

REQUEST FOR PROPOSALS

**Program Management Services
New Facilities for the
Medical Center of Louisiana at New Orleans
LSU Health Care Services Division
New Orleans, LA
State Project No. 19-610-06B-04, Part 01**

December 23, 2008

REQUEST FOR PROPOSALS

ISSUE DATE: December 23, 2008

TITLE: Program Management Services
New Facilities for the Medical Center of Louisiana at New Orleans
LSU Health Care Services Division
New Orleans, LA
State Project No. 19-610-06B-04, Part 01

ISSUED BY: The State of Louisiana
Division of Administration
Facility Planning and Control
Claiborne Building
1201 N. 3rd Street, Suite 7-160
P. O. Box 94095
Baton Rouge, LA 70804-9095

SEALED PROPOSALS will be received until **4:00 p.m., January 30, 2009** for furnishing the services described herein. **Packages must be labeled "Program Management Services, New Facilities for the Medical Center of Louisiana at New Orleans, State Project No. 19-610-06B-04, Part 01" and shown clearly on the outside of the package.** Deliver to the address listed above.

In compliance with this Request for Proposals and with all Conditions imposed therein, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

I certify that I have read and understand this Request for Proposals and am authorized to sign this proposal for the Proposer. I certify that the language in this document has not been altered in any way and appears as originally transmitted by the issuing authority.

NAME AND ADDRESS OF FIRM:

DATE: _____
BY: _____
(signature in BLUE ink)
NAME: _____
(print or type)
TITLE: _____
PHONE: _____
FAX: _____

Please return the original and six (6) complete copies of your proposal.

Fax or e-mail transmissions of RFP responses will not be accepted.

**Request for Proposals
Program Management Services
New Facilities for the Medical Center of Louisiana at New Orleans**

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1.0 GENERAL INFORMATION

1.1 INTRODUCTION AND PURPOSE

The purpose of this Request for Proposals (RFP) is to solicit sealed proposals from qualified firms to establish a term contract for Program Management Services on behalf of The State of Louisiana (herein defined as "State of Louisiana" or "Owner"). Due to the size and complexity of this project, along with the interface necessary with a diverse set of project stakeholders, both internal and external, the Owner seeks a qualified project management firm to serve as the Owner's official representative in the day to day facilitation, communication and management of this project for various phases as described in this RFP.

1.2 GENERAL DESCRIPTION AND BACKGROUND

The Medical Center of Louisiana at New Orleans (MCLNO) is one of seven hospitals in the Louisiana State University Health Care Services Division. MCLNO provides health care for the citizens of Southeast Louisiana and serves as a medical education training facility. MCLNO previously consisted of two hospitals in New Orleans, the MCLNO Charity Campus and the MCLNO University Campus.

MCLNO Charity was severely damaged by Hurricane Katrina in 2005, was closed, and is not expected to be re-opened as a hospital. After the storm, the hospital operations were consolidated into the University Hospital as an interim hospital until new facilities are built. The new hospital will combine the functions of the two hospitals and nearby associated facilities. Prior to the storm Charity had 345 licensed beds and approximately 1,000,000 SF and University had 369 licensed beds and approximately 364,400 SF.

The new facility is proposed to be built in mid-town New Orleans on a site that is in near proximity to the LSU Health Sciences Center and University Hospital. The new facility is expected to be a campus for a 424 bed research and teaching hospital with a level one trauma center. The total area planned is approximately 1,600,000 SF with an estimated construction budget of approximately \$754,000,000. Included in the campus will be a new ambulatory care building, central energy plant, structured and surface parking, office space, etc.

The joint venture design team of Blitch Knevel Architects and NBBJ has been selected for the project and they are currently in the Schematic Design phase of the project (see preliminary schedule on page 34). Proposers are not to have communications with the design team regarding this RFP.

It is anticipated the new MCLNO will be built adjacent to a proposed new Veterans Affairs (VA) hospital. The two hospitals would be designed to be separate facilities and it is expected they will share contracted services which would be provided to patients of both hospitals. The two facilities are expected to be designed and built with the cooperation of both entities with the understanding that both LSU and the VA would manage and fund the design and construction separately.

1.3 STATEMENT OF NEEDS

1.3.1 PROJECT TEAM

- 1.3.1.1 Owner will have a primary representative for the project, who will provide oversight of the Program Manager and will assist in all matters of project coordination and decision-making.

- 1.3.1.2 The Program Manager will be expected to have a key full-time representative and the PM core team officing in close proximity to the proposed site in New Orleans.
- 1.3.1.3 Owner has selected prominent consultants for complete programming and architectural services.
- 1.3.1.4 Current expectations are that multiple project delivery strategies may be employed (e.g., traditional, CM as Constructor, multi-prime trade contracts), incorporating fast-tracking and integrated project delivery, for different components of the program.
- 1.3.1.5 Owner desires that the Program Manager will be a key member of the Project Delivery Team and be actively involved in all aspects of planning, procurement, and design of the Project. Program Manager may also perform services related to the construction, occupancy and post-occupancy of the Project, and the relocation of facilities, personnel and patients should the contract be extended. The Program Manager is expected to provide detailed reviews, analysis and recommendations regarding the performance of Consultants, Architect(s) and Construction Contractor(s) in meeting Owner's objectives. In providing its services to Owner, the Program Manager is expected to cooperate and maintain a high-degree of professionalism with the entire Project Delivery Team, fostering a collaborative environment for the development of the entire project. In addition, the Owner may desire the Program Manager to also provide and/or manage complete commissioning services.

1.3.2 DESCRIPTION OF PROGRAM MANAGEMENT SERVICES

In accordance with the Agreement, it is expected the successful Proposer will provide Program Management services during the following phases of the Project:

- Phase 1: Project Definition/Organization & Planning
- Phase 2: Design/Preconstruction
- Phase 3: Design Completion/Construction Commencement Phase
- Phase 4: Construction
- Phase 5: Occupancy/Post Occupancy

A sample contract is attached to this RFP, but the final terms of an agreement are to be mutually agreed upon by the successful Proposer and Owner as a result of this RFP. Program Manager's services are divided into phases, but the services described under each phase may overlap and apply to preceding or subsequent phases as well. Program Manager shall provide overall leadership, administration, and coordination for the Project. The five (5) Project Phases are more fully described in Exhibit B, PM Scope of Services, in this solicitation.

2.0 ADMINISTRATIVE INFORMATION

2.1 Expected Time Period for Contract

The period of any contract resulting from this RFP is tentatively scheduled to begin as outlined in the Schedule of Activities. Currently the State is limited to contract for up to only three years however it is the intent of the State to seek legislation to increase the maximum time period for at least five (5) years for this project.

2.2 RFP Coordinator

Requests for copies of the RFP and written questions must be directed to the RFP Coordinator listed below.

Mark Moses, P. E. Senior Manager
RFP Coordinator
State of Louisiana
Division of Administration
Facility Planning and Control
Claiborne Building
1201 N. 3rd Street, Suite 7-160
P. O. Box 94095
Baton Rouge, LA 70804-9095

This RFP is available in electronic format at <http://www.doa.louisiana.gov/fpc/fpc.htm> in PDF format or in printed form by submitting a written request to the RFP Coordinator.

2.3 ISSUING OFFICE

This RFP is being issued by The State of Louisiana, Division of Administration, Facility Planning and Control.

2.4 SCOPE

This document contains the instructions governing the proposal to be submitted; the format in which proposals are to be submitted and the material to be submitted therein; product requirements, evaluation criteria; and contractual terms and conditions.

2.5 INQUIRIES

The State will consider written proposer inquiries regarding RFP requirements or Scope of Services before the date specified in the Schedule of Activities. The State reserves the right to modify the RFP should a change be identified that is in the best interest of the State.

To be considered, written inquiries and requests for clarification of the content of this RFP must be received at the below address or via fax at 225-342-7624 by 4:00 p.m. CST on the date specified in the Schedule of Activities. Any and all questions directed to the RFP Coordinator will be deemed to require an official response. Official responses to each of the questions presented by the proposers will be posted by the date indicated in the Schedule of Activities. Only the RFP Coordinator has the authority to officially respond to proposer's questions on behalf of the State. Any communications from any other individuals are not binding to the State.

Inquiries only may be faxed to 225-342-7624, or emailed to Mark.Moses@LA.GOV.

2.6 COMMUNICATIONS

From the issuance of this RFP until contract award, communications concerning this solicitation, its evaluation, and negotiations are formal. All correspondence must be in writing and transmitted directly to the individual shown above in Section 2.2 of this section. At any time during the RFP process, firms are not permitted to ask questions about other vendor's proposals, equipment, or services; or to seek information from State of Louisiana personnel, including the design team of Blich Knevel Architects / NBBJ, on

this RFP or the evaluation results. If a vendor is approached by State of Louisiana personnel with information or questions concerning the RFP, the vendor shall immediately contact the RFP Coordinator listed above for direction. Failure to abide by this formal communication requirement may cause the State of Louisiana to disqualify your firm's proposal from further consideration.

2.7 ADDENDA TO RFP

Amendments to this RFP may be necessary prior to the closing date and will be furnished to *all* prospective proposers. Failure to acknowledge receipt of amendments in accordance with the instructions contained in the addenda may result in the proposal not being considered.

2.8 SCHEDULE OF ACTIVITIES

Release (Advertisement) of RFP	December 23, 2008
Closing Date for Inquiries	January 12, 2009
State's Response to written Inquiries	January 19, 2009
Submission of Proposals no later than	<u>January 30, 2009 until 4:00 p.m.</u>
Short List Presentations (if necessary)	February 12 - 13, 2009
Best and Final Offers (if necessary)	February 20, 2009
Selection of PM	February 27, 2009
Expected PM Start Date	March 16, 2009

Note: The State of Louisiana reserves the right to amend and/or change this schedule of RFP activities as it deems necessary.

2.9 CONTRACTUAL DOCUMENT

This RFP and the selected Proposer's proposal will become the basis for the development of the legally binding contract between the Owner and the Proposer. In the event the services should fail to meet the standards as specified in the Proposer's proposal, the Owner reserves the right to terminate and cancel any contract.

2.10 EXCEPTIONS TO TERMS AND CONDITIONS

It is the specific intent of the Owner that the only terms and conditions with the successful Proposer shall be those contained within this RFP, including exhibits; provided, however, that Owner reserves the right to change the terms of the sample contract attached to this RFP prior to execution. The final contract between the Owner and the successful Proposer may be negotiated between the parties. If a Proposer takes exception to any term or condition, the Proposer shall in a separate section of its original proposal response: 1] identify the specific term/condition in question, 2] specify the language that is causing conflict, and 3] explain in detail why the language is unacceptable. The Proposer is also required as part of its proposal response to provide proposed alternate language for each term/condition that is considered to be in conflict.

2.11 DEFINITIONS

For purposes of this Request for Proposal, the following words and terms shall have the meanings specified below:

1. *Agreement* shall mean the terms and conditions contained in the Program Manager Agreement; the sample form of the Agreement which is included as Exhibit A of this RFP.

2. *Architect* shall mean the architectural firm(s) retained by Owner to provide design services for the Project, including its agents and representatives. Referred to as “Architect” or “Designer”
3. *Design Assist* shall mean the early selection of mechanical and electrical subcontractors, prior to the completion of contract documents to assist the mechanical and electrical designers with field constructability issues, selection of long-lead equipment and help to align the design with an established budget.
4. *Program Manager* shall mean the person or entity that will be awarded the Agreement by Owner, including its agents and representatives. Referred to as “PM.”
5. *Proposer(s)* shall mean those entities or persons submitting a Proposal for the RFP, including their agents and representatives.
6. *Owner* shall mean The State of Louisiana, Division of Administration, Facility Planning and Control, including its agents and representatives.
7. *Project Team or Project Delivery Team* shall mean the Owner, User Agency, Architect, Program Manager, Construction Contractor(s), and their respective agents and representative.
8. *Proposal(s)* shall mean a Proposer’s written proposal based on the terms and conditions contained in the RFP for the selection of a Program Manager to provide Program Management services for the Project.
9. *Proposal Due Date* shall mean the date established in this Request for Proposals.
10. *RFP* shall mean this Request for Proposals, including all addenda, attachments, and exhibits thereto. For the purpose of this RFP, the terms *The State of Louisiana* and *The State* shall be interchangeable and mean the Owner as defined above.
11. *Selection Committee* shall mean a group of individuals appointed by the Owner to determine and selected the most responsive and responsible Proposer.

3.0 PROPOSAL INFORMATION

3.1 GENERAL REQUIREMENTS

- 3.1.1 Proposers who are interested in providing consulting services under this RFP must submit a proposal containing the information specified in Section 4.0. The fully completed proposal with original signatures by an authorized representative must be received in hard copy (printed) version by the RFP Coordinator designated above by the deadline date specified in the Schedule of Activities. Fax or e-mail submissions are not acceptable. To be considered for selection, Proposers must submit a complete response to this RFP. A manually signed one (1) original and six (6) complete copies of the proposal must be submitted to the Owner.

Each copy of the proposal should be bound in a single volume. All information requested should be submitted; failure to submit all requested information may result in an unfavorable evaluation of the Proposer’s proposal or rejection of the proposal. Documentation submitted with the proposal should be bound in that single volume. Elaborate brochures and other representations beyond that sufficient to present a complete and effective proposal are neither required nor desired.

It is solely the responsibility of each proposer to assure that its proposal is delivered at the specified place and prior to the deadline for submission. Proposals, which for any reason are not so delivered, will not be considered for purposes of this RFP.

3.2 DETERMINATION OF RESPONSIBILITY

Determination of the proposer's responsibility relating to the RFP shall be made according to the standards set forth in LAC 34:136. The State must find that the proposer:

- Has adequate financial resources for performance, or has the ability to obtain such resources as required during performance.
- Has the necessary experience, organization, technical qualifications, skills, and facilities, or has the ability to obtain them.
- Is able to comply with the proposed or required time of delivery or performance schedule;
- Has a satisfactory record of integrity, judgment, and performance; and
- Is otherwise qualified and eligible to receive an award under applicable laws and regulations.

Proposers should ensure that their proposals contain sufficient information for the state to make its determination by presenting acceptable evidence of the above to perform the services called for by the contract.

3.3 RFP ADDENDA

The State reserves the right to change the calendar of events or revise any part of the RFP by issuing an addendum to the RFP at any time.

3.4 WAIVER OF ADMINISTRATIVE INFORMALITIES

The State reserves the right, at its sole discretion, to waive administrative informalities contained in any proposal.

3.5 PROPOSAL REJECTION

The issuance of this RFP in no way constitutes a commitment by the State to award a contract. The State reserves the right to accept or reject, in whole or in part, all proposals submitted and/or cancel this announcement if it is determined to be in the State's best interest.

3.6. WITHDRAWAL AND RE-SUBMISSION OF PROPOSAL

A proposer may withdraw a proposal that has been submitted at any time up to the date and time the proposal is due. To accomplish this, a written request signed by the authorized representative of the proposer must be submitted to the RFP Coordinator.

3.7 SUBCONTRACTING INFORMATION

The State shall have a single prime contractor as the result of any contract negotiation, and that prime contractor shall be responsible for all deliverables referenced in the RFP or proposal. This general requirement notwithstanding, a proposer may enter into subcontractor arrangements, however a proposer should acknowledge in its proposal total responsibility for the entire contract.

If the proposer intends to subcontract for portions of the work, the proposer should identify each subcontractor and should include specific designations of the tasks to be performed by the subcontractor. Information required of the proposer under the terms of this RFP is also required for each subcontractor.

Unless provided for in the contract with the State, the prime contractor shall not contract with any other party for furnishing the work and professional services herein contracted for without the express written approval of the State.

3.8 OWNERSHIP OF PROPOSAL

All materials submittal in response to this request become the property of the State. Selection or rejection of a proposal does not affect this right.

3.9 PROPRIETARY INFORMATION

Only information which is in the nature of legitimate trade secrets or non-published financial data may be deemed proprietary or confidential. Any material within a proposal identified as such must be clearly marked in the proposal and will be handled in accordance with the Louisiana Public Record Act, R.S. 44: 1-44 and applicable rules and regulations. Any proposal marked as confidential or proprietary in its entirety may be rejected without further consideration or recourse.

3.10 COST OF PREPARING PROPOSALS

The State is not liable for any costs incurred by prospective proposers prior to issuance of or entering into a contract. Costs associated with developing the proposal, preparing for oral presentations, and any other expenses incurred by the proposer in responding to this RFP are entirely the responsibility of the proposer, and shall not be reimbursed in any manner by the State of Louisiana.

3.11 ERRORS AND OMISSIONS IN PROPOSAL

The State will not be liable for any errors and/or omissions in proposals. The State reserves the right to make corrections or amendments due to errors identified in proposals by State or the proposer. The State, at its option, has the right to request clarification or additional information from the proposers.

3.12 CONTRACT AWARD AND EXECUTION

The State reserves the right to enter into a Contract without further discussion of the proposal submitted based on the initial offer received. The State reserves the right to contract for all or a partial list of services offered in the proposal.

The RFP and proposal of the selected proposer will become part of any contract initiated by the State. In case of any discrepancy between the documents the order of precedence will be the contract with contract amendments, RFP with addenda followed by the proposal.

The selected proposer will be expected to enter into a contract which is substantially the same as the sample contract included in Appendix A. In no event is a proposer to submit its own standard contract terms and conditions as a response to this RFP. The proposer should submit with their proposal any exceptions or exact contract deviations that their firm wishes to negotiate. Negotiations may begin with the announcement of the selected proposer.

3.13 CODE OF ETHICS

Proposers are responsible for determining that there will be no conflict or violation of the Ethics Code if their company is awarded the contract. Ethics issues are interpreted by the Louisiana Board of Ethics.

4.0 RESPONSE INSTRUCTIONS

4.1 PROPOSAL SUBMISSION

Proposals must be received on or before the time and date specified in the Schedule of Activities. Proposers mailing their proposals should allow sufficient mail delivery time to ensure receipt of their proposal by the time specified. The proposal package must be delivered at the proposer's cost to the RFP Coordinator listed above. It is solely the responsibility of each proposer to assure that their proposal is delivered at the specified place and prior to the deadline for submission. Proposals, which for any reason, other than the fault of the Office of Facility Planning and Control, are not received timely, will not be considered.

4.2 PROPOSAL FORMAT

The State requests that the proposal be submitted to the RFP Coordinator at the address specified. At least one copy of the proposal shall contain original signatures; that copy should be clearly marked or differentiated from the other copies of the proposal. This copy will be retained for incorporation by reference in any contract resulting from this RFP.

The proposal must be signed by those company officials or agents duly authorized to sign proposals or contracts on behalf of the organization. A certified copy of a board resolution granting such authority should be submitted.

4.3 SPECIFIC REQUIREMENTS

The following components are to be considered as contents for a complete submittal. The Owner shall evaluate and compare only proposals that substantially conform to the terms and conditions of the RFP. The Owner reserves the right to reject any and all proposals and to waive any informality. The proposal response format should be presented and submitted under tabs as noted below:

TAB 1: Signed Cover Letter and Acknowledgement of Addenda

A signed cover letter indicating request for consideration with Exhibit E (Acknowledgement of Addenda) included and filled out as required.

TAB 2: PROPRIETARY INFORMATION

State if any information contained in this proposal response is being declared proprietary as discussed in Section 3.9 of this RFP.

TAB 3: EXECUTIVE SUMMARY

Provide a brief summary of the Proposal's contents, emphasizing any unique aspects or strengths of the Proposal.

TAB 4: BUSINESS ORGANIZATION AND HISTORY OF THE FIRM

Provide a narrative on the history of the firm including years in business and the depth of resources to provide Program Management services. Explain the size of your firm, including office locations and the legal structure.

TAB 5: ORGANIZATIONAL STRUCTURE

This section of the Proposal should contain the following information and data:

- 5.1 If the Proposer is a corporation, provide the following information:
 - 5.1.1 Date of incorporation
 - 5.1.2 Place of incorporation and principal place of business
 - 5.1.3 Officers and Directors (include position, address and telephone number)
 - 5.1.4 Affiliates, partner corporations, and subsidiaries
- 5.2 If the Proposer is a general or limited partnership, provide the following information:
 - 5.2.1 General Partners (include address and telephone number)
 - 5.2.2 Limited Partners, if applicable (include address and telephone number)
- 5.3 If the Proposer is a joint venture, provide the following information:
 - 5.3.1 Date of formation
 - 5.3.2 Name and address of each venture partner
 - 5.3.3 Principals of each venture partner
 - 5.3.4 Venture partner holding the majority of interest in the joint venture and its percentage of interest.
- 5.4 If the Proposer is not a corporation, general or limited partnership, or joint venture, please identify the type of business entity and provide any pertinent information.
- 5.5 Provide the total number of employees (divided into full-time and part-time); and if a sole proprietor, so state this.

TAB 6: FINANCIAL CONDITION

- 6.1 The Proposer shall provide audited financial statements for the past three (3) fiscal years which show reflected net worth and all such other financial information usually reflected on statement of the Proposer. An independent, licensed, certified public accountant or certified public accounting firm shall have audited the statements. Financial statements provided will be kept confidential.
- 6.2 The Proposer should examine the insurance requirements shown in the attached Program Manager Agreement and should be prepared to provide an insurance certificate evidencing Proposer's liability insurance coverage with minimum limits, per the insurance requirements, as follows upon execution of a contract for the services listed in this RFP:
 - Workers Compensation –Statutory
 - Employers Liability - \$1,000,000
 - General Liability - \$5,000,000 each occurrence and \$5,000,000 annual aggregate
 - Automobile Liability - \$1,000,000 combined single limit
 - Professional Liability - \$3,000,000 each occurrence and \$3,000,000 annual aggregate

TAB 7: EXPERIENCE OF KEY PERSONNEL AND PROGRAM MANAGEMENT TEAM AND STAFFING PLAN

7.1 Organizational Chart

- 7.1.1 The Proposer should submit a detailed organizational chart identifying the individuals whom the Proposer proposes to perform the services required under the Agreement. Any firms or individuals proposed to be subcontracted to the Proposer shall be clearly noted as such.
- 7.1.2 The organizational chart should be accompanied by a narrative summary indicating the duties, the functional responsibilities, and the designated authority of each individual on the chart.
- 7.1.3 The Proposer should present a detailed monthly proposed PM man-hour staffing plan consistent with Exhibit C, Preliminary Schedule, for the duration of the project. The staff plan should assume a base condition of 4-7 separate projects (e.g., hospital building, ambulatory clinic building, parking structure, central energy plant, site work, etc), each to be delivered under a traditional design-bid-build approach. Final staffing will be adjusted to address actual delivery strategies and associated staff and services.

7.2 Key Personnel

- 7.2.1 For each key person identified by the Proposer, the following information should be provided in resume format:
 - (a) Name and title
 - (b) Project responsibilities and roles
 - (c) Educational background
 - (d) Professional registrations and memberships (if applicable)
 - (e) Years of relevant experience
 - (f) Relevant project experience

- 7.3 Identify the required services that you intend to subcontract, if any. Any firms or individuals proposed to be subcontracted to the Proposer shall be named and clearly noted as such.

TAB 8: EXPERIENCE ON SIMILAR PROJECTS

This section of the Proposal addresses the firm's related experience:

8.1 Experience with Major Teaching Medical Centers

Describe the Proposer's experience in the last five (5) years in any construction projects involving hospital facilities of significant scope, similar to the Medical Center of Louisiana at New Orleans project:

- (a) Project name, location, description, size, and cost
- (b) Date
- (c) Owner and any other key project team members (include address and telephone number)
- (d) Services performed by the Proposer or persons currently employed by the Proposer as well as the Proposer's office performing the work (if applicable)

- (e) Architect (include address and telephone number)
- (f) Any awards, recognition, or communications related to the project
- (g) Personnel who worked on the project who are being proposed for the Medical Center of Louisiana at New Orleans project

8.2 Arbitration/Litigation Proceedings

Describe any arbitration proceedings or litigation in the past five (5) years arising from or related to a project of similar nature to the proposed project or any such proceedings or litigation that did or could have a material effect on you company.

8.3 Disclosures of Conflicts

Disclose any financial or legal conflicts of interest, whether existing or potential, which may affect Proposer's performance of services required under the Agreement if Proposer is selected as Program Manager, including, but not limited to, any business services currently being provided for institutions that may be in direct competition with the State of Louisiana.

8.4 References

8.4.1 Provide the name, address and telephone number of no more than three (3) project Owners to act as references for the Proposer with whom Proposer has worked with within the past five (5) years. Identify the project(s), location(s), and services performed.

8.4.2 Provide the name, address and telephone number of no more than three (3) design professionals to act as references for the Proposer or persons currently employed by the Proposer with whom Proposer has worked with within the last five (5) years. Identify the project(s), location(s), and services performed.

8.4.3 Provide the name, address and telephone number of no more than three (3) construction contractors to act as references for the Proposer or persons currently employed by the Proposer with whom Proposer has worked with within the last five (5) years. Identify the project(s), location(s), and services performed.

8.4.4 The Proposer provides consent to Owner to contact the Proposer's references for purposes of evaluating the Proposer for the Project.

TAB 9: MANAGEMENT APPROACH AND SERVICES

9.1 The Proposer should provide a detailed narrative of the management approach that may be used for the Project. The Proposer should identify any unique experience, qualifications, techniques, and approaches that will best achieve the Project's objectives.

9.2 The following issues should be addressed:

9.2.1 Scheduling and scheduling management

- 9.2.2 Cost tracking and control
- 9.2.3 Real estate acquisition
- 9.2.4 Coordinating and planning of relocation activities
- 9.2.5 Demolition of existing structures
- 9.2.6 Project budget estimating and detailed construction cost estimating
- 9.2.7 Project documentation and reporting
- 9.2.8 Design review approaches
- 9.2.9 Construction phase coordination and management
- 9.2.10 Project quality assurance and control plan
- 9.2.11 Commissioning Management
- 9.2.12 Software programs, web based applications, and other computer applications to be used or required for program management, scheduling and cost management tasks
- 9.2.13 Provide samples of project deliverables
- 9.2.14 Experience with alternate delivery strategies and innovative ways to speed up procurement/delivery packages
- 9.2.15 Experience with 3D modeling and BIM
- 9.2.16 Construction coordination and quality assurance

TAB 10: UNIQUE CAPABILITIES/RESOURCES

- 10.1 Summarize any unique capabilities and/or resources that distinguish your firm with regard to this assignment.

TAB 11: EXCEPTIONS TO TERMS IN SAMPLE AGREEMENT

- 11.1 List any exceptions to the terms of the Sample Agreement.

Tab 12: FEE

- 12.1 The Owner will make a selection based on qualifications and a Fee Proposal submitted for the Scope of Services described in Exhibit B, consistent with the Exhibit C Preliminary Schedule and the respondent's proposed staffing plan.
- 12.2 The Fee Proposal should be broken down as follows:

Lump sum total fee – Include an estimated breakdown of manhours and rates for each employee by project phase.

Please note the Real Estate Program Management services in Phase 1 should be separately itemized within the Phase 1 work in the event that portion of the work is not awarded.

Complete breakdown of expected reimbursable expenses – Include a complete listing of material, services, and/or equipment for which you will expect to be reimbursed.

The FEE BREAKDOWN in Appendix F should be submitted in this section.

5.0 EVALUATION AND SELECTION

5.1 EVALUATION TEAM

The evaluation of proposals will be accomplished by an evaluation team, to be designated by the State, which will determine the proposal most advantageous to the State.

5.2 ADMINISTRATIVE AND MANDATORY SCREENING

All proposals will be reviewed to determine compliance with administrative and mandatory requirements as specified in the RFP. Proposals found not to be in compliance will be rejected from further consideration.

5.3 EVALUATION AND REVIEW

Proposals that pass the preliminary screening and mandatory requirements review will be evaluated based on information provided in the proposal. The evaluation will be conducted according to the following

5.3.1 Evaluation Criteria

Proposals will be evaluated using the following criteria with relative importance noted:

History, organization and financial condition of the firm (15%)

- Business organization and history of the firm
- Organizational structure
- Financial condition

Staff qualifications and staffing plan (25%)

- Experience of key personnel
- PM staff plan
- Experience on similar projects

Approach and methodology (35%)

- Management approach
- Experience with innovative delivery and procurement strategies
- Unique capabilities/resources
- Exceptions to terms of Sample Agreement (if appropriate)

Cost (25%)

- Fee

The evaluation team will evaluate and score the proposals using the criteria and scoring specified in the following table:

Criteria	Maximum Score
History, organization and financial condition of the firm	15
Staff Qualifications and staffing plan	25
Approach and methodology	35
Cost	25
Total Score	Sum of the above scores

Scoring cost:

Each proposer will receive a cost score computed as follows:

$$CS = (LPC / PC) * 25$$

Where: CS = Computed cost score for proposer

LPC = Lowest proposed cost of all proposers

PC = Proposer's cost

The evaluation team will compile the scores and make a recommendation on the basis of the highest overall score. The award of a contract is subject to the approval of the Division of Administration, Office of Contractual Review.

5.3.2 Award Criteria

A selection will be made based upon the evaluation criteria above. The Owner may elect to award only Phase 1 or a portion of Phase 1 services and maintain an option to award subsequent Phases to the selected firm. The Owner may cancel this Request for Proposals or reject proposals at any time prior to an award. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the Proposer's proposal as negotiated.

5.3.3 Announcement of Contractor

The State will notify the successful proposer and proceed to negotiate terms for final contract. Unsuccessful proposers will be notified in writing accordingly.

5.4 ORAL PRESENTATIONS

All proposers who are reasonably susceptible to receiving an award after the initial evaluation of the written proposals may be required to participate in a presentation interview with the Owner. This provides an opportunity for the Proposer to clarify or elaborate on the proposal. This is intended to be a fact finding and explanation session. The evaluation criteria listed above will also be the basis for evaluation of the oral presentations with the exception of "cost". The overall scores may be adjusted after the evaluation of the oral presentations.

The Owner will schedule the time and location of these presentations. The Proposer is responsible for all travel and lodging costs that may be incurred by the Proposer to conduct this oral presentation. The time and location of any such presentations will be determined at a later date.

Please note that oral presentations are an option to the state and there is a possibility that an award may be based on the initial written offers received.

5.5 BEST AND FINAL OFFER

Proposers may be asked to provide their best and final offer after evaluations of written and oral presentations are complete. If this option is selected, the RFP Coordinator will issue a request for the proposer's best and final offer. The request will include a final date and time that allows an opportunity for the proposers to submit their best and final offers. No further discussions will take place after receipt of the best and final offer. The offers will be evaluated and scores adjusted in order for an award to be considered.

6.0 CONTRACTOR REQUIREMENTS

6.1. CORPORATION REQUIREMENTS

If the contractor is a corporation not incorporated under the laws of the State of Louisiana, the contractor shall be prepared to obtain a certificate of authority pursuant to R.S. 12: 301-302 from the Secretary of State of Louisiana. Also, if the contractor is a corporation whose stock is not publicly traded, contractor will be required to file a "disclosure of Ownership" with the Secretary of State of Louisiana.

6.2 CONFIDENTIALITY

All financial, statistical, personal, technical and other data and information relating to the State's operation which are designated confidential by the State and made available to the contractor in order to carry out this contract, or which become available to the contractor in carrying out this contract, shall be protected by the contractor from unauthorized use and disclosure through the observance of the same or more effective procedural requirements as are applicable to the State. The identification of all such confidential data and information as well as the State's procedural requirements for protection of such data and information from unauthorized use and disclosure shall be provided by the State in writing to the contractor. If the methods and procedures employed by the contractor for the protection of the contractor's data and information are deemed by the State to be adequate for the protection of the State's confidential information, such methods and procedures may be used, with the written consent of the State, to carry out the intent of this paragraph. The contractor shall not be required under the provision of the paragraph to keep confidential any data or information which is or becomes publically available, is already rightfully in the contract's possession, is independently developed by the contractor outside the scope of the contract, or is rightfully obtained from third parties.

Under no circumstances is the contractor to discuss and/or release information to the media concerning this project without prior express written approval of the State.

7.0 EXHIBITS

The following exhibits are provided to assist Proposers in preparing their responses to this RFP and are considered part of this RFP package:

- A – Sample Consulting Services Contracts
- B – Program Management Scope of Services
- C – Preliminary Schedule
- D – Budget Summary
- E – Acknowledgement of Addenda
- F – Breakdown of Fee

Exhibit A – Sample Consulting Services Contract

STATE OF LOUISIANA

PARISH OF «ParishofProject»

CONTRACT FOR PROFESSIONAL SERVICES

BE IT KNOWN, that on this _____ day of _____, 2008, the State of Louisiana Division of Administration and «Contractor», «Address», «CityStateZip», do hereby enter into contract under the following terms and conditions.

1.

Contractor hereby agrees to furnish the following services:

«ProjectDiscription»
«ProjectDiscrip»
«ProjectDisc»
«CityState»
Project No. «ProjectNo»
State ID No. «StateID» Site Code: «SiteCode»

As per proposal dated «AsPerProposal», which is attached hereto and made a part thereof.

2.

The Contractor agrees to abide by the requirements of the following as applicable: Title VI and VII of the Civil Rights Act of 1964, as amended by the Equal Opportunity Act of 1972, Federal Executive Order 11246, the Federal Rehabilitation Act of 1973, as amended, the Vietnam Era Veteran's Readjustment Assistance Act of 1974, Title IX of the Education Amendments of 1972, the Age Discrimination Act of 1972, and contractor agrees to abide by the requirements of the Americans with Disabilities Act of 1990.

Contractor agrees not to discriminate in its employment practices, and will render services under this contract without regard to race, color, religion, sex, national origin, veteran status, political affiliation, or disabilities.

Any act of discrimination committed by Contractor, or failure to comply with these statutory obligations when applicable shall be grounds for termination of this contract.

3.

In consideration of the services described above, state hereby agrees to pay to Contractor a maximum fee of «ContAmtSpelledOut» Dollars (\$«ContAmtInNumeral»). Payment will be made in a lump sum amount only on approval of Facility Planning and Control.

4.

This contract may be terminated by the Owner or by mutual consent upon 30 days written notice. The Owner may also terminate this contract for cause based upon the failure of the Contractor to comply with the terms and/or conditions of the Contract; provided that the Owner shall give the Contractor written notice specifying the Contractor's failure. If within thirty (30) days after receipt of such notice, the Contractor shall not have either

corrected such failure or, in the case which cannot be corrected in thirty (30) days, begun in good faith said failure and thereafter proceeded diligently to complete such corrections, then the Owner may, as its option, place the Contractor in default and the Contract shall terminate on the date specified in such notice. The Contractor may exercise any rights available to it under Louisiana law to terminate for cause upon the failure of the Owner to comply with the terms and conditions of this contract; provided that the Contractor shall give the Owner written notice specifying the Owner's failure and a reasonable opportunity for the Owner to cure the defect.

5.

Upon completion of this contract, or if terminated earlier, all records, reports, worksheets or any other materials related to this contract shall become the property of the State.

6.

Any claim or controversy arising out of this contract shall be resolved by the provisions of LA R.S. 39:1524-1526.

7.

Contractor hereby agrees that the responsibility for payment of taxes from the funds thus received under this agreement and/or legislative appropriation shall be said Contractor's obligation and identified under tax identification number _____.

8.

The Contractor shall not assign any interest in this contract and shall not transfer any interest in same (whether by assignment or novation), without prior written consent of the Owner, provided however, that claims for money due or to become due to the Contractor from the Owner may be assigned to a bank, trust company or other financial institution without such prior written consent. Notice of any such assignment or transfer shall be furnished promptly to the Owner.

9.

It is hereby agreed that the Legislative Auditor of the State of Louisiana has the option of auditing all accounts of Contractor which relate to this contract.

10.

This contract, together with the RFP and addenda issued thereto by the Department, the proposal submitted by the Contractor in response to the Department's RFP, and any exhibits specifically incorporated herein by reference, constitute the entire agreement between the parties with respect to the subject matter.

11.

In the event of any inconsistent or incompatible provisions, this signed agreement with amendments (excluding the RFP and Contractor's proposal) shall take precedence, followed by the provisions of the RFP with addenda, and then by the terms of the Contractor's proposal.

12.

This contract shall begin after approval by Office of Contractual Review or its designee and shall terminate «ContractDays» days thereafter. The beginning date is _____ and the termination date is _____.

THUS DONE AND SIGNED at Baton Rouge, Louisiana, on the day, month, and year first written above.

WITNESSES:

STATE OF LOUISIANA
DIVISION OF ADMINISTRATION

BY:

JERRY W. JONES, DIRECTOR

«Contractor»

BY:

STATE OF LOUISIANA
PARISH OF «ParishOfContractor»

PROJECT NO. «ProjectNo»
NAME «ProjectDiscription»
«ProjectDiscrip»
«ProjectDisc»
LOCATION «CityState»

A F F I D A V I T

Before me, the undersigned authority, duly commissioned and qualified within and for the State and Parish aforesaid, personally came and appeared _____ representing «Contractor» who, being by me first duly sworn deposed and said that he has read this affidavit and does hereby agree under oath to comply with all provisions herein as follows:

PART I.

Section 2224 of Part II of Chapter 10 of Title 38 of the Louisiana Revised Statutes, as amended.

(1) That affiant employed no person, corporation, firm, association, or other organization, either directly or indirectly, to secure the public contract under which he received payment, other than persons regularly employed by the affiant whose services in connection with the construction, alteration or demolition of the public building or project or in securing the public contract were in the regular course of their duties for affiant; and

(2) That no part of the Contract price received by affiant was paid or will be paid to any person, corporation, firm, association, or other organization for soliciting the Contract, other than the payment of their normal compensation to persons regularly employed by the affiant whose services in connection with the construction, alteration or demolition of the public building or project were in the regular course of their duties for affiant.

PART II.

Section 2190 of Part I of Chapter 10 of Title 38 of the Louisiana Revised Statutes, as amended.

That affiant, if an architect or engineer, or representative thereof, does not own a substantial financial interest, either directly or indirectly, in any corporation, firm, partnership, or other organization which supplies materials for the construction of a public work when the architect or engineer has performed architectural or engineering services, either directly or indirectly, in connection with the public work for which the materials are being supplied.

For the purposes of this Section, a "substantial financial interest" shall exclude any interest in stock being traded on the American Stock Exchange or the New York Stock Exchange.

That affiant, if subject to the provisions of this section, does hereby agree to be subject to the penalties involved for the violation of this section.

SWORN TO AND SUBSCRIBED BEFORE ME THIS _____ DAY OF _____, 2008. AFFIANT

NOTARY

Exhibit B – Program Management Scope of Services

Summary

At the request of The State of Louisiana (the State or Owner), the Program Manager will provide Program Management Services outlined below for the Medical Center of Louisiana at New Orleans (MCLNO). These services are comprehensive and provide for the execution of the full scope from engagement to project closeout and Post-Occupancy Phase.

Phase I: Project Definition, Organization & Planning Phase

The following work tasks and processes will be developed and implemented in a collaborative way with State leadership and staff. The Program Manager will be careful to facilitate buy-in and goodwill during this and every subsequent phase.

- **Assemble Team.** The State feels the most important element of a successful project is the makeup of the delivery team; Owner, User Agency, Program Manager, Architect, consultants, construction contractor(s) and key subcontractors. During this phase of the project, the program manager working with the Owner will help define, select, and assemble appropriate team members consistent with project delivery strategies selected for different components of the program. Develop a comprehensive Project Directory including all contact information for each team member and update as required throughout the project.
- **Understanding.** Develop a comprehensive understanding of the project relative to the current Preliminary Program, assumptions, constraints, budget, schedule, etc. Understand each department going into the facility, how they operate, what their unique goals are and how they relate to other building occupants. Understand specific site constraints such as setbacks, utility relocations, and other limitations. Review and understand the budget and schedule assumptions and associated detail.
- **Goals and Objectives.** In conjunction with State leadership and the Architect, Program Manager will reconfirm and document the overall project goals and objectives. These typically include schedule, budget, quality, program scope, communications, guiding design principles, delivery team member selection parameters and process, reporting expectations, etc.
- **Staffing.** Provide dedicated Program Management personnel as proposed to meet the demands of the project. Serve as the State's representative in coordinating all activities of the Project Team providing overall team leadership and guidance throughout the entire process. Program Manager will provide full-time project management representation and administrative support during this phase.
- **Organizational Plan.** Provide an organizational plan and responsibility matrix for the management and control of this project that clearly identifies the responsible party for each major work activity, including the activities of the Owner, Project Delivery Team members and others pertinent to the process of project development. This includes assessment of project phasing, financial considerations, alternative delivery methods, bidding and contracting strategy, etc; to provide for the most efficient approach to delivering the overall project. Update the responsibility matrix as new members are added to the team.
- **Project Delivery Strategies.** Analyze and recommend alternative project delivery strategies (e.g., CM as Constructor, multi-prime trade contracts) for different components of the program that might offer cost, schedule, quality, and coordination benefits.
- **Planning & Programming Confirmation.** Review the activities and status of the planning and programming to date, by the architectural team, in developing the optimum operational and planning model for the facility. Oversee planning and programming review meetings. Benchmark programming with comparable state-of-the-art facilities nationally. Confirm that planning and

programming assumptions to date are consistent with State objectives and guiding principles. Review all planning and programming documents, as they are refined for compliance with expectations and contractual requirements, facilitate final balance of space program with actual space availability and budget. Include a project work plan and include relocation activities.

- **Site Acquisition, Environmental Cleanup, and Public Outreach Support.** Coordinate with third party consultants that are providing scheduling and coordination support to Owner and real estate acquisition consultants, site environmental consultants, relocation assistance consultants and consultants for Federal public outreach compliance activities.
- **Master Schedule.** Review project schedules developed to date. Develop and maintain a comprehensive Master Project Schedule to include all organization, design, land acquisition, preconstruction, construction and post occupancy services. This will be a comprehensive schedule reflecting all significant activities required to deliver the project through occupancy and post occupancy. The schedule will be designed to deliver the project as quickly as possible while complying with all State procurement requirements. The Master Schedule will be continually expanded to add and track sub-tasks to be performed by consultants and contractors.
- **Master Budget.** Review project budgets developed to date. Refine and develop a detailed preliminary Master Project Budget for the project. The Master Project Budget is intended to capture all costs of the project, serve as reporting tool and enable control of all project costs. This Master Project Budget will become the base project cost model and will be developed initially in acceptable format for easy file sharing with the State. Actual project cost control will be coordinated with the State for the optimum approach, to include cash flow projections. Recommend appropriate contingencies for inclusion in the Master Budget.
- **Project Management Control System (PMCS).** Provide an integrated, web-based PMCS to track and control project information, including contracts, costs, issue-tracking, design review, changes, payments, document control, meeting minutes, and reporting. The PMCS should be developed from a readily available, commercially developed product and customized to meet LSU and State requirements. The PMCS will be capable of “what if” scenarios to facilitate risk management and decision-making. The system will not be owned by the State or LSU, but access will be available at all times to all members of the project team during the contract period.
- **Site Considerations.** Provide advice relative to the site considerations including existing topography, parking requirements, etc. Review site analysis of the property for inclusion of complete information on surveys, topography, utilities and soil conditions, and distribute to the design team. Coordinate procurement of any additional required utility or building surveys.
- **Risk Management Planning.** Develop a detailed assessment of general and specific project risks. Provide commentary and management plan components to deal with risks, and a quantitative assessment where required.
- **Monthly Status Reports.** Develop and distribute a monthly status report to be used during the project with design progress, updated budget documentation, updated schedule documentation, and outstanding issues requiring executive action. The report will also contain a summary of the work performed by the Program Manager during the previous month.
- **Meet Weekly with State Staff.** Develop agenda and conduct a weekly meeting to review progress and update key State staff members. The update will include a summary of the past week’s activities and future activities for the coming week. It will also include key decisions required in the coming week and a summary of meetings scheduled.
- **Communication.** Develop and maintain lines of communication among internal and external team members to ensure effective communication and timely issue resolution.
- **Coordination of Efforts.** Create and implement an Action Item list complete with a distribution and accountability matrix. This tool should apply to efforts of all project participants; progress should be tracked and reported.
- **Decision-Making.** Continue to assist with refinement of existing decision making structures and practices, recommend revisions and clarifications as required to accomplish this project. Develop a

matrix for decisions at each level, defining the level at which each type of decision will be made, which body has the duty to recommend, which the duty to pursue. Develop decision support standards and methods to enable Owner staff to make consistently informed decisions.

- **3D Modeling and BIM.** Facilitate and support the implementation of 3D modeling and Building Information Modeling (BIM) or latest similar available technology.
- **Procedures.** Develop procedures as appropriate for management of the program.
- **Robert Wood Johnson Foundation.** Facilitate and support the consideration of design recommendations from consultants on behalf of the Robert Wood Johnson Foundation.
- **Real Estate Program Management.** Provide real estate program management services.
 - The State has contracted with firms to acquire the necessary real estate to construct the project if the proposed new LSU site is selected. At this time, for the LSU site it is estimated that approximately 100 parcels would need to be acquired, with approximately 90 relocations (65 residential, 25 business). Firms that are presently under contract to the State and their general scopes of services are:
 - Volkert and Associates – relocation assistance services including appraisal inspections, preliminary relocation plan, occupant inventories, relocation assistance plan inventories, residential relocation, and business relocation
 - Roedel, Parsons, Koch, Blanche, Balhoff & McCollister – legal services to represent the State in the land acquisition process, all necessary related serviced such as meeting, briefings, presentations, legal and other research, negotiations, pleadings, depositions, mediations, arbitrations and litigation (where necessary) to secure the land required for the project. Deliverables will include, among other things, cash sales or other documents sufficient for property transfers with clear title to the acquiring entity and ultimately the State.
 - Land Source, Inc. – boundary surveys.
 - U.S. Risk Management – technical assistance regarding compliance related to NEPA with completion of stand-alone reports for Section 106 review, Environmental Justice, and Noise Assessment.
 - Real estate program management services will include:
 - Development and implementation of a quality assurance plan for real estate acquisition activities in accordance with State and Federal laws, rules, codes and regulation.
 - Development and implementation of a quality assurance plan for relocation program related to relocation planning notices, advisory services, and payments.
 - Review and recommendation to the State of approval/disapproval of the contracts' deliverables.
 - Review and recommendation to the State of approval/disapproval of the contracts' invoices.
 - Recommendation to the State for just compensation (to be approved by the State).
 - Coordination of compliance with real estate acquisition and environmental clearance activities.
 - Coordination of real estate acquisition and survey activities.
 - Property management in the interim between acquisition, demolition, site preparation, etc. and construction of the project.
 - Coordination of real estate acquisition and design/construction activities.

- If the state determines that the real estate program management services should not be a part of this agreement, then the agreement would be amended to remove such services from the scope of work by an amendment to the contract.
- The fee for Real Estate Program Management services shall be a separate item in the Phase 1 scope of work.

Phase 2: Design Initiation/Preconstruction Phase

- **Staffing.** Provide dedicated Program Management personnel to accomplish proposed requirements of the project. Serve as the State's representative in coordinating all activities of the Project Team providing overall team leadership and guidance throughout the entire process. Program Manager will provide full-time project management representation and administrative support during this phase and throughout the balance of the project.
- **Process Design.** Facilitate work sessions with representatives of the State and the project Delivery Team for the purpose of defining the criteria for project success for all team members and develop common goals and objectives. Also develop a common understanding relative to project schedule and budget and associated assumptions. Confirm project team member responsibilities and document, using a Responsibility Matrix. Review and refine proposed design schedule as necessary.
- **Design Team Oversight.** Provide leadership and oversight of the design team including coordination of interface with the State. The nature of this leadership is to make certain that budget, schedule, and document coordination and quality are achieved; and that necessary integration with contractor processes occurs in a high-value manner. Coordinate and assist in negotiations of any proposed design services contracts.
- **Program Deviations.** Establish a program deviation request system to track program changes between formal drawing reviews. Update the Program Budget and Contingency Status Reports.
- **Program Advocacy/Validation.** Advocate program decisions that will maintain the budget. Propose and implement activities designed to validate program assumptions and impacts.
- **Team Meeting Leadership.** Lead regularly scheduled project meetings with members of the Project Delivery Team for the purpose of continually assessing project status, and coordinating design and budget issues. Prepare and distribute minutes of all such meetings.
- **Action Log.** Maintain the Project Team Action Log to drive and track outstanding issues and ensure timely completion.
- **User Group Meeting Leadership.** Lead all significant design and preconstruction meetings including user group meetings with the Design Team as necessary. Document specific requests of project users and monitor plan completion to coordinate that requests are incorporated within budget constraints.
- **Decision-Making Process.** Coordinate interaction and decision-making among State architects, user groups, and others necessary to project decision-making. Meet regularly with the State to continually address key decisions required and other project issues. Includes coordination and assistance with contract negotiations with consultants and vendors for construction services.
- **Code Official Review.** Participate in review meetings by Design team with building officials to develop a permit procedure for project.
- **Master Budget.** Maintain the detailed Master program Budget to address all anticipated projected costs. The Master Project Budget is intended to capture all costs of the project and serves a reporting tool for State leadership and enables control of project costs. Program Manager will maintain data on approved budget changes, commitments, expenditures to date and remaining budget amounts in a format consistent with State requirements.

- **Master Project Schedule.** Maintain the Master Project Schedule and a short-term look-ahead schedule to facilitate the overall project decision-making process. Identify key milestones for the Design Team and coordinate decision-making necessary to achieve all milestones. The Master Schedule will be continually expanded to add and track sub-tasks to be performed by consultants and contractors.
- **PMCS.** Manage and maintain the web-based Project Management Control System (PMCS) including training and supporting other Project Team members on PMCS.
- **FF&E Planning.** Facilitate determination of all requirements, as well as budget and schedule impacts for medical equipment, furnishings, and telecommunication systems. Facilitate the equipment planning process and coordination with all interested parties.
- **Cost Control.** Assist the State with developing an overall cost control system for the project including monthly reconciliation with the State. Maintain a parallel record of project costs for review by the State to serve as a permanent record. Develop and update a cash flow projection for the duration of the project.
- **Construction Cost Estimating.** Review the detailed cost estimate of construction provided by the design team and make recommendations to the State concerning approval for moving forward. Work with the State and the design team to review and update the estimate as needed to develop a final estimate at the end of the Program Completion and Schematic Design phases. This should include a detailed estimate based upon industry standard formats that can be easily transferred to or reconciled with another team member (e.g., CM as Constructor) at a later date.
- **Status Summary Reporting.** Prepare and submit to State Leadership a monthly Project Status Summary providing an executive overview of the key activities, schedule, and financial posture of the project. The Project Status Summary will address key issues requiring action, a description of the design status, and schedule and budgeting updates.
- **Department Interface.** Coordinate interface with key State departments including engineering, telecommunications, security, etc. to encourage participation with the design team.
- **Cost/Constructability Review.** Review all design phase documents and comment on constructability, coordination and value engineering issues. Coordinate all value engineering efforts on the State's behalf including facilitation of work sessions with the project team, evaluation of proposed V/E items, etc. Monitor completion of design documents to ensure all V/E items are incorporated as the project progresses.
- **Presentations.** Participate in other presentations, as necessary, to provide updates as to the project status.
- **Applications for Payment.** Review all applications for payment submitted by the Architect, engineers, consultants, vendors, etc., and provide recommendations for revisions and/or payment.
- **Design Process, Documents.** Monitor design documents relative to compliance with the approved functional program and State project objectives. Perform periodic drawing reviews to track status of the design progress and inclusion of value engineering objectives.
- **Conflicts and Disputes.** Assist in the resolution of all project-related conflicts and disputes including coordination with State legal counsel, as required. Serve as the State's representative in bringing any conflicts or disputes to rapid resolution.
- **FF & E Budget.** Review the overall equipment and furnishings budgets and understand all associated assumptions. Monitor the equipment budget as the planning process continues, to assess whether the budget is being maintained.
- **Owner-Furnished Equipment Coordination.** Assist with coordinating procurement, delivery and installation of all Owner-furnished equipment and systems in accordance with the required construction and occupancy schedule. Ensure that equipment selection discussions are made in a timely manner.
- **Preconstruction Management.** Perform preconstruction services, including review of pricing and cost estimates, and constructability issues. Perform detailed review of all construction estimates

prepared by the Architect or estimating consultant. Provide detailed parallel estimates for comparison and reconciliation with those prepared by the Architect or estimating consultant at Program Completion, Schematic Design, and Design Development. Review all assumptions and clarifications and communicate with the State any deviations from the intended scope. Should design phase estimates be over the approved budget, lead the value engineering process to get the project back in budget. Maintain a Budget Inclusion/Exclusion log to clearly define for the State what is or is not included.

- **Site Logistics Planning.** Facilitate site logistics planning, including site access, staging, traffic, deliveries, utilities, and equipment routing plan.
- **Construction Phasing and Sequencing.** Facilitate development of work packaging, phasing and sequencing of the project with the design team, to determine the most expeditious mode of project delivery. Address all potential schedule-impacting issues immediately to insure schedule goals are maintained. Oversee the development of any early construction packages and associated assumptions and qualifications.
- **Commissioning of the Building.** Assist in the scope of work development and selection of a building commissioning agent, and coordinate commissioning activities. Upon mutual agreement, commissioning services may be provided by the qualified Program Manager.
- **Regulatory Issues.** Coordinate all matters pertaining to regulatory acceptance, zoning issues, and occupancy facilitating resolution in a timely manner.
- **Pre-Qualification.** Coordinate the prequalification of construction contractors and/or subcontractors, and the preparation of subcontract bid packages and scope descriptions, if appropriate, in accordance with State guidelines.
- **Meet as determined with State staff.** Develop a standard agenda to update State leadership of progress and issues.
- **Procurement Strategies.** Coordinate and provide advice with innovative ways to speed up procurement/delivery packages.
- **3D Modeling and BIM.** Facilitate and support the implementation of 3D modeling and BIM or similar approved programs.
- **Robert Wood Johnson Foundation.** Facilitate and support the consideration of design recommendations from consultants on behalf of the Robert Wood Johnson Foundation.

Phase 3: Design Completion/Construction Commencement Phase

- **Document Coordination.** Perform a comprehensive, multidisciplinary quality assurance review of construction documents focusing on coordination and completeness of documents. Review and reconcile comments with the Owner and Architect. Lead final document review meetings to evaluate completion and proper coordination of all contract documents including confirmation of final architectural scope, incorporation of all Value Engineering items, coordination of MEP systems with Owner-furnished equipment, etc.
- **Selection Process.** Lead the selection of the construction contractor(s) and all additional consultants required for project implementation, including but not limited to development of RFQs, RFPs, analysis of proposals, managing the interview process and development of recommendations for selections in accordance with the State's unique process and objectives.
- **Construction Contract Scope.** Develop contract scope descriptions for project components to be delivered in a multiple-prime-trade contract format.
- **Agreements.** Lead the final development and negotiation of the construction contractor agreement(s). Lead the development of suitable agreements for any supplemental preconstruction and construction services if needed through a construction contractor. Lead the development of

additional agreements for all other required consultants. Coordinate with State leadership and legal counsel.

- **Bid/Award Coordination.** Review and/or develop contractor and subcontractor scope of work descriptions in construction documents. Coordinate and oversee bidding process and subsequent contractor negotiations.
- **Decision-Making Process.** Coordinate interaction and decision-making among State architects, engineers, user groups, and others necessary to project decision-making. Meet regularly with the State to continually address key decisions required and other project issues. Includes coordination and assistance with contract negotiations for construction services.
- **Master Budget.** Maintain the detailed Master Project Budget to address all anticipated projected costs. The Master Project Budget is intended to capture all costs of the project and serves a reporting tool for State leadership and enables control of project costs. Program Manager will maintain data on approved budget changes, current estimates, commitments, expenditures to date and remaining budget amounts in a format consistent with State requirements.
- **Master Project Schedule.** Maintain the Master Project Schedule and a short-term look-ahead schedule to facilitate the overall project decision-making process. Update key milestones, and coordinate decision-making necessary to achieve all milestones. The Master Schedule will be continually expanded to add and track sub-tasks to be performed by consultants and contractors.
- **PMCS.** Manage and maintain the web-based PMCS including training and supporting other Project Team members on PMCS.
- **Cost Control.** Maintain an overall cost control system for the project including monthly reconciliation with the State. Maintain a parallel record of project costs for review by the State to serve as a permanent record. Develop and update a cash flow projection for the duration of the project.
- **Value Engineering.** Lead Project Delivery Team in Value Engineering Effort.
- **Materials Testing.** Assist in soliciting proposals for materials testing services from qualified firms; develop a recommendation and an appropriate formal agreement with the selected firm. Coordinate the materials testing process and ensure it is performed on the State's behalf and in accordance with contract documents.
- **Pre-Construction Conference.** Conduct a pre-construction conference with State staff, User Agency, Architect, the construction contractor(s), any other key members of the Project Delivery Team to establish lines of communication and construction administration procedures such as the processing of Submittals, Shop Drawings, Requests for Information (RFIs), Change Proposals, etc.
- **Schedule Oversight.** Perform a detailed review of the construction contractor's proposed construction schedule and offer a critique and suggestions as to how the schedule may be improved. Meet with the construction contractors and Architect to identify any long-lead items that can be ordered early and may have a direct impact on the overall project schedule.
- **Meet weekly with project staff.** Develop an agenda for project team to review progress and discuss and resolve issues.
- **Procurement Strategies.** Coordinate and provide advice with innovative ways to speed up procurement/delivery packages.
- **3D Modeling and BIM.** Facilitate and support the implementation of 3D modeling and BIM, and facilitate the transition of BIM from design into construction.
- **Robert Wood Johnson Foundation.** Facilitate and support the consideration of design recommendations from consultants on behalf of the Robert Wood Johnson Foundation.

Phase 4: Construction Phase

- **Staffing, Representation.** Provide full-time, on-site qualified management personnel as proposed to meet the demands of the project. Serve as the State's representative in coordinating all activities of the Project Delivery Team. Program Managers will work full-time on-site, in order to effectively manage the process and respond to issues.
- **Supervise and Coordinate.** Supervise and coordinate the work on any project components delivered under multiple-prime-trade contracts model.
- **Phase Transition.** Oversee the transition between design and construction, including monitoring and tracking Requests for Information (RFIs) submitted by the construction contractors, the Architect's associated responses, and any associated clarifications requested by the construction contractors in commencing his buyout and submittal process.
- **Team Meeting Leadership.** Lead regularly scheduled project meetings with members of the Project Delivery Team for the purpose of continually assessing the project status and to ensure conformity with project costs, schedule, and performance goals. Prepare and distribute minutes of all such meetings.
- **Decision-Making Process.** Coordinate interaction and decision-making among the State, User Agency, Architect, and others necessary to project decision-making. Meet regularly with the State to continually address key decisions required and other project issues. Includes coordination and assistance with contract negotiations for construction services.
- **Master Budget.** Maintain the detailed Master program Budget to address all anticipated projected costs. The Master Project Budget is intended to capture all costs of the project and serves a reporting tool for State leadership and enables control of project costs. Program Manager will maintain data on approved budget changes, commitments, estimates, change orders, and expenditures to date and remaining budget amounts in a format consistent with State requirements.
- **Master Project Schedule.** Maintain the Master Project Schedule and a short-term look-ahead schedule to facilitate the overall project decision-making process. Update key milestones, and coordinate decision-making necessary to achieve all milestones. The Master Schedule will be continually expanded to add and track sub-tasks to be performed by consultants and contractors.
- **PMCS.** Manage and maintain the web-based PMCS including training and supporting other Project Team members on PMCS.
- **Cost Control.** Maintain an overall cost control system for the project including monthly reconciliation with the State. Maintain a parallel record of project costs for review by the State to serve as a permanent record. Develop and update a cash flow projection for the duration of the project.
- **Cost Management.** Actively manage all aspects of cost during the construction phase, including development and implementation of a contingency management/tracking tool. Review all requests for change with existing contract scopes to determine that the State receives everything contracted for under the base contracts.
- **Monitor, Analyze, Recommend.** Continually monitor and analyze the construction effort, focusing on conformity with project costs and scheduled goals. Additionally, assist the Architect in monitoring work in place relative to compliance with contract documents and corrective action resulting from inspections. Monitor the architectural and engineering teams to ensure they are performing appropriate on-site inspections and review their reports relative to non-compliant work and corrective actions by the construction contractors. Monitor that all non-compliant work identified during the construction of the project has been corrected prior to substantial completion.
- **QA Inspections and Commissioning Support.** Perform independent, full-time quality assurance inspections, and coordinate work of independent testing agencies. Consult on corrective actions, and support the work of Commissioning agent. Monitor the completion of punchlist items by the construction contractor.

- **Manage Information Flow.** Monitor timely responses from the Project Delivery Team to the construction contractor's Request for Information (RFIs). Identify potential liabilities in the RFIs, which could develop into future requests for change orders.
- **Monitor Implementation of State Safety Plan.** Monitor the establishment of site safety procedures, including interim life safety measures, in accordance with State requirements. Monitor that the construction contractor complies with all such requirements.
- **Applications for Payment.** Review all applications for payment submitted by the Architect, consultants, construction contractor, vendor, etc., and make recommendations for revisions and/or payment.
- **Designer Inspection Support.** Monitor required Architect interim and final inspections and in the completion of all corrective work. Review the Architect's development of an appropriate punchlist of outstanding items to be corrected at the time of substantial completion.
- **Project Status Summary.** Prepare and submit to the State a monthly Project Status Summary providing an executive overview of the key activities, schedule, and financial posture of the project. Report monthly to the State. The Project Status Summary will address key issues requiring action, description of the design status, and schedule and budget updates.
- **Shutdowns Coordination.** Facilitate the coordination of any utility shutdowns and other issues with appropriate governing agencies.
- **Change Requests.** Review all change proposal requests submitted by the construction contractor to the design team, including providing independent check estimates on major change order requests, and make recommendations for revision or approval. This does not relieve any responsibility on the part of the Architect to fully review and recommend the change order requests.
- **3D Modeling and BIM.** Facilitate and support the implementation of 3D modeling and BIM.

Phase 5: Occupancy/Post-Occupancy Phase

- **Staffing, Representation.** Provide full-time on-site qualified management personnel as required to meet the demands of the project. Serve as the State's representative in coordinating all activities of the Project Delivery Team. Program Managers will work full-time on-site, in order to effectively manage the process and respond to issues.
- **Phase Transition.** Oversee the transition between construction and occupancy/post occupancy.
- **Move-in and Occupancy.** Assist with coordinating move, occupancy and relocation activities. This includes development and maintenance of a Move/Occupancy Checklist to serve as a coordinating document establishing responsibilities and timelines for all parties associated with move and occupancy. Activities to be coordinated include furniture and equipment, delivery and installation, systems testing, training sessions, etc. Participate in regular Move Team coordination meetings to ensure all deadlines are met. Provide full-time, on-site coordination during key move events to ensure successful completion. Assist the State with confirming facility readiness.
- **Team Meeting Leadership.** Lead regularly scheduled project meetings with members of the Project Delivery Team for the purpose of continually assessing the project status and to ensure conformity with project costs, schedule, and performance goals. Prepare and distribute minutes of all such meetings.
- **Cost Management.** Actively manage all aspects of cost during the occupancy phase, including development and implementation of a contingency management/tracking tool. Validate all requests for change with existing contract scopes to make certain that the State receives everything contracted for under the base contracts.

- **Manage Information Flow.** Monitor timely responses from the Project Delivery Team to the construction contractor's Request for Information (RFIs). Identify potential liabilities in the RFIs, which could develop into future requests for change orders.
 - **Applications for Payment.** Review all applications for payment submitted by the Architect, consultants, construction contractor, vendor, etc., and make recommendations for revisions and/or payment.
 - **Inspections Assistance.** Review the Architect's performance of final inspections and in monitoring all corrective work. Review the Architect development of an appropriate punchlist of outstanding items to be corrected at the time of substantial completion. Review the completion of punch list items by the construction contractor.
 - **Project Status Summary.** Prepare and submit to the State a monthly Project Status Summary providing an executive overview of the key activities, schedule, and financial posture of the project. Report monthly to the Project Leadership Team. The Project Status Summary will address key issues requiring action, description of the design status, and schedule and budget updates.
 - **Commissioning of the Building.** Support the work of the commissioning agent, including assisting in the start-up, shakedown performance testing, and cutover of systems and equipment. Upon mutual agreement, commissioning services may be provided by the qualified Program Manager.
 - **Change Requests.** Review all change proposal requests submitted by the construction contractor and make recommendations for revision or approval.
 - **Inspections and Regulatory Issues.** Assist in coordinating the State's interaction with the appropriate governing authorities relative to construction issues, agency inspections, etc. Coordinate procurement of state and local regulatory inspections and approvals in a timely fashion in order to meet the required schedule.
 - **Start-up.** Monitor the work of the Architect in his role in assisting the construction contractor in providing troubleshooting during initial occupancy and subsequent periods until proper operations are established and building maintenance and operating personnel are properly trained.
 - **Closeout.** Monitor the completion of all project closeout activities including submittal of operation manuals, warranties, and as-built drawings. Conduct final project cost reconciliation with the State.
 - **Meet weekly with State key project staff.** Update State leadership on progress and issues.
- 3D Modeling and BIM.** Monitor final as-builts and turnover to Owner

Required Deliverables (many of the following consist of an initial item and continuing updates):

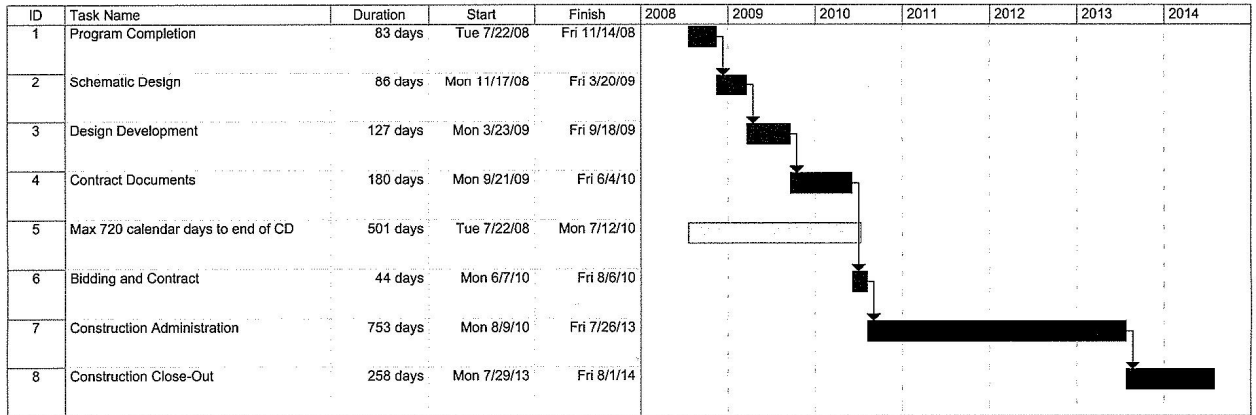
- Master project schedule, critical path method
- Master project budget
- Monthly executive status report
- Project team responsibility matrix
- Project team directory
- Document distribution matrix
- Weekly project team meeting minutes
- Milestone estimates
- Design review reports
- Action logs
- Change proposal log
- Budget inclusion/exclusion log
- Meeting agendas
- Owner-Architect, construction contractor, and miscellaneous consultant agreements

- Partnering agreement
- Value Engineering log
- Inspection reports
- Closeout documents checklist
- Move/occupancy checklist
- Measurable value-added summary
- Contingency-tracking log
- Commissioning activities and results

Exhibit C – Preliminary Schedule

MCLNO PROJECT PROJECT SCHEDULE

22 JUL 2008



Note: The design team is under contract and on schedule as presented in the preliminary design and construction schedule shown above. It is expected the Program Manager will join the project at the end of Schematic Design or the beginning of Design Development. The Program Manager will be responsible for including the coordination of Real Estate management services (land acquisition, site preparation, relocation of utilities, streets, etc.) in the overall schedule based on information from state retained consultants.

Exhibit D – Construction Budget Summary

<u>Part</u>	<u>Available for Construction (AFC)</u>
Hospital Building	\$344,365,960
Ambulatory Care Building	\$103,869,840
Central Energy Plant	\$27,048,000
Structured Parking	\$43,939,200
Connectors	\$8,390,400
Site Work	\$41,731,200
Medical Equipment	\$93,877,395
Furniture	\$24,076,950
IT	\$66,172,374
Signage	\$750,000
TOTAL	\$754,221,319

Exhibit E – Acknowledgement of Addenda

REQUEST FOR PROPOSALS

**Program Management Services
New Facilities for the
Medical Center of Louisiana at New Orleans
LSU Health Care Services Division
New Orleans, LA
State Project No. 19-610-06B-04, Part 12**

Authorized Representative: Initial in the blank provided for each addendum received.

Addendum #1 _____

Addendum #2 _____

Addendum #3 _____

Addendum #4 _____

Addendum #5 _____

Addendum #6 _____

By: _____
(Authorized Representative's signature)

Name: _____
(print or type)

Date: _____

Exhibit F – Breakdown of Fee

The Fee Proposal should be broken down as follows:

Lump sum total fee – Include an estimated breakdown of man-hours and rates for each employee by project phase.

Please note the Real Estate Program Management services in Phase 1 should be separately itemized within the Phase 1 work in the event that portion of the work is not awarded.

The personnel listed are intended to be by general category (i.e. project coordinator, estimator, scheduler, document reviewer, administrative assistant, clerical, etc.)

Complete breakdown of expected reimbursable expenses – Include a complete listing of material, services, and/or equipment for which you will expect to be reimbursed.

Breakdown of Fee - Phase 1

Personnel assigned	Anticipated Hours	Rate	Total
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Reimbursable Expenses:

Add additional pages as required

Breakdown of Fee - Phase 1 Real Estate Services

Personnel assigned	Anticipated Hours	Rate	Total
---------------------------	--------------------------	-------------	--------------

Reimbursable Expenses:

Add additional pages as required

Breakdown of Fee - Phase 2

Personnel assigned	Anticipated Hours	Rate	Total
---------------------------	--------------------------	-------------	--------------

Reimbursable Expenses:

Add additional pages as required

Breakdown of Fee - Phase 3

Personnel assigned	Anticipated Hours	Rate	Total
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Reimbursable Expenses:

Add additional pages as required

Breakdown of Fee - Phase 4

Personnel assigned	Anticipated Hours	Rate	Total
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Reimbursable Expenses:

Add additional pages as required

Breakdown of Fee - Phase 5

Personnel assigned	Anticipated Hours	Rate	Total
---------------------------	--------------------------	-------------	--------------

Reimbursable Expenses:

Add additional pages as required