Proposer's basic services. Additional Services may be compensated on either a lump-sum or a not-to-exceed basis which includes maximum hourly rates and reimbursables.

Additional Services compensation for the SFP Consultant and subconsultants shall be based on each individual employee's hourly rate times a maximum multiplier of 3.0 up to the established maximum hourly rate allowed for each labor category listed above. The total labor multiplier includes labor overhead, general and administrative overhead, and profit. Refer to the Agreement for Strategic Facility Planning Consulting Services (Agreement) for the maximum hourly rates allowed for each labor category. These are the maximum billing rates for the staff positions listed in each

category and cannot be exceeded. See the Agreement for permitted reimbursable expenses.

1. **Partner and Principal Billing Rates.** Partners and Principals are considered part of home office overhead and as such do not have separate billing rates. If a partner or principal participates on the project, their hourly rate will be commensurate with the hourly rate for the employee category in which the partner or principal is functioning.
2. **Markup on Subconsultants.** The Proposer will not add any markup to the cost of each subconsultant.
3. **Overtime.** Overtime is defined as more than 40 hours in a week. SFP Consultant staff and subconsultants are expected to assign personnel and complete tasks during normal working hours without overtime. With DGS' prior written approval, overtime hours may be billed for short periods to recover from an unplanned delay, if required to maintain schedule or other reason pre-approved by the Department. Salaried personnel shall not be billed for more than eight (8) hours per day. The billing rate for overtime billed to the Commonwealth will not be increased, regardless of whether the employee or consultant is paying their employee for premium time, time and a half, double time, etc.

1-17 BEST AND FINAL OFFERS

1. While not required, the Issuing Office reserves the right to conduct discussions with Proposers for the purpose of obtaining "best and final offers." To obtain best and final offers from Proposers, the Issuing Office may do one or more of the following, in any combination and order:
 - a. Schedule oral presentations;
 - b. Request revised proposals;
 - c. Request Non-Binding Fee Proposals;
 - d. Enter into pre-selection negotiations.
2. The following Proposers will not be invited by the Issuing Office to submit a Best and Final Offer:
 - a. Those Proposers which the Issuing Office has determined to be not responsible or whose proposals the Issuing Office has determined to be not responsive.
 - b. Those Proposers, which the Issuing Office has determined, from the submitted information, do not possess the experience or qualifications to assure good faith performance of the contract.

- c. Those Proposers whose score for their technical submittal of the proposal is less than 75% of the total amount of technical points allotted to the technical criterion.

The Issuing Office may further limit participation in the best and final offers process to those remaining responsible Proposers which the Issuing Office has, within its discretion, determined to be within the top competitive range of responsive proposals.

3. The Technical Evaluation Criteria found in Section 2-4, shall also be used to evaluate the Best and Final offers.

1-18 DISCLOSURE OF PROPOSAL CONTENTS

1. **Confidential Information.** The Commonwealth is not requesting, and does not require, confidential proprietary information or trade secrets to be included as part of Proposers' submissions in order to evaluate proposals submitted in response to this RFP. Accordingly, except as provided herein, Proposers should not label proposal submissions as confidential or proprietary or trade secret protected. Any Proposer who determines that it must divulge such information as part of its proposal must submit the signed written statement described in Subsection 3 below and must additionally provide a redacted version of its proposal, which removes only the confidential proprietary information and trade secrets, for required public disclosure purposes.
2. **Commonwealth Use of Proposal Contents.** All material submitted with the proposal shall be considered the property of the Commonwealth of Pennsylvania and may be returned only at the Issuing Office's option. The Commonwealth has the right to use any or all ideas not protected by intellectual property rights that are presented in any proposal regardless of whether the proposal becomes part of the contract. Notwithstanding any Proposer copyright designations contained on proposals, the Commonwealth shall have the right to make copies and distribute proposals internally and to comply with public record or other disclosure requirements under the provisions of any Commonwealth or United States statute or regulation, or rule or order of any court of competent jurisdiction.
3. **Public Disclosure.** After the award of a contract pursuant to this RFP, all proposal submissions are subject to disclosure in response to a request for public records made under the Pennsylvania Right-to-Know-Law, 65 P.S. §67.101, et seq. If a proposal submission contains confidential proprietary information or trade secrets, a signed written statement to this

effect must be provided with the submission in accordance with 65 P.S. §67.707(b) for the information to be considered exempt under 65 P.S. §67.708(b)(11) from public records requests. Financial capability information submitted with this RFP is exempt from public records disclosure under 65 P.S. § 67.708(b) (26).

1-19 NEWS RELEASES. All news releases and media contacts regarding this project will be made only by DGS, unless DGS directs otherwise in specific instances. Proposer(s) shall not initiate news releases or media contact without prior written permission of the DGS. This paragraph does not apply to any advertisement soliciting interested subcontractors made by the Proposer during the preparation of the proposal.

1-20 RESTRICTION OF CONTACT. From the issue date of this RFP until the date of the Notice of Selection / Selected for Negotiation letters, all contacts with Commonwealth personnel concerning this RFP, proposals and the evaluation process must be approved through the Request for Proposal Coordinator. Any violation of this condition is cause for the Commonwealth to reject the Proposer's proposal. If it is later discovered that any violations have occurred, the Commonwealth may reject any proposal or rescind any contract awarded pursuant to this RFP.

Proposers agree to make no other distribution of any part of their proposal beyond that made to the Request for Proposal Coordinator. A Proposer who shares information contained in their proposal with other Commonwealth personnel and/or competing Proposer's personnel may be subject to disqualification.

1-21 NOTIFICATION OF SELECTION

1. **Contract Negotiations.** The Issuing Office will notify all Proposers in writing of the Proposer selected for contract negotiations after the Issuing Office has determined, taking into consideration all of the evaluation factors, the proposal that is the most advantageous to the Issuing Office.
2. **Award.** Upon successful completion of negotiations, DGS shall issue written notification of its selection for award to the responsible Proposer whose proposal is determined to be the most advantageous to the Commonwealth in accordance with the evaluation factors, procedures, and criteria set forth in this RFP. Proposers whose proposals are not selected will be notified when contract negotiations have been successfully completed and the Issuing Office has received the final negotiated contract signed by the selected Proposer.

3. **Posting.** Upon the Issuing Office receiving the final negotiated contract signed by the selected Proposer, DGS will post the following information on the DGS website:
 - a. The successful Proposers' Technical Submissions (in .pdf format)
 - b. The successful Proposers' Small Diverse Business and Veteran Business Enterprise Participation Submissions
 - c. All Proposers' Proposal Score Summary with the successful Proposers' identity only (Technical Submission Score)

1-22 DEBRIEFING OF NON-RESPONSIBLE AND UNSUCCESSFUL PROPOSERS. DGS will notify in writing all Proposers deemed non-responsible of their opportunity for a debriefing and the timeframe for this optional debriefing. Upon notification of award (see Section 1-21.2), Proposers whose proposals were not selected will be given the opportunity to be debriefed. Any Proposer who wants to be debriefed must email a request to the RFP Coordinator within two (2) calendar days of the date the non-responsible Proposers receive their notice of rejection or the unsuccessful Proposers receive their notice of non-selection. DGS will hold a debriefing conference for each unsuccessful Proposer who submitted a written request for such a conference within five (5) calendar days of receipt of notice of a request for a debriefing but no later than seven (7) calendar days from the date of Notice of Selection. The RFP Coordinator will hold the debriefing conference and will discuss only the strengths and weaknesses of the proposal of the Proposer being debriefed. The Proposer may request to be debriefed by phone. The RFP Coordinator will not take any notes during the debriefing.

The timeframe for debriefing of non-responsible and unsuccessful Proposers neither extends nor modifies in any way the deadlines for the RFP Protest Procedure set forth herein. If a Proposer exercises its opportunity to be debriefed, this shall not constitute or toll the filing of an RFP protest.

1-23 TERM OF CONTRACT. The term of contract is the Contract Duration listed in the Notice to Proposers and will commence on the Effective Date of the contract. The Effective Date occurs on the date of the last Commonwealth signature. The selected Proposer shall not start the performance of any work prior to the Effective Date. The Commonwealth shall not be liable to pay the selected Proposer for any service or work performed or expenses incurred before the Effective Date.

1-24 RFP PROTEST PROCEDURE. In addition to the summary provided herein, the Protest Procedure is available in the Procurement Code (62 Pa. C.S. § 1711.1). Proposers are advised to download the Protest Form which is available in Trimble under the Bid Documents tab in the Invitation to Bid for the project.

1. **Who may file** – Any Proposer or Prospective Proposer who is aggrieved in connection with the RFP or the award of a contract resulting from the RFP may file a protest.
 - a. Prospective Proposer – is an entity that has not submitted a proposal in response to the RFP.
 - b. Proposer – is an entity that has submitted a proposal in response to the RFP.
2. **Time limits**
 - a. If a protest is filed by a Prospective Proposer, it must be filed, in writing, with the RFP Coordinator prior to the Proposal Submission Deadline by e-mail or regular mail.
 - 1) **E-Mail.** Prospective Proposers may complete and submit a Protest Form. The Form is available under the Bid Documents tab in the Invitation to Bid for the project. The Form, along with any supporting documentation, must be e-mailed, as indicated on the Protest Form.
 - 2) **Mail.** Prospective Bidders may file a protest, in writing, with the Issuing Office, Department of General Services, 3rd Floor Arsenal Building, 1800 Herr Street, Harrisburg, PA 17103.
 - b. If a protest is filed by a Proposer, it must be filed, in writing, with the RFP Coordinator within seven (7) days after the protesting Proposer knew or should have known of the facts giving rise to the protest except in no event may a protest be filed later than 7 days after the Notice of Selection is posted on the DGS website. Proposers must file protests by either:
 - 1) **E-Mail.** Proposers may complete and submit a Protest Form. The Form is available in Trimble under the Bid Documents tab in the Invitation to Bid for the project. The Form, along with any supporting documentation, must be e-mailed, as indicated on the Bid Protest Form to Trimble, or
 - 2) **Mail.** Protest may be filed, in writing, with the Issuing Office, Department of General Services, 3rd Floor Arsenal Building, 1800 Herr Street, Harrisburg, PA 17103.
 - c. “Filed” is defined as the date upon which the Protest Form is submitted via e-mail to Trimble or, if a written protest is filed, the date upon which the Department receives the written protest.
 - d. If the Proposer fails to file/submit a bid protest or files/submits an untimely protest, then the Proposer shall be deemed to have waived the right to protest the solicitation or award of the contract in any forum. Untimely protests will be disregarded by the Department.

3. The Department may cancel a Request for Proposal or may reject all proposals at any time prior to the time a contract is executed by all parties when it is in the best interests of the Commonwealth. The Proposer may not submit a protest relating to cancellation of the solicitation or rejection of all bids.
4. A protest shall state all grounds upon which the protestant asserts that the solicitation or award of the contract was improper. The protestant may submit with the protest any documents or information it deems relevant to the protest.

1-25 JOB POSTING. The SFP Consultant and all subconsultants are encouraged to post jobs created by this project or jobs they seek to fill, to the PaCareerLink system at www.cwds.pa.gov.

The SFP Consultant and subconsultants can locate their local PA Career Link office through the same website. Staff at local PA Career Link can assist employers to post positions and explain how to retrieve resumes or applications generated by their systems.

END OF PART 1

PART 2

PROPOSAL FORMAT AND REQUIRED INFORMATION

- 2-1. PROPOSAL SUBMISSION.** The RFP is intended to provide interested Proposers with the basic information necessary to evaluate the SFP consulting services scope and requirements. Each Proposer shall develop an independent assessment of the SFP consulting services that shall form a suitable basis for their respective proposal. Each proposal should be a complete response to the RFP, following the format described in this RFP. Proposals shall be straightforward, concise presentations. Proposers shall include information for all items requested in the RFP as completely and accurately as possible. By submitting a proposal, the Proposer agrees to the terms and conditions as stated in this RFP.

A proposal should be submitted in the format discussed below and submitted to the RFP Coordinator. To be considered by DGS, the proposal shall be responsive and responsible and respond to all requirements in this part of the RFP. Each proposal shall consist of the following three (3) separate parts (submitted in two (2) separately sealed envelopes as described in Section 2-3):

- 1. Technical Submittal.**
- 2. Small Diverse Business (SDB) Participation Submittal** (which must include either the SDB Utilization Schedule, the Good Faith Efforts Documentation to Support Waiver Request, or both) and
- 3. Veteran Business Enterprise (VBE) Participation Submittal** (which must include either the VBE Utilization Schedule, the Good Faith Efforts Documentation to Support Waiver Request, or both).

DGS will reject as non-responsive any submission that is not submitted and properly separated as described in this RFP.

The Commonwealth reserves the right to request and to evaluate additional information from secondary sources (such as a Dun & Bradstreet report) which, in the Commonwealth's opinion, is necessary to assure that the Proposer's competence, number of qualified employees, business organization and financial resources are adequate to perform according to the contract.

The Commonwealth may make such investigations as deemed necessary to determine the ability of the Proposer to perform the Contract Work. The Proposer shall furnish to the Commonwealth all such information and data for this purpose as requested by the Commonwealth. The Commonwealth reserves the right to reject any proposal as non-responsive if the evidence

submitted by, or investigation of, such Proposer fails to satisfy the Commonwealth that such Proposer is properly qualified to carry out the obligations of the Contract and to complete the Contract Work.

2-2. MANDATORY PROPOSAL REQUIREMENTS. To qualify for evaluation, each proposal must, as applicable, include or meet the mandatory items listed on the Requirements Checklist provided as an Appendix to the RFP. Any proposal that does not comply with these listed mandatory requirements will be rejected as non-responsive.

2-3. PROPOSAL FORMAT. The proposal shall consist of three (3) separate parts and shall be submitted in two (2) separately sealed envelopes or packages clearly labeled as 1) Technical Submittal; and 2) SDB Participation Submittal (which must include the SDB Utilization Schedule, the Good Faith Efforts Documentation to Support Waiver Request, or both) **and VBE Participation Submittal** (which must include the VBE Utilization Schedule, the Good Faith Efforts Documentation to Support Waiver Request, or both). No part of the Proposal or Submission is to be submitted through Trimble Unity Construct (formerly e-Builder, hereinafter referred to as "Trimble"). The submittals shall be in the following format:

1. The 'Technical Submittal' package/envelope shall include:
 - a. Four (4) Flash Drives each containing the Technical Submittal submitted in a PDF format, and each clearly labeled with the Proposer's name and 'Technical Submittal'
 - b. One (1) paper document of the Proposal Signature Page (provided as an Appendix to this RFP), with original signatures.
 - c. One (1) notarized original paper document of the Non-Collusion Affidavit (provided as an Appendix to this RFP), with original signatures.
2. The 'Small Diverse Business (SDB) and Veteran Business Enterprise (VBE) Participation Submittal' package/envelope shall include:
 - a. Two (2) Flash Drives containing the following:
 - 1) SDB Participation Submittal (which must include the SDB Utilization Schedule, the Good Faith Efforts Documentation to Support Waiver Request, or both) (provided as an Appendix to this RFP); and
 - 2) VBE Participation Submittal (which must include the VBE Utilization Schedule, the Good Faith Efforts Documentation to Support Waiver Request, or both) (provided as an Appendix to this RFP).

The label on each separately sealed package should include the Proposer's name, address, contact person (phone number and email), and project

information, including the contract number for which the proposal is being submitted, as described in Part I of this RFP.

3. The Proposer should submit a cover letter in the Technical Submittal package providing, at a minimum, the following information:
 - a. Company name
 - b. Company mailing address
 - c. Contact person
 - d. Contact person's phone number and e-mail address

2-4. TECHNICAL SUBMITTAL REQUIREMENTS. To be responsible, a Proposer must submit a responsive proposal and possess the capability to fully perform the project requirements in all respects and the integrity and reliability to assure good faith performance of the project. In order for a Proposer to be considered responsible for this RFP and eligible for a discussion and possibly selected for negotiations, the Proposer's Technical Submission points from the Evaluation Committee must be greater than or equal to 75% of the available technical points. If the Proposer does not achieve at least 75% of the points, they will be deemed non-responsive and rejected.

Proposers shall not include cost information for this project in the Technical Submittal. If cost information for this project (including, but not limited to, man-hour rates, subcontract dollar values or total proposal value) is revealed in the Technical Submittal, the proposal may be rejected as non-responsive. Cost information for other projects that the Proposer worked on, including project budgets and actual costs, may be included in the Technical Submittal. Small Diverse Businesses and Veteran Business Enterprises may be identified as such in the Technical Submittal, so long as no cost information is revealed.

The Technical Submission shall include the sections immediately following (2-4.1 through and including 2-4.3). The Issuing Office strongly recommends Proposers provide concise responses that adhere to suggested number of pages and present the requested information in the order listed below.

2-4.1 SFP Consultant Team Overview (suggested maximum of (8) pages plus (1) 11x17 page for organization chart):

1. Provide an SFP Consultant Team organization chart that graphically depicts the hierarchy and reporting structure of the team members, with specific personnel identified.
 - a. Personnel identified should include, as practical, project executives, project managers, planners, etc.
 - b. Provide personnel qualifications under 'Qualifications' below.

2. Provide a brief description of your management structure for the overall SFP Consultant Team and their prior experience, if any, working together. The Proposer shall include, at a minimum, a brief narrative on the following items for each firm on the SFP Consultant Team as appropriate:
 - a. Clearly identify the SFP Consultant Team personnel along with their role, responsibilities, and level of participation on the project.
 - b. Describe any history of working relationship between team members, including subconsultants.
 - c. Describe the SFP Consultant Team's experience with Strategic Facility Planning.
 - d. Describe the SFP Consultant Team's experience with facilitation of stakeholder workshops and meetings and its ability to manage communications effectively to leverage stakeholder input and establish consensus driven goals and objectives and to define successful outcomes.
3. State why the proposed management structure will best serve the interests of the project.

In order to maintain continuity throughout the project, the Proposer shall not alter the SFP Consultant Team identified in the Proposal at any time without prior written permission by DGS.
4. Describe how the SFP team is structured and distributed to most effectively and efficiently carry out the project on a Commonwealth-wide basis.

2-4.2 Understanding the Objectives (suggested maximum of (10) pages plus (2) 11x17 pages for project schedule):

The Proposer shall describe its technical plan for producing a Strategic Facility Plan. Outline and describe the steps necessary to successfully undertake the project from the Effective Date of the contract through completion. Specifically:

1. Demonstrate the SFP Consultant Team's understanding of the strategic facility planning process.
2. Describe how the SFP Consultant Team will educate and gain buy-in from all project stakeholders on the importance of strategic facility planning.
3. Demonstrate the SFP Consultant Team's understanding of the scope of services broken down by the five (5) phases outlined in Part 4 of the RFP. Include suggested changes or enhancements to the scope of services to customize the process to better serve DGS and the Client Agency.

4. Describe the SFP Consultant Teams understanding of and experience with different analysis tools such as, Scenario Planning, SWOT and Gap Analysis, Benchmarking, Systematic Layout Planning (SLP), etc., identifying the tools most likely to provide benefit to this project that they intend to employ.
5. Provide a preliminary project schedule identifying anticipated milestones, tasks, deliverables, and meetings in each of the five (5) phases outlined in Part 4 of the RFP.
6. Describe how the SFP Consultant Team will communicate with the project stakeholders and present the planning data/results concisely and effectively.
7. Describe challenges or issues encountered on past projects and how the SFP Consultant Team successfully addressed them.
8. Describe how the SFP Consultant Team will manage the various project stakeholders and encourage input and participation.
9. Describe how the SFP Consultant Team will work with DGS to develop standardized processes and procedures.

2-4.3 Qualifications

1. SFP Consultant Team's Qualifications (suggested maximum of (10) pages)

Provide clear and concise information that will demonstrate the following qualifications:

- a. SFP Consultant Team's experience developing strategic facility plans for government agencies.
 - 1) Include at least one (1), but not more than three (3) projects. Provide dates, locations, client name/contact, and a description of the services provided. Complete and incomplete projects may be submitted.
- b. SFP Consultant Team's experience developing strategic facility plans for large multi-building campuses used for psychiatric care, intellectual disabilities, and/or juvenile justice programs.
 - 1) Include at least one (1), but not more than three (3) projects. Provide dates, locations, client name/contact, and a description of the services provided. Complete and incomplete projects may be submitted.
- c. SFP Consultant Team's experience using and/or working with IBM TRIRIGA software.
 - 1) Discuss the methodology employed for data collection and subsequently detail the process by which the data was incorporated into the owner's software.

- 2) If the SFP Consultant Team does not have any experience with IBM TRIRIGA, identify experience with similar software.
- d. SFP Consultant Team's experience with facility condition assessments.
 - 1) Discuss how facility condition assessments integrate with the strategic facility planning process. Include at least one (1) example of how the SFP process dictated the level of assessments performed.
 - 2) Describe the levels of facility condition assessments the team is capable of providing, identifying the level or levels suitable for this study and defining the proposed levels of effort suitable for each respective type of building use.
- e. SFP Consultant Team's Statement of Readiness and Commitment of Resources.
 - 1) Provide a written statement confirming the persons identified in the Proposal are available and will be committed to the project for the time period required. Note, the "Entity's Commitment of Resources" shall be as of the date of the Technical Submission.
2. **SFP Consultant Team's Personnel Qualifications (suggested (8) person limit)**

While Executive and General Management Personnel can be included, it is more important to provide information on the staff that will be providing the bulk of the effort on the project.

The proposer shall provide clear and concise information that will demonstrate the following qualifications of the SFP Consultant Team's personnel, including subconsultants.

Provide the following for the assigned personnel:

- a. Name
- b. Title with SFP firm or subconsultant firm (must comport with billing rates stated in Appendix A)
- c. Assignment for this project
- d. Registration/Certification (list all)
- e. Education
- f. Years with firm
- g. Years with other firms
- h. Projects from Section 2-4.3.1 person was involved with including specific project role.
- i. Familiarity with IBM TRIRIGA or similar software.
- j. Other project experience.

3. Available Resources (suggested maximum of (2) pages)

Proposer shall provide information showing additional in-house resources and support available, but not anticipated to be assigned to the project.

Provide the following information for these available resources:

- a. Office location
- b. Office Manager name and contact information
- c. Total Number of Employees (list by full time part time/seasonal/contract)
- d. Personnel by discipline

4. Task Breakdown (suggested maximum of (4) pages or (2) 11x17 pages)

Proposer shall provide a breakdown showing the tasks and man-hours anticipated for the project.

2-5. SMALL DIVERSE BUSINESS AND VETERAN BUSINESS ENTERPRISE PARTICIPATION SUBMITTAL REQUIREMENTS. Failure to include the SDB Participation Submittal (which must include the SDB Utilization Schedule, the Good Faith Efforts Documentation to Support Waiver Request, or both) and the VBE Participation Submittal (which must include the VBE Utilization Schedule, the Good Faith Efforts Documentation to Support Waiver Request, or both) will result in rejection of the Proposal as non-responsive. The Proposer will not be given an opportunity to supply an SDB Participation Submittal or a VBE Participation Submittal after the Proposal Submission Date.

All Proposers are required to submit two (2) Flash drives of the SDB Participation Submittal along with associated required documentation and two (2) Flash drives of the VBE Participation Submittal along with associated required documentation. The submittals must be sealed together in their own envelope/package, separate from the remainder of the Proposal and must be provided on the SDB Participation and VBE Participation forms.

- 1. SDB and VBE Participation Goals.** The Issuing Office and Bureau of Diversity, Inclusion and Small Business Opportunities (BDISBO) have set an SDB Participation Goal and a VBE Participation Goal for this RFP which are listed on the Notice to Proposers under Project Information. The SDB and VBE Participation Goals were calculated based upon the market availability of SDBs and VBEs for work scopes identified for this solicitation and possibly an assessment of past performance of similar work.
- 2. SDB Participation Submittal, Appendix C.** The SDB Participation Submittal and associated required documentation shall be submitted in accordance with the Instructions for Completing SDB Participation

Submittal and SDB Utilization Schedule and shall be submitted in accordance with Paragraph 2-3 in Part 2.

3. **VBE Participation Submittal, Appendix D.** The VBE Participation Submittal and associated required documentation shall be submitted in accordance with the Instructions for Completing VBE Participation Submittal and VBE Utilization Schedule and shall be submitted in accordance with Paragraph 2-3 in Part 2.

NOTE: Equal employment opportunity and contract compliance statements referring to company equal employment opportunity policies or past contract compliance practices do not constitute proof of SDB or VBE Status or entitle a Proposer to receive credit towards the SDB or VBE participation goals.

4. **Contract Requirements:**

- a. **SDB and VBE Participation Documents.** All documents completed and submitted by the selected Proposer in connection with its SDB Participation Submittal (including the SDB Participation Submittal, SDB Utilization Schedule, and any Good Faith Efforts Documentation to Support Waiver Request of SDB Participation Goal) and its VBE Participation Submittal (including the VBE Participation Submittal, VBE Utilization Schedule, and any Good Faith Efforts Documentation to Support Waiver Request of VBE Participation Goal) shall be considered a part of the Contract and will be expressly incorporated into the Contract.
- b. **Subcontract Requirements.**
 - 1) The selected Proposer and each SDB or VBE must enter into a final, definitive subcontract agreement signed by the SFP Consultant and the SDB or VBE.
 - 2) In addition to any requirements in the Project's Contract Documents, the subcontract must contain:
 - i. The specific scope of services the SDB or VBE will perform; location for work performed; and the timeframe during the contract when the work will be provided or performed;
 - ii. The amount the SDB or VBE is to be paid;
 - iii. Payment terms indicating that the SDB or VBE will be paid for work satisfactorily completed within 14 calendar days of the SFP Consultant's receipt of payment from the Commonwealth for such work. Subcontractors are encouraged to utilize electronic payment methods; and
 - iv. Commercially reasonable terms for the applicable business/industry that are no less favorable than the terms of

the SFP Consultant's contract with the Commonwealth and that do not place disproportionate risk on the SDB or VBE relative to the nature and level of the SDB's or VBE's participation in the contract.

- 3) If an SDB or VBE subcontract agreement fails to incorporate the Subcontract Requirements above or those in the Project's Contract Documents, the SFP Consultant must correct such deficiency or this failure may constitute grounds for default of the SFP Consultant by the Department.
 - 4) The SFP Consultant must submit in Trimble a copy of every subcontract with an SDB or VBE, prior to the commencement of any work by the subcontractor, for BDISBO's compliance requirements.
- c. **Utilization Reports.** The SDB/VBE payment information submitted in the Department's Compliance Management Software will be used to track and confirm the actual dollar amount paid to SDB/VBE subcontractors and will serve as a record of fulfillment of the contractual commitment. The SFP Consultant shall submit updated SDB/VBE payment information in the Department's Compliance Management Software at least every thirty (30) days or prior to every invoice, whichever is more frequent.
- d. **Noncompliance with SDB and/or VBE commitments.**
- 1) Upon BDISBO notifying the Department that the SFP Consultant did not comply with the SDB commitments or VBE commitments, the Department shall adhere to the Contract Documents, for remedies and corrective actions required. The SFP Consultant is required to initiate the corrective actions within ten (10) business days and complete them within the time specified by the Department.
 - 2) If the Department determines that material noncompliance with SDB and VBE contract provisions exists and that the SFP Consultant refuses or fails to take the corrective action required by the Department, the Department, in consultation with BDISBO, may impose any and all sanctions and remedies available under the contract as it deems appropriate. Such sanctions or remedies include, but are not limited to, withholding of payments; termination of the contract along with consequential damages; revocation of the SFP Consultant's SB, SDB, and/or Veteran Business Enterprise (VBE) status; a determination that the Proposer's SDB or VBE participation submittal be deemed non-responsible in future procurements; and/or any actions under the Commonwealth's Contractor Responsibility Program, up to and

including suspension or debarment from future contracting opportunities with the Commonwealth.

END OF PART 2

PART 3

CRITERIA FOR SELECTION

- 3-1. COMPETITIVE SEALED PROPOSAL AWARD.** If the Commonwealth awards a contract, the award will only be made to the responsive and responsible Proposer, whose proposal conforms to the requirements of this RFP and receives the highest overall Total Proposal Score by the Evaluation Committee in accordance with the evaluation factors, procedures and criteria set forth in this RFP.
- 3-2. PROPOSAL EVALUATION PROCESS.** The Issuing Office has selected an Evaluation Committee comprised of three (3) qualified personnel to review and evaluate timely submitted proposals. Independent of the Evaluation Committee, the Issuing Office and BDISBO (when necessary) will evaluate the SDB and VBE Participation Submittals to determine if responsive. The Technical Submission (and only the Technical Submission) from all responsive Proposers will be evaluated by the Evaluation Committee. The members score each Technical Submittal pursuant to the Scoring Matrix, which is attached to this RFP as an Appendix. To describe the scoring process briefly:
1. A Responsiveness Review of the entire Proposal Submission shall be performed. The purpose of this review is to determine each proposal's compliance with the Mandatory Proposal Requirements. Non-compliant Proposals will be rejected as non-responsive.
 2. All Small Diverse Business and Veteran Business Enterprise Participation Submittals of all Proposals that meet the Mandatory Proposal Requirements will be reviewed for completeness in accordance with the Instructions for Completing the SDB Participation Submittal and Utilization Schedule and the Instructions for Completing the VBE Participation Submittal and Utilization Schedule. The purpose of this review is to determine each proposal's compliance with the Instructions for Completing the SDB Participation Submittal and Utilization Schedule and the Instructions for Completing the VBE Participation Submittal and Utilization Schedule. Non-compliant Submittals will be rejected as non-responsive. The Commonwealth will not score the SDB and VBE Participation Submittals.
 3. All Technical Submittals of any Proposals determined to be responsive will be forwarded to the RFP Coordinator and the Evaluation Committee.
 4. All Proposals receiving less than 75% of the total available points for their Technical Submission will be deemed non-responsive and rejected.

5. All Proposals receiving at least 75% of the total available points for the Technical Submission will be considered responsible. Starting with the responsible highest scorer, discussions will be scheduled between the highest three scoring Proposers and the Evaluation Committee. However, if there is a tie for the third highest score, all Proposals with the third highest score will be scheduled for a discussion. Example scenarios:
 - a. Proposer A – 500 points, Proposer B – 450 points, Proposer C – 400 points, and Proposer D – 350 points: Proposers A, B, and C are scheduled for discussions.
 - b. Proposer A - 500 points, Proposer B - 500 points, Proposer C - 450 points, and Proposer D - 400 points: Proposers A, B, and C are scheduled for discussions.
 - c. Proposer A - 500 points, Proposer B - 450 points, Proposer C - 400 points, and Proposer D - 400 points: Proposers A, B, C, and D are scheduled for discussions.
6. Proposers not scheduled for a discussion will not be eligible to be selected as the SFP Consultant.
7. The Evaluation Committee may re-score the Technical Submissions of those Proposers with whom they had a discussion after taking into consideration the information determined through the discussion using the same technical evaluation criteria.

3-3. TECHNICAL SUBMITTAL EVALUATION. The Evaluation Committee members will independently evaluate each proposal using the Scoring Matrix provided as an Appendix to this RFP. The Evaluation Committee's scores for each Technical Submission will be used in the determination of the 75% threshold for a responsible Proposer. Only Technical Submissions receiving at least 75% of the total available points will be considered responsible. Any Proposal not receiving at least 75% of the available points for the Technical Submission will be deemed non-responsible and rejected. As discussed in Section 3-2, the responsible Proposers with the three highest scorers will have a discussion scheduled with the Evaluation Committee.

After the discussions, the Evaluation Committee may re-score the Proposers using the information learned during the discussion, the criteria in Part 2-4, and the scoring matrix.

3-4. PROPOSAL SELECTION AND NOTIFICATION. The RFP Coordinator will verify the re-scoring of the Evaluation Committee's Technical Submission scores after any discussions. The RFP Coordinator will then calculate the Evaluation Committee's average score for each Proposer after any discussions and the Proposer with the highest Technical Score will be selected for negotiations.

The Issuing Office will notify all Proposers in writing of the Proposer selected for contract negotiations.

END OF PART 3

PART 4

WORK STATEMENT

STRATEGIC FACILITY PLANNING CONSULTING SERVICES

4-1 GENERAL INFORMATION

1. Background: The Department of General Services' Capital Programs Deputate coordinates and oversees the design and construction of all non-highway capital construction projects for the Commonwealth of Pennsylvania. One of its key strategic focuses is on the meticulous planning and implementation of projects, emphasizing the importance of delivering them on time and at appropriate levels of capital investment. To better achieve this, DGS has implemented Strategic Facility Planning, a proactive approach aimed at aligning construction efforts with long-term goals and needs. In collaboration with Commonwealth agencies, DGS actively works to develop comprehensive strategic facility plans, projecting the infrastructure landscape for the next 5 to 10 years. This collaborative effort ensures that each agency's unique requirements and objectives are integrated into the broader framework, fostering a cohesive and forward-thinking approach to capital construction endeavors.
2. Context: The Pennsylvania Department of Human Services' (DHS) seven program offices administer services that provide care and support to Pennsylvania's most vulnerable individuals and families.

The Office of Child Development and Early Learning promotes early childhood development through high-quality learning opportunities, while the Office of Children, Youth, and Families oversees county-based child welfare and juvenile justice systems tailored to local communities.

The Office of Developmental Programs advances person-centered supports for individuals with developmental disabilities, and the Office of Income Maintenance provides essential assistance programs – such as SNAP, TANF, Medical Assistance / CHIP, LIHEAP, childcare and refugee resettlement – to low-income and vulnerable residents statewide.

The Office of Long-Term Living offers guidance and services for people needing help with daily living due to aging, disability, injury, or illness, and the Office of Medical Assistance Programs administers Medicaid to ensure access to healthcare through both fee-for-service and managed care systems.

The Office of Mental Health and Substance Abuse Services delivers culturally competent behavioral health services for children, adults, and older adults, emphasizing recovery, resiliency, and community inclusion.

Together, these offices demonstrate the agency's diversity by serving wide-ranging populations with varied, responsive, and mission-driven support.

DHS' mission is to assist Pennsylvanians in leading safe, healthy, and productive lives through equitable, trauma-informed, and outcome-focused services while being an accountable steward of Commonwealth resources.

This study will focus on the facilities operated by DHS that provide round-the-clock care to individuals with intellectual disabilities, those needing psychiatric care, and juvenile justice services. The aim is to develop a roadmap for implementing a series of capital projects to support and sustain these vital missions for years to come.

3. Objective: The purpose for this Request for Proposal is to retain a Strategic Facility Planning Consultant (SFP Consultant) with the necessary qualifications and resources needed to develop an agency-specific Strategic Facility Plan which will align the agency's facility needs with their business and operational goals and objectives. A strategic facilities plan is necessary to ensure capital projects of the right character are done at the right time in the right place and for the right level of public investment.

In addition, the SFP Consultant will be expected to assist DGS in further development and refinement of standardized processes and procedures that can be used in conjunction with future Strategic Facilities Plans undertaken for other agencies as part of DGS's ongoing program of continuous improvement.

Project Team:

- a) Department of General Services (DGS or Department) Bureau of Capital Projects Planning and Procurement – Responsible for procurement, execution, and management of the SFP Consultant Contract.
- b) Department of Human Services – Client Agency
- c) SFP Consultant team
- d) Agency Planning Manager
- e) Agency Steering Committee
- f) Agency Planning Committee

Facility Portfolio:

- A. Refer to Attachment 2 of the Agreement for the “Matrix of Included Facilities” to be examined in the study and the specified types of assessment(s) to be performed at each of the respective locations.

4-2 GENERAL REQUIREMENTS. The following elements of the work scope shall be considered the minimum level of performance required under this RFP, unless specifically modified in writing as an outgrowth of the contract negotiations process successfully completed with the Proposer selected for negotiations.

1. Project Management: The SFP Consultant shall:
 - a. Provide sufficient staff and subconsultants to perform the required scope of services in accordance with the approved project work plan schedule.
 - b. Upon consultation with the Client Agency and DGS, submit a Project Work Plan for approval, deploy and manage project resources to effectuate the timely implementation and completion of the approved plan’s various components.
 - c. Submit a List of Project Deliverables, correlated to the breakdown of fees appearing in the Schedule of Payments of the agreement and to the project work plan schedule, for approval. Deliverables shall be identified on the project schedule.
 - d. Prepare and regularly update a detailed project schedule to include:
 - 1) Project milestones
 - 2) Anticipated meetings
 - 3) Consultant team tasks
 - 4) Milestones for decisions to be made by DGS and/or the Agency.
 - 5) Dates for receipt of project deliverables
 - e. Provide ongoing project management services to advance the project and maintain the schedule. Coordinate all project activities involving the participation of the Client Agency representatives, establishing dates for meetings and events that are in harmony with their regular duties, scheduled operations, and the portions of the academic calendar contemporaneous with the duration of the engagement.
 - f. Provide bi-weekly progress reports on the status of scope of services (including level/percentage of completion), schedule, project issues, and deliverables.
 - g. For project coordination and data gathering meetings required throughout this project, coordinate proposed meetings with DGS and the Agency. Prepare and distribute agendas and minutes for each meeting. Prepare and distribute exhibits and supporting information for meetings as required. Issue with sufficient lead time to allow participants to familiarize themselves with the agenda and prepare for the meeting accordingly.

- h. Coordinate the work of their team including any subconsultant(s).
- i. Consult with and advise DGS as needed on specific project issues and strategic facility planning in general.
 - 1) Develop standardized processes, procedures, and documents that DGS can use for future strategic facility planning. Documents should include data-gathering tools (e.g. questionnaires, assessments, spreadsheets, etc.)
 - 2) Gather, manage, and submit facilities data in formats compatible with DGS's IBM TRIRIGA portfolio management system in use.
- 2. Contractual Relationship: The SFP contract will be between DGS and the SFP Consultant. Binding directions to the SFP Consultant will come from DGS only.
 - a. During any interaction with the Client Agency, the SFP Consultant shall not engage in any services requested by the Client Agency that are additional to those contracted without authorization from DGS. Failure to adhere to this requirement will result in no payment for unauthorized work.
- 3. Software: DGS will utilize Trimble Unity Construct (formerly e-Builder, hereinafter referred to as "Trimble") for project management, including but not necessarily limited to invoicing, and Microsoft enterprise systems for communication, document transfer outside of Trimble, and other miscellaneous tasks as directed by DGS. Other forms of software may be implemented over the course of the work at the Department's sole discretion.
 - a. The SFP Consultant shall participate in all activities necessary to use the system software effectively for the entirety of the project.

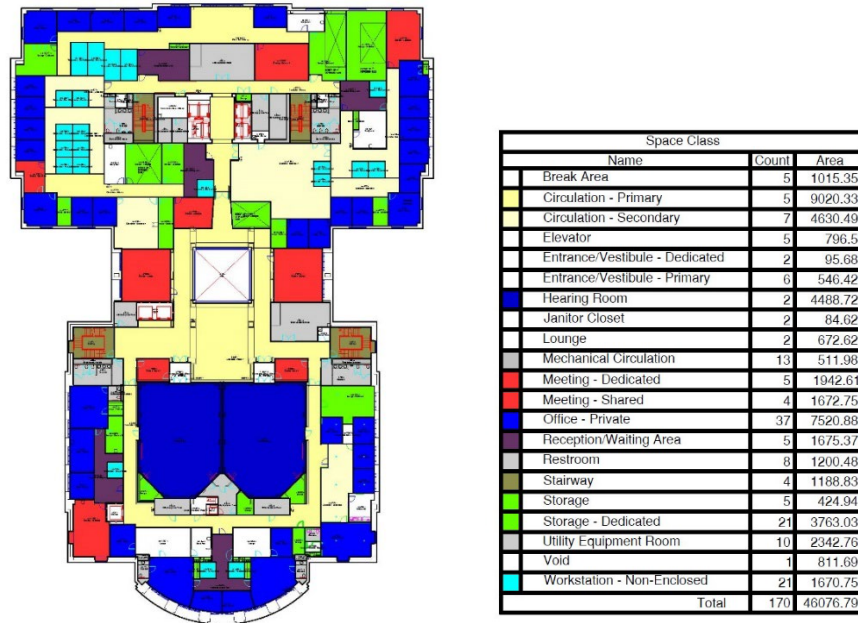
4-3 SCOPE OF SERVICES

- 1. Phase 1 – Understand
 - a. Hold a kick-off meeting with DGS and the Agency
 - 1) Introduce the concept and explain the benefits of strategic facility planning.
 - 2) Discuss planned processes and procedures.
 - 3) Confirm scope of services, schedule, and project management expectations.
 - 4) Establish protocols for stakeholder engagement.
 - 5) Prepare for the visioning session.
 - b. Create a project work plan encompassing all project related activities and deliverables, to include meetings, workshops, site visits and field work and a schedule meeting the requirements established for use with the Trimble management platform in use by the Department. The Consultant

shall be responsible for maintaining the project schedule and adhering to the approved project work plan throughout the life of the project.

- c. Conduct a project Visioning Session with the Steering Committee and any other key stakeholders as one of the preliminary project events to memorialize current challenges and the agency's aspirations, goals and objectives for an optimized future state of the portfolio most suitable for supporting their mission, vision, and operations.
- d. Work with the Agency to form the project team and identify all project stakeholders.
 - 1) Agency Planning Manager – Agency's primary point of contact; will have regular interaction with the SFP Consultant and DGS and will be responsible for transmitting information to/from the Steering and Planning Committees.
 - 2) Agency Steering Committee – small group consisting of key Agency leaders/executives responsible for making decisions, validating content, and guiding the process.
 - 3) Agency Planning Committee – broad technical group consisting of key Agency staff and other stakeholders and clients identified by the Steering Committee responsible for idea generation, technical expertise, and capacity-building.
- e. Obtain existing facilities-related data, building and site plans (in AutoCAD or Revit format), the Agency's strategic plan (if available), and related files.
 - 1) AutoCAD files of existing facilities' floor plans:
 - i. Where existing AutoCAD files are not available, the consultant will develop them (in either Revit or AutoCAD as is implemented by DGS/BRE at the time of negotiations) as an additional service to a level of detail sufficient to document space allocations and as determined during the negotiations process.
 - ii. The consultant shall be responsible for coordinating with the client agency for obtaining access to existing documentation for reference and/or digitization purposes. The consultant shall provide a log of documents being removed from the client agency's location at the time of such removal, and shall act as the custodian of same until such time as the documents are safely returned in the original unaltered condition.
 - 2) Deliverable plans (for owned facilities only) must be enhanced to illustrate existing functional areas and space utilizations and be made compatible with conventions currently in use by the DGS Bureau of

Real Estate in the management of its TRIRIGA database, an example of which appears below.



Sample Space Utilization plan with Legend

- i. Additional services fees are applicable to the creation of base plans only. The superimposition of graphics depicting space utilization shall be accomplished as a basic service for digital drawing files, whether developed under a work order or furnished to the consultant.
 - ii. Digital drawing files shall be prepared in Revit® software in order to facilitate uploading into the TRIRIGA® asset management platform currently in use by the Commonwealth.
- 3) Space utilization drawings for leased facilities shall not be required as a basic service.
 - 4) Existing TRIRIGA data, including building numbering nomenclature currently in use and to be continued and other relevant data.
- f. Conduct a comprehensive operational assessment of the entire agency's real estate portfolio to assess and identify operational efficiency throughout the agency.
 - g. Conduct a comprehensive facility condition assessment (FCA) at the locations as indicated in the table entitled "Matrix of Included Facilities." Appearing in Attachment 2.
- 1) Facility condition assessments to be performed under this RFP shall be completed in accordance with ASTM E2018-24 Standard Guide for

Property Condition Assessments: Baseline Property Conditions Assessment Process.

- 2) Facility Condition Assessments shall be summarized in tabular form for uploading into the TRIRIGA portfolio management platform in use by the Department. The format of the table (MS Excel spreadsheet) shall include, as a minimum, the information fields illustrated below, subject to final adjustments during either negotiations or the course of the work:
 - i. Building System Classification (e.g., B3010 - Roof Coverings)
 - ii. Specification Classification (e.g., Division 07 51 16 - Built-Up Asphalt Roofing)
 - iii. Name
 - iv. Description
 - v. Manufacturer / Brand
 - vi. Model Name
 - vii. Model Number
 - viii. Serial Number
 - ix. Primary Location (Building, Floor, and Room)
 - x. Useful Life
 - xi. Condition
 - xii. Maintenance Priority
- 3) A column shall be included to indicate the presence of a fire suppression system. The full FCA report shall also include information pertaining to its type, age and condition, as well as latest test and inspection dates and results, if known.
- 4) Perform Site/Grounds condition assessments at all the above locations receiving facility condition assessments.
- h. Work with the Agency Steering Committee to review and document:
 - 1) Agency's mission, vision, values, goals, and objectives.
 - 2) Organizational structure, current/future workplace strategies (i.e. telework), staffing levels (FTE), culture, etc.
 - 3) Opportunities and challenges: what problems can be addressed/resolved through strategic facility projects? What are the potential impediments?
 - 4) Operational requirements: what is needed to achieve agency mission/objectives?
 - 5) Issues and trends: over the next ten (10) years, what may impact how the Agency fulfills its mission and the need for facilities?
- i. Work with the Agency Planning Manager to review and document:

- 1) State of existing facilities (size, general condition, location, space utilization, capability, ownership, energy usage, cost data, etc.).
 - 2) All capital improvement projects completed in the last ten (10) years.
 - 3) Operating and facility costs and budgets.
 - 4) Demand needs: who/what determines facility/space needs?
 - 5) Facilitate long-range facility visioning: needs/goals/outcomes?
- j. Develop standardized facility classifications to identify the primary use of each facility and standardized facility condition ratings to measure the physical condition of each facility.
- k. Engage with the Agency through:
- 1) Workshops, small-group discussions, and interviews
 - 2) Surveys (all such surveys must be vetted through DGS for pre-approval)
 - 3) Site visits/facility tours
- l. Prepare a report summarizing the initial findings and identifying the departments/stakeholders interviewed, and the facilities visited. In addition to the written narrative and any useful graphs, charts, plots, and the like, the report(s) shall include graphical exhibits illustrating functional space allocations in digital format suitable for uploading into the TRIRIGA portfolio management platform in use by the Commonwealth.
2. Phase 2 – Define
- a. Collaborate with the Agency and conduct Workshops to develop:
- 1) A strategic facilities mission/vision statement that aligns with the Agency’s mission/vision/values and defines what the facility portfolio should look like in the next (5) and (10) years.
 - 2) Goals and objectives that establish the desired functional parameters and operational outcomes for the Agency’s facility portfolio.
 - 3) Strategies and actions needed to realize the goals and objectives.
- b. Prioritize the goals/objectives and identify the key success factors.
- c. Create benchmarks/measurements to monitor progress and performance.
3. Phase 3 – Analyze
- a. Perform a gap analysis that compares the Agency’s facility supply to their business demands and a capacity analysis to determine current utilization metrics. Outcomes should include:
- 1) Solutions to fill the gaps.
 - 2) Recommendations to maximize mission readiness.
 - 3) Strategies to optimize workflow and operational efficiencies to defer the need for capital spending.

- 4) Budgets for capital planning - harmonized with agency annual spending limits to the extent feasible.
 - 5) Space management and forecasting techniques.
- b. Conduct scenario planning to identify opportunities for facility improvements, disposition, consolidation, and/or acquisition. Include in the scenario planning anticipated future scenarios and operational states that may influence:
- 1) Potential improvements in space utilization
 - 2) Potential improvements in operations
 - 3) Phasing of potential relocations

Consider specific scenarios to provide for the highest and best use of the Agency's facilities.

- c. Develop business cases for improvements, relocations and/or dispositions at each of the facilities. Evaluate alternatives using total cost of ownership analyses, operational requirements, projected changes to the required footprint, potential efficiencies or cost savings, and identified risk factors.
- d. Evaluate the asset strategies available to the Agency and identify the optimal strategy that will enhance the value or minimize the cost to the Agency and meet the objectives of the strategic facilities planning mission.
- e. Format deliverables to interface with the IBM TRIRIGA software as required to export/import data, complete analyses, and generate reports.

4. Phase 4 – Plan

- a. Work with the Agency to identify the facility projects/initiatives (including action, location, scope, budget, and timeline) that address the gap between their existing facilities and their future needs.
- b. Prepare a draft Strategic Facility Plan
- 1) Document the facilities mission/vision, goals and objectives, and benchmarks/progress measurements developed in Phase 2.
 - 2) Develop a high-level phased implementation plan and specific recommendations for both short-term (one (1) to three (3) years) and long term (three (3) to six (6) years) facility strategies.
 - 3) Document the facility projects/initiatives and show that each is supported by the analysis completed in Phase 3 and is operationally required and financially justified.
 - 4) Prioritize the sequence of facility projects/initiatives that should occur over the next six (6) years.

- 5) The plan shall define all discrete capital improvement projects for each location.
 - i. For each project identified in the final strategic facilities plan, narrative information shall be provided to concisely summarize the project's purpose, clearly articulated scopes of work, detailed cost estimates, and an optimized phasing strategy for efficiently sequenced implementation. Cost estimates shall also be provided with the appropriate escalation factors to align with each project's completion timeline on the final plan (midpoint of construction). Costs shall include any associated relocation costs as a component.
- 6) Align the Strategic Facility Plan with the current Capital Plan and future capital budgets.
- 7) Present the findings through reports, graphs, and charts to provide a visual representation of the data. The material prepared shall be clear, detailed, and sufficient to reflect the scope of the findings. Include an executive-level one-page (A3) summary.
- 8) Include, where necessary to support the plan, ACAD plan exhibits illustrating envisioned space utilizations and allocations for uploading to TRIRIGA.
- 9) Verify the Strategic Facility Plan is:
 - a) Internally consistent
 - b) Consistent with the Agency's mission/vision, culture, and environment
 - c) Flexible
 - d) Practical
 - e) Achievable in the suggested time frame and with the available resources
- c. Review the Strategic Facility Plan
 - 1) Review the draft Facilities Plan with DGS and the Agency's Steering Committee and gather their feedback.
 - 2) Refine the Facilities Plan by incorporating DGS's and the Agency's comments.
- d. Prepare a final Strategic Facility Plan
 - 1) Review the final Strategic Facilities Plan with DGS and the Agency's Steering Committee and document their approval.
- e. Create maps and other visualizations to manage projects and initiatives.

- f. Present the Strategic Facility Plan to DGS and the Agency for final approval.
- 5. Phase 5 – Act
 - a. Conduct a post-study evaluation workshop for the purpose of reviewing the engagement and identifying opportunities for improvement of DGS standard procedures and methods.
 - b. Provide a report summarizing the findings for DGS implementation.

END OF PART 4