The Board of Regents of the University of Wisconsin System (Universities of Wisconsin) is seeking interested firms qualified to provide Space Planning, Utilization, and Demand Study Services for institutions of higher learning to submit a Statement of Qualifications (SOQ) for the UW-Madison Space Utilization and Demand Study.

SOQs are due by 2:00 pm CT, **April 24, 2024.** The Universities of Wisconsin anticipates awarding the project to the selected Firm within May, and work is expected to begin immediately upon an executed contract.

Project Description

A space utilization and demand study for office, classroom, class lab, and research lab space at UW-Madison. The Universities of Wisconsin and UW-Madison (collectively UW) aim to understand current and projected space utilization and demand and receive recommendations on space policies and procedures to improve utilization and support productivity.

In addition, the final report shall include change management strategies, implementation recommendations, estimated implementation costs, future operating costs, and the recommended guidelines, policies, and scenarios, as well as comparisons to current/traditional assignment and operational models.

Background and Purpose

Office Space

UW believes there is an opportunity to increase office space utilization by allocating space according to newly distributed hybrid and remote work models.

UW is seeking a consultant to conduct an office space study for all UW-Madison staff in owned and leased facilities on the main campus and within Dane County. The study will evaluate office space utilization and current and projected demand and recommend workspace concepts and policy and process changes to improve office space utilization and operational efficiency.

Building Data – Office Space

This portion of the study will focus on office space categorized by UW-Madison according to the Department of Education's Facility Inventory Classification Manual (FICM) standards. UW-Madison has approximately 3.5M assignable square feet of office space occupied by 42 divisions and 450 departments across 230 buildings. See Appendix (attached) for specific building information and scope details.

Employee office space assignments will be collected for all owned and leased spaces on the main campus and within Dane County. As noted in the Scope of Services, onsite walk-throughs and utilization sampling will be limited to a subset of the buildings.

Classrooms

Based on UW-Madison key performance indicators (KPIs), UW classrooms are underutilized. We are seeking recommendations on improving space utilization and maintaining quality instruction.

We seek a consultant to conduct a classroom space study for all UW-Madison classrooms and evaluate classroom utilization and demand, condition, functionality, scheduling policy and procedures, and operational models. The study will recommend classroom planning guidelines, projected demand, and policies and procedures to improve classroom space utilization, operational efficiency, and learning outcomes in owned facilities on the main campus.

Building Data – Classrooms
This portion of the study will focus on both general assignment and departmentally assigned classroom space as categorized by UW-Madison according to FICM standards. UW-Madison has approximately 640 classrooms totaling 620,000 assignable square feet assigned to 18 divisions and 70 departments across 86 buildings. See Appendix (attached) for specific building and space information and scope details.

Classroom schedules and utilization information will be collected for all classrooms on the main campus. However, as noted in the Scope of Services, onsite walkthroughs and utilization sampling will be limited to a subset of the buildings.

Class Labs
Based on UW KPIs, UW-Madison academic lab spaces are underutilized. We are seeking recommendations on improving space utilization and maintaining quality instruction.

We seek a consultant to conduct a space study for all UW-Madison class labs and evaluate lab space utilization and demand, lab space consumption by existing lab typologies (i.e., wet v. dry), operational models, conditions, and functionality. The study will recommend class lab space concepts, planning guidelines, and policy and process changes to improve class lab space utilization, operational efficiency, and mission delivery in owned facilities on the main campus.

Building Data – Class Labs,
This portion of the study will focus on class lab and class lab service space as categorized by UW-Madison according to FICM standards. UW-Madison has approximately 900 class labs (376) and service rooms (524) totaling 512,000 assignable square feet assigned to 16 divisions and 73 departments across 57 buildings. See Appendix (attached) for specific building and space information and scope details.

Class lab schedules and utilization information will be collected for all owned classrooms on the main campus. Onsite walk throughs and utilization sampling will be limited to a subset of the buildings as noted in the Scope of Services.

Research Labs
We believe there is an opportunity to increase the utilization of existing research lab space and improve UW-Madison's ability to deliver high-quality lab space to meet research demands.

We are seeking a consultant to conduct a space study for all UW-Madison research labs – wet, dry, computational, etc. - and evaluate lab space utilization and demand, financial productivity of lab space ($/SF), lab space consumption by existing lab typologies, operational models, and functionality. The study will recommend research lab space concepts, planning guidelines, and policy and process changes to improve lab space utilization, operational efficiency, and research mission delivery in owned and leased facilities on the main campus and owned and leased facilities within Dane County.

Building Data – Research Labs
This portion of the study will focus on research lab and research lab service space as categorized by UW-Madison according to FICM standards. UW-Madison has approximately 2.2M assignable square feet of research lab space occupied by 16 divisions and 142 departments across 109 buildings. See Appendix (attached) for specific building information and scope details.

Principal investigator and research staff space assignments will be collected for all owned and leased spaces

on the main campus and within Dane County. As noted in the Scope of Services, onsite walkthroughs and utilization sampling will be limited to a subset of the buildings.

Project Budget
Total Project Cost $3,750,000

Funding Source
This is a 100% grant funded project. Contracts will be held by the Board of Regents of the University of Wisconsin.

Project Schedule
Firm Selection: May 2024
Draft Report: May 2025
Final Report: July 2025

Scope of Services

1. Office Space Tasks.

1.1. Collect and analyze office space information.
- 1.1.1. Visit a representative subset of UW's office portfolio to understand current typologies, general condition and quality, and to identify potential challenges and opportunities related to utilization. The subset will be defined collaboratively by the UW and the consultant.
- 1.1.2. The subset should represent a mix of facilities, departments, and disciplines.
- 1.1.3. The consultant should identify condition and/or functional issues discovered during their work that may be impacting utilization but is not expected to do full condition or functional rating assessments.
- 1.1.4. See Appendix for scope details.

1.2. Collect and analyze remote work agreements.
- 1.2.1. UW-Madison will supply remote work documentation and data.
- 1.2.2. Identify the current amount of remote and onsite work.
- 1.2.3. Map remote work data to standard UW-Madison position descriptions.
- 1.2.4. See Appendix for sample data.

1.3. Collect and analyze employee home locations (by zip code).
- 1.3.1. UW-Madison will supply employee zip codes.
- 1.3.2. UW-Madison will supply a biannual multi-modal transportation survey history.
- 1.3.3. Identify and document employee distance from and possible routes to assigned office space.
- 1.3.4. Conduct employee survey targeted at select employees or employee groups based on current office location and/or home location to:
  - 1.3.4.1. Understand existing and preferred transportation methods, frequency, and duration.
  - 1.3.4.2. Assess potential transportation methods for possible satellite hybrid office locations.
- 1.3.5. Analyze and identify the current and projected transportation and environmental impacts of hybrid and remote work.
- 1.3.6. Engage with UW-Madison Transportation Services to understand current operational and business models.
  - 1.3.6.1. Identify high-level operational and financial model impacts of possible hybrid office

locations.

1.3.7. See Appendix for sample data.

1.4. Collect office space utilization data via onsite monitoring (electronic and/or in person) in select buildings.
- 1.4.1. Compare and analyze collected utilization data and employee office space assignments and remote work data.
- 1.4.2. See Appendix for scope details.

1.5. Identify current and projected office space demand 2, 4, 6, 10 years out.

1.6. Engage campus stakeholders to understand and document.
- 1.6.1. Leadership goals and direction.
- 1.6.2. Current divisional, departmental, and employee office space experience, management, processes, and future needs.

1.7. Collect and evaluate office space benchmark data and related information.
- 1.7.1. Collect office space guidelines and utilization benchmark information from peer higher education and Universities of Wisconsin institutions.
- 1.7.2. Analyze benchmark information and integrate it into UW-Madison office space recommendations.
- 1.7.3. Compare benchmark information to traditional and recommended office space planning and assignment guidelines.

1.8. Develop and recommend:
- 1.8.1. Office space planning guidelines and assignment criteria incorporating work modalities (i.e., hybrid, onsite, remote) and workstyles (i.e., focused, collaborative, etc.)
- 1.8.2. Typical office environment standards for space arrangement, including furniture, fixtures, and equipment (FF&E), audio-visual setups (AV), and technology.
- 1.8.3. Sustainability approach aligned with noted DFD guidelines - https://doa.wi.gov/Pages/DoingBusiness/Sustainability.aspx.
- 1.8.4. Campus-shared hybrid workspace concepts, locations (on or off the main campus), and operational management
- 1.8.5. Office space allocation policies, guidelines, and practices and identify corresponding space, financial, and environmental impacts.
- 1.8.6. Office space utilization measures and operational processes to maintain them.
- 1.8.7. Future state office space scenario including but not limited to:
  - 1.8.7.1. Projected office demand 2, 4, 6, and 10 years out.
  - 1.8.7.2. Campus-shared workspace implementation and associated costs and impacts.
  - 1.8.7.3. Opportunities to repurpose and/or dispose of underutilized office space with associated costs and impacts.

2. Classrooms Tasks

2.1. Document existing classroom quantities, typologies, locations, and operational support models by school, college, and division.
- 2.1.1. UW-Madison will supply the existing building and space records for all classroom space.
- 2.1.2. Visit a representative subset of UW's classroom portfolio to understand current typologies, general condition and quality, and to identify potential challenges and opportunities related to utilization.
  - 2.1.2.1. The subset will be defined collaboratively by the UW and the consultant.
  - 2.1.2.2. The subset should represent a mix of facilities, departments, and disciplines.

2.1.2.3. The consultant should identify condition and/or functional issues discovered during their work that may be impacting utilization but is not expected to do full condition or functional rating assessments.

2.1.3. The selected consultant will organize and maintain this data for the study.

2.1.4. All collected data and drawing updates discovered during the study will be shared back to UW-Madison for entry into their administrative systems outside of the study scope.

2.1.5. See Appendix for scope details and existing data examples.

2.2. Document current classroom utilization and trends from fall 2021-22 through spring 2023-24 using Universities of Wisconsin measures and KPIs and recommended best practices for the classrooms provided in Task 2.1.

2.2.1. UW-Madison will provide all for-credit course section schedules and enrollment information.

2.2.2. The consultant will be responsible for collecting all non-credit classroom reservation information from the managing departments and their scheduling software and/or systems.

2.2.3. Utilization must be calculated according to Universities of Wisconsin standards using weekly room periods as the base unit of time.

2.2.3.1. The consultant will also recommend and provide other utilization measures based on best practices beyond the Universities of Wisconsin standards.

2.2.4. See Appendix for scope details and existing data examples.

2.3. Collect classroom utilization data via onsite monitoring (electronic and/or in person) in select buildings.

2.3.1. Compare and analyze collected utilization data and credit and non-credit classroom reservation data and classroom physical and functional conditions.

2.3.2. See Appendix for scope details.

2.4. Engage campus stakeholders to understand and document:

2.4.1. Leadership goals and direction.

2.4.2. Current divisional, departmental, instructor, and student space experience, management, processes, and future needs.

2.5. Collect and evaluate classroom space benchmark data and related information.

2.5.1. Collect classroom guidelines and utilization benchmark information from peer higher education institutions.

2.5.2. Analyze benchmark information relative to tasks 2.1, 2.2, and 2.3 and integrate it into UW-Madison classroom space recommendations.

2.5.3. Compare benchmark information to traditional and recommended classroom planning and assignment guidelines.

2.6. Identify classroom space surplus/deficit overall and by typology, size, and location.

2.7. Develop and recommend:

2.7.1. Classroom definitions, typologies, space planning guidelines, and general versus departmental assignment criteria.

2.7.2. Typical classroom environment standards for space arrangement including FF&E and technology.

2.7.3. Sustainability approach aligned with noted DFD guidelines.

2.7.4. Classroom scheduling policies, guidelines, and practices and identify corresponding space, financial, and environmental impacts.

2.7.5. Classroom space utilization measures and operational processes to maintain them.

2.7.6. Future state classroom space scenario including but not limited to:
- 2.7.6.1. Projected classroom demand 2, 4, 6, and 10 years out.
- 2.7.6.2. Target classroom quantities, typologies, sizes, and locations associated with costs and impacts.
- 2.7.6.3. Operational and support model(s) and required resources.
- 2.7.6.4. Classroom refresh and capital renewal cycle including furniture, finishes, and technology.
- 2.7.6.5. Opportunities to repurpose and/or dispose of underutilized classroom space with associated costs and impacts.

3. Class Labs Tasks

3.1. Document existing class lab quantities, typologies (i.e., wet v. dry), locations, and operational support models by school, college, and division.
- 3.1.1. UW-Madison will supply the existing building and space records for all class lab space.
- 3.1.2. Visit a representative subset of UW's class lab portfolio to understand current typologies, general condition and quality, and to identify potential challenges and opportunities related to utilization.
  - 3.1.2.1. The subset will be defined collaboratively by the UW and the consultant.
  - 3.1.2.2. The subset should represent a mix of facilities, departments, and disciplines.
  - 3.1.2.3. The consultant should identify condition and/or functional issues discovered during their work that may be impacting utilization but is not expected to do full condition or functional rating assessments.
- 3.1.3. The selected consultant will organize and maintain this data for the study.
- 3.1.4. All collected data, drawings, and data updates discovered during the study will be shared back to UW-Madison for entry into their administrative systems outside of the study scope.
- 3.1.5. See Appendix for scope details and existing data examples.

3.2. Document current class lab utilization and trends over the past six fall and spring semesters using Universities of Wisconsin measures and KPIs and recommended best practices for the class labs provided in Task 3.1.
- 3.2.1. UW-Madison will provide all for-credit course section schedules and enrollment information.
- 3.2.2. The consultant will be responsible for collecting all non-credit class lab reservation information from the managing departments and their scheduling software and/or systems.
- 3.2.3. Utilization must be calculated according to Universities of Wisconsin standards using weekly room periods as the base unit of time.
  - 3.2.3.1. The consultant will also recommend and provide other utilization measures based on best practices beyond the Universities of Wisconsin standards.
- 3.2.4. See Appendix for scope details and existing data examples.

3.3. Collect class lab utilization data via onsite monitoring (electronic and/or in person) in select buildings.
- 3.3.1. Compare and analyze collected utilization data, credit and non-credit class lab reservation data, and classroom physical and functional conditions.
- 3.3.2. See Appendix for scope details.

3.4. Engage campus stakeholders to understand and document:
- 3.4.1. Leadership goals and direction.
- 3.4.2. Current divisional, departmental, instructor, and student space experience, management, processes, and future needs.

3.5. Collect and evaluate class lab space benchmark data and related information.

3.5.1. Collect class lab guideline and utilization benchmark information from peer higher education institutions.
3.5.2. Analyze benchmark information relative to tasks 3.1, 3.2, and 3.3 and integrate it into UW-Madison class lab space recommendations.
3.5.3. Compare benchmark information to traditional and recommended class lab planning and assignment guidelines.

3.6. Identify class lab space surplus/deficit overall and by typology, size, and location.

3.7. Develop and recommend:
3.7.1. Class lab definitions, typologies, space planning guidelines, and assignment criteria.
3.7.2. Typical class lab environment standards for space arrangement including FF&E and technology.
3.7.3. Sustainability approach aligned with noted DFD guidelines.
3.7.4. Class lab scheduling policies, guidelines, and practices and identify corresponding space, financial, and environmental impacts.
3.7.5. Class lab space utilization measures and operational processes to maintain them.
3.7.6. Future state class lab space scenario including but not limited to:
3.7.6.1. Projected class lab demand 2, 4, 6, and 10 years out.
3.7.6.2. Target class lab quantities, typologies, sizes, and locations associated with costs and impacts.
3.7.6.3. Operational and support model(s) and required resources.
3.7.6.4. Class lab refresh and capital renewal cycle including furniture, finishes, and technology.
3.7.6.5. Opportunities to repurpose and/or dispose of underutilized class lab space with associated costs and impacts.

4. Research Labs Tasks

4.1. Collect research lab space assignments for all UW-Madison principal investigators and research lab staff at owned and leased facilities on the main campus and owned and leased facilities within Dane County.
4.1.1. Approximately 1,900 Principal Investigators (PIs) and 8,100 lab spaces totaling +/- 2.2 million square feet.
4.1.2. UW-Madison will supply:
4.1.2.1. A list of employees including division and department information and principal investigator status.
4.1.2.2. Building and space records including departmental space assignments.
4.1.3. The consultant will organize and maintain this data for the study.
4.1.4. All collected data, drawings, and data updates discovered during the study will be shared back to UW-Madison for entry into their administrative systems outside of the study scope.
4.1.5. See Appendix for scope details and existing data examples.

4.2. Document existing research lab quantities, typologies (i.e., wet v. dry), locations, and operational support models by school, college, division, and by research discipline.
4.2.1. UW-Madison will supply existing building and space records for all research space.
4.2.2. Visit a representative subset of UW's research lab portfolio to understand current typologies, general condition and quality, and to identify potential challenges and opportunities related to utilization.
4.2.2.1. The subset will be defined collaboratively by the UW and the consultant.
4.2.2.2. The subset should represent a mix of facilities, departments, and disciplines.
4.2.2.3. The consultant should identify condition and/or functional issues discovered during their

work that may be impacting utilization but is not expected to do full condition or functional rating assessments.

4.2.3. See Appendix for scope details and existing data examples.

4.3. Collect and review research financial data for the past five years.
- 4.3.1. UW-Madison will provide financial data.
- 4.3.2. Analyze the research financial data and research space assignments and utilization.
- 4.3.3. See Appendix for scope details and existing data samples.

4.4. Collect research space utilization data via onsite monitoring (electronic and/or in person) in select buildings.
- 4.4.1. Compare and analyze collected utilization data and PI and research staff space assignments and research financial and space analysis.
- 4.4.2. See Appendix for scope details.

4.5. Identify current and projected research lab space demand (2, 4, 6, 10 years out).

4.6. Engage campus stakeholders to understand and document:
- 4.6.1. Leadership goals and direction.
- 4.6.2. Current divisional, departmental, and principal investigator research lab space experience, management, processes, and future needs.

4.7. Collect and evaluate research lab space benchmark data and related information.
- 4.7.1. Collect research lab space guidelines and utilization benchmark information from peer higher education institutions.
- 4.7.2. Analyze benchmark information relative to tasks 4.1, 4.2, 4.3, and 4.4 and integrate it into UW-Madison research lab space recommendations.
- 4.7.3. Compare benchmark information to traditional and recommended research lab planning and assignment guidelines.

4.8. Develop and recommend:
- 4.8.1. Research lab definitions, typologies, space planning guidelines, and assignment criteria.
- 4.8.2. Typical research lab environment standards for space arrangement including FF&E and technology.
- 4.8.3. Sustainability approach aligned with noted DFD guidelines.
- 4.8.4. Shared research lab space concepts, locations (on or off main campus), and operational management.
- 4.8.5. Research lab space allocation policies, guidelines, and practices and identify corresponding space, financial, and environmental impacts.
- 4.8.6. Research lab space utilization measures and operational processes to maintain them.
- 4.8.7. Future state research lab space scenario including but not limited to:
  - 4.8.7.1. Projected research lab demand 2, 4, 6, and 10 years out.
  - 4.8.7.2. Shared research lab space implementation and associated costs and impacts.
  - 4.8.7.3. Opportunities to repurpose and/or dispose of underutilized research space with associated costs and impacts.

Project Deliverables

Section 1 – Office Space deliverables will include:

- Task 1.1 data and updates are due as they are completed.
- Primary deliverable is a final report. The report should include the following:
  - Draft table of contents and document format.
  - Draft preliminary document (30% draft).
  - Preliminary document (60% draft).
  - Draft the final document (100% draft) and provide five (5) printed hard copies.
  - The final document will include all the planning and analysis criteria, facility database information, capital improvement plan, and all other documents required to provide a comprehensive plan. It will also include a comprehensive list of projects or improvements with a recommended schedule and sequence for execution and planning-level cost estimates. The document will also include all text, database, raw and processed data, and graphics.
- An executive summary that summarizes findings, goals, principles, and key recommendations, and can be used as a stand-alone document.
- A minimum of five (5) workspace drawings and/or vignette sketches for recommended concepts.

Section 2 – Classrooms deliverables will include:

- See deliverable details noted scope section.
  - Deliverables for Task 2.1 are due as they are completed.
- Deliverables for Task 2.2-2.7 should be included in the final report. The final report should include:
  - Draft table of contents and document format.
  - Draft preliminary document (30% draft).
  - Preliminary document (60% draft).
  - Draft final document (100% draft) and provide five (5) printed hard copies.
  - Final document to include all the planning and analysis criteria, facility database information, capital improvement plan, and all other documents required to provide a comprehensive plan. It includes a comprehensive list of projects or improvements with a recommended schedule and sequence for execution and planning level cost estimates. It also includes all text, database, raw and processed data, and graphics.
- An executive summary that summarizes findings, goals, principles, and key recommendations, and can be used as a stand-alone document.
- A minimum of five (5) workspace drawings and/or vignette sketches for recommended concepts

Section 3 – Class Labs deliverables will include:

- See deliverable details noted scope section.
  - Deliverables for Task 3.1 are due as they are completed.
- Deliverables for Task 3.2-3.7 should be included in the final report. The final report should include:
  - Draft table of contents and document format.
  - Draft preliminary document (30% draft).
  - Preliminary document (60% draft).
  - Draft final document (100% draft) and provide five (5) printed hard copies.
  - Final document to include all the planning and analysis criteria, facility database information, capital improvement plan, and all other documents required to provide a comprehensive plan. It includes a comprehensive list of projects or improvements with a

recommended schedule and sequence for execution and planning level cost estimates. It also includes all text, database, raw and processed data, and graphics.

- An executive summary that summarizes findings, goals, principles, and key recommendations, and can be used as a stand-alone document.
- A minimum of five (5) workspace drawings and/or vignette sketches for recommended concepts

Section 4 – Research Labs deliverables will include:

- See deliverable details noted scope section.
  - Deliverables for Tasks 4.1 and 4.2 are due as they are completed.
- Deliverables for Task 4.3-4.8 should be included in the final report. The final report should include:
  - Draft table of contents and document format.
  - Draft preliminary document (30% draft).
  - Preliminary document (60% draft).
  - Draft final document (100% draft) and provide five (5) printed hard copies.
  - Final document to include all the planning and analysis criteria, facility database information, capital improvement plan, and all other documents required to provide a comprehensive plan. It includes a comprehensive list of projects or improvements with a recommended schedule and sequence for execution and planning level cost estimates. It also includes all text, database, raw and processed data, and graphics.
- An executive summary that summarizes findings, goals, principles, and key recommendations, and can be used as a stand-alone document.
- A minimum of five (5) research lab drawings and/or vignette sketches for each recommended concept.

Qualification Requirements

Interested consultants are to have, or assemble, a team of consultants who have higher education experience in the execution of similar space utilization studies, space plans, and/or facility master or comprehensive plans.

Consultants are to have specific expertise and experience in space utilization studies for higher education institutions. Consultants should indicate specific projects from past experience (including size, cost, and completion date) in their Statement of Qualifications (SOQ) and when known, include proposed consulting partners and specialty consultants.

Well-qualified teams will have either the prime consultant or a sub-consultant with the following experience:

- Higher Ed Space Planning and Utilization
- Change Management
- Data Collection & Analysis
- Strategic Consultation
- Sustainability & Wellbeing
- Architecture/Interior Programming

The consultant team should strive to meet at least 5% participation by minority-owned, women-owned, and/or disabled veteran-owned businesses (MBE, WBE, and DVB) as defined by Wisconsin Statute 16.18, and identified on the Wisconsin Supplier Diversity website: http://www.doa.state.wi.us/Divisions/Enterprise-Operations/Supplier-Diversity-Program or_use the State of Wisconsin Department of Transportation list of DBE certified firms.

https://wisconsindot.gov/Pages/doing-bus/civil-rights/dbe/certified-firms.aspx

Selection Process

Using the criteria listed below, a selection committee will evaluate and rank the firms. The selection committee will be made up of five (5) UW staff. If the selection committee determines more information is necessary, any or all of the following may be pursued: follow-up questions and/or interviews with a short-listed subset of the submitting firms. If selected for interviews, the firm(s) selected must be available to meet with the selection committee on May 6, with the time to be scheduled no later than May 2. This will be a virtual interview.

In a higher education environment, define your organization's experiences, benchmarks and technology used, and reporting outputs from past projects for the following:

- Space inventory data collection - office assignments, lab assignments
- Remote Work Analysis
- Scheduled space utilization and assessment
- Assess utilization based on productivity measures (research experience, etc.)
- Establish demand models and compare to utilization
- Engage with leadership and staff to understand priorities and operational environment
- Understand enough of the portfolio and conditions to make recommendations on space use and policy
- Recommend utilization measures and targets
- Recommend space policy and governance changes to optimize the use of existing space and inform future space planning

All firms will be notified within one week of the committee's selection meeting which is expected to occur the week of May **06, 2024.**

The selected firm should be prepared for a project kickoff meeting on **May 16, 2024.** The exact time will be communicated.

The contract for professional services will use a modified AIA Contract B102 (which can be found at: https://www.wisconsin.edu/procurement/download/B102-2017---240320.pdf) along with the posting documents. Requested exceptions to contract must be submitted with the SOQ and may be used in the selection process.

Submitting Qualifications

The firm is to submit a Statement of Qualifications (SOQ) using the Federal SF330 form Part I and Part II, to the below Procurement Contact. An electronic copy must be received by email no later than the deadline of **April 24, 2024, 2:00pm CT.**

Submittals are to be combined into one PDF file named with the Universities of Wisconsin project number listed at the top of this Request for Qualifications (RFQ) and include the firm's name. Limit the total number of pages submitted to 40, using a font size no smaller than 10-point. Use the "print" feature of Adobe Acrobat or similar software for creating a PDF, rather than using a scanner. If possible, please reduce/optimize the file size of the PDF, and in no case are submittals to exceed Universities of Wisconsin's incoming email attachment limit of 20MB.

Within the Federal SF330, Part I, Section E, please provide resumes for at least the following key personnel:

1. Principal in charge
2. Project point-of-contact

For Part I, Section F, ideally supply only three (3) example projects, with a maximum of five (5) projects. Please list relevant projects that best represent your firm's ability to deliver this type of space utilization study and recommendations. Pay particular attention to projects that the proposed team members have completed together.

Within the Federal SF330, Part I, section H, please answer the following questions for your SOQ to be fully considered.

1. Describe any constraints or issues you see with this project.
2. Describe your data collection techniques.
3. Describe your success in working with higher ed institutions on similar projects.
4. Describe how you would understand the UWs culture and how it would influence your approach towards accomplishing the defined goals.
5. Provide references for at least one project that included 10,000 or more WAPs and/or sensors.

If the UW requests any clarifications to the SOQ, it expects a prompt response from the firm for the firm's continued consideration. The UW reserves the right to reject a SOQ or proposal that is incomplete or late, and to cancel the project selection for any reason.

Submit all questions regarding this RFQ in writing to the Procurement Contact with the project name and project number included in the subject line (no phone calls please). Questions will be posted and answered on the Universities of Wisconsin Procurement web page on a regular basis until one week before the SOQ deadline. The name of the firm submitting a question will not be posted.

Procurement Contact:
Mike Morris
Interim Purchasing Services Delivery Manager
Universities of Wisconsin - UW Shared Services
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