

<b>SUBJECT: Procedure for the Design, Procurement, and Installation of Furnishings and Equipment for Major Projects</b>	<b>Effective Date:</b>	<b>Procedure Number:</b>	
	5/17/13	FS 2013 FPC0016	
	<b>Supersedes:</b>	<b>Page</b>	<b>Of</b>
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<b>Responsible Authority: Associate Vice President, Administration and Finance (Facilities and Safety)</b>			

**APPLICABILITY/ACCOUNTABILITY:**

The Director of Facilities Planning, the UCF Design Project Manager, Purchasing, Facilities and Safety Business Office, and the Architect of Record are responsible for adhering to this procedure.

**PROCEDURE STATEMENT:**

Facilities & Safety and the project’s Architect of Record will select the Furniture Dealer/Distributor utilizing the Request for Proposal process outlined below. The Architect of Record will develop the Request for Proposal (RFP), and is ultimately responsible for the design layout, the selection of furnishings and equipment (F&E), and the complete coordination of the installation of F&E for the project. The selected Furniture Dealer/Distributor will be a consultant to the Architect of Record. The purchase of F&E equipment is found in the Furnishings & Equipment Approval Procedure, FS 2013 RM0017.

**DEFINITIONS:**

Major projects: projects valued in excess of \$2,000,000

**PROCEDURE:**

1. During the Negotiating Meeting, the Project Manager will inform the Architect of Record of this procedure, and of their responsibilities within this procedure.
2. During the Design/Development phase, the Architect of Record will utilize the sample RFP format, and customize it for the project. Required components of the RFP include the attached sample format (Appendix A); the project schedule components; and the required proposal format.
3. The Architect of Record will submit the RFP draft to the Project Manager for review.

4. The Project Manager will submit the RFP to the Associate Vice President, Administration and Finance (Facilities and Safety) for approval.
5. Upon approval, the Project Manager will inform the Architect to proceed with the RFP.
6. The Architect of Record will send the RFP out to a minimum of three (3) qualified furniture vendors for competition.
7. The vendors will submit their proposals to the Architect of Record. The Architect of Record, the Project Manager, and the Client will visit the vendor showrooms to view samples and options. The Architect of Record will review the RFP proposals, and will select the Furniture Dealer/Distributor.
8. The Architect of Record, the Client, and Purchasing must select the furnishings and equipment during the Design Development and Construction Document phases. Selection is made at this time to assure that the F&E will be purchased on state contract, and that there will be no issues with the location of power and data outlets.
9. The Project Manager must involve the Facilities and Safety Business Office (FSBO), the Client, the Architect, and the Interior Designer throughout the F&E process, to assure that the F&E is purchased in accordance with Furnishings & Equipment Approval Procedure, FS 2013 RM0017. FSBO will notify Facilities and Safety departments when their start-up equipment lists and costs are needed for incorporation within the comprehensive F&E list. The lists must be completed by the end of the Design Development phase, to assure timely approval.

The format of the RFPs is as follows:

- 1) Introduction Paragraph- name of project, deadline for proposals, number of proposals due, contact information
- 2) Project Description-general description of project (size, location, space types)
- 3) Project Team-contact information for the university, Architect, Interior Designer, and Contractor
- 4) Project Schedule – design milestone dates; construction milestone dates; estimated furniture design, procurement, and installation schedule

5) Required Proposal Format –

- a. Cover Letter
- b. Statement confirming that design selection, procurement, and installation are included in the proposal
- c. Description of design service; description of installation and follow-up service; proposed personnel on the project
- d. Furniture Proposals –

Select several important spaces, such as "typical office," typical conference room," "typical classroom," etc., so that the users can suggest furniture pieces.

Each grouping should include price per piece and per room, escalated to the price of the furniture when it will be purchased.

Each group must provide a "GOOD, BETTER, BEST" option (3 per space), with associated costs so that comparisons can be made concerning quality and cost across the proposals. The university, for design purposes, must provide an overall furniture budget, which needs to provide the best quality the budget can afford.

Individual fees for selection, procurement, and installation must be included so cost comparisons can be readily determined. The university expects the selection portion to be completed without compensating the vendors.

Installation fees should be a percentage of the total value of the furniture package (not per piece) so they can be compared across proposals.

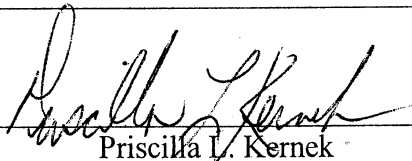
Terms and Conditions-include exclusions; additional terms and conditions.

- 6) Shortlist – The university expects the shortlist for each project to include a minimum of three (3) vendors. The Architect of Record must visit each of the final two (2) group's showrooms so that the Architect can touch and see the actual proposed furniture, to assist with selection of the vendor.

- 7) Additional items- note any specific project requirements; references to floor plan attachments and minimum quality standards must be written by Architect or Interior Designer to ensure high quality furniture, LEED goals, etc.

This process must be started during Design Development so that the furniture can be selected during Design Development and Construction Document phases; otherwise, there will be coordination issues with power and data outlets.

The project manager must involve the Facilities and Safety Business Office in the furniture and equipment procurement process beginning with the Design Development phase. The project manager will notify FSBO when it is time to develop the equipment and start-up lists. FSBO will notify the F&S departments to assemble their lists and associated quotes. FSBO will consolidate the lists and forward them on to the Associate Vice President for Administration and Finance (Facilities and Safety) for approval, and subsequent approval by the Provost. The F&S start-up list must be completed by the date of the Guaranteed Maximum Price submission, and is to be considered a priority when the complete furniture and equipment list is finally assembled.

Approved By:	Date Approved:
 Priscilla L. Kernek Associate Vice President, Administration and Finance (Facilities and Safety)	5/17/13

## Appendix A

This is a sample Request for Proposal (RFP) to be used by the Architect of Record as a basis for furniture and equipment vendor selection. Customization should be anticipated, and the final RFP must be reviewed and approved by the UCF Project Manager. *(Insert Information below)*

PROJECT NAME:

TO:

PROJECT NO:

DATE:

COPY TO:

SUBJECT: REQUEST FOR PROPOSAL

Dear *(Insert Vendor Name)*,

We would like to invite you to submit a proposal to provide furniture selection, procurement, and installation services for the *UCF Project Name*. Your proposal is due to *Architect's Firm Name* by 5 PM on *Date*. Please provide three (3) hardcopies of your full, original proposal. The project description and required proposal format follow. Please contact *Architect's Representative Name* if you have any questions regarding this RFP.

**Project Description:** *(Insert Description Here)*

Purchasing of the UCF furniture will be done through the UCF Purchasing Department and follow State Guidelines for pricing. *(Insert names and due dates below.)*

Project Team:

UCF Representative:

Architect of Record:

Interior Designer:

Contractor:

## **Project Schedule Components**

### Architectural Project Schedule:

Construction documents due:

Project pricing by Contractor due:

Construction starts:

Approximate construction duration:

### Estimated Furniture Schedule (subject to change) (*Insert Schedule below*)

Furniture team selected:

Furniture programming:

Meet with users to determine specific needs; compile a list of furniture for each room/space; and compile an estimated furniture budget for approval.

Furniture selection:

Choose specific furniture for users; and assemble selections into a presentable form for approval by the Owner/Architect.

Architectural/Interior Design coordination:

Provide furniture plans and cut sheets to the Architect, assistance with power/data outlet location coordination, and coordination with furniture finishes and fabrics, in relationship with interior finish. The Interior Designer must field verify all measurements before ordering any furnishings or equipment, to insure that everything fits as planned. If a discrepancy is found between the plans and the field measurements, the Interior Designer must notify the Architect immediately for resolution of the issue.

Furniture procurement:

Compile the proper lists of approved furniture; coordinate with the UCF Purchasing Department; and coordinate with the Architect of Record and UCF consultants. Vendors already under state contract should be given priority in the procurement process.

Furniture installation:

Near the end of construction, coordinate deliveries and installation teams with the Contractor, ensuring that the furniture is located and fits properly in the correct spaces.

Furniture follow-up support:

Provide users with continued support after the furniture is installed, in order to resolve their furniture-related problems.

**Proposal Format:**

The proposal submitted must include the following, with tabs between each section:

Cover Letter/Introduction:

A statement demonstrating an understanding of the scope and schedule of the furniture selection, procurement, and installation services. The statement should address the following:

- Confirmation that the three major service components will be provided: selection, procurement, and installation. Additional descriptions on each of these items are welcome, such as how issues are addressed and resolved, to ensure the best client satisfaction.
- Suggestions on how the furniture selection process can be enhanced (i.e., how the end users are considered in the selection process).
- Description of how your company provides procurement services and how you will work with the UCF procurement team.
- A detailed description of the installation process to be followed, and a description of coordination services.
- Suggestions on schedule adjustments, other milestones, or proposed efficiencies to the schedule process.
- Provide preliminary furniture recommendations for a typical room type layout, for different price points. Organize the information into three (3) separate

sections: Good, Better, Best. Additional graphics may be included, to clarify the room layout. Furniture recommendations for all sections are to include the approximate cost of each piece of furniture, and the estimated escalation cost of purchasing, when required, by project.

Section 1 – **GOOD**: a selection of the lowest price point furniture that you recommend for the project

Section 2 – **BETTER**: a selection of a medium price point furniture that you recommend for the project

Section 3 – **BEST**: a selection of a higher price point furniture that you recommend for the project

- The Owner will use the pricing information to understand the relative costs between the three (**GOOD**, **BETTER**, and **BEST**) options. It is understood that this cost information is preliminary and will be used for estimating purposes only. Note that we are not requesting a full estimate for each level of furniture, as final quantities may vary from the attached plans, but you are welcome to include these estimates (based on quantities shown) if you would like.

Our Interior Designer has made recommendations for the quality level of furniture in each grouping. Any deviations from these qualifications should be indicated and explained with your furniture groupings.

**Fee Section:**

Itemize fees for **selection, procurement, and installation**; include any lump sum compensation, if required.

Note that **hourly fees will not be considered**; any programming or selection fees required should be a lump sum. The **installation fee** should be a percentage of the total value of the furniture package and must be clearly stated.

**Miscellaneous:**

Additional sections can be included to illustrate your qualifications for the project. Items to be included should include: recommendation letters from clients; project information on other similar size and type of projects; and project information on successfully completed UCF projects.



**Terms and Conditions:**

Please include the T&C in an appendix section. Clearly notate any specific exclusions to your services, or if additional services will be required for any anticipated work.

**Additional Information Items:**

This RFP is being distributed to at least three (3) to a maximum of five (5) furniture distributors; the selection will be based on analysis of the submitted proposals.

The Architect of Record, who is solely responsible for this process and associated deliverables, will consult with UCF. The Architect of Record is responsible for the final decision on the furniture dealer to be used.

The fees associated with the services of the project will be administered through the vendor selected. The vendor selected will be a consultant to the Architect of Record. Furniture costs will be paid directly by UCF. The selected vendor must execute the Architect's standard master consultant contract related to the design services of the project.

The attached preliminary floor plans have been reviewed with UCF and are believed to be fairly accurate. However, some additional level of programming (we are open to recommendations) should take place between the end users of the spaces and the furniture dealers to ensure that the specific needs of the users are satisfied. A preliminary meeting should take place, between the end users and the selected furniture dealer, with the purpose of communicating the actual use of furniture in each space. At a follow-up meeting, the distributor should bring recommended cut sheets and layouts of specific furniture to the end user for approval. UCF may consider alternate layouts to the furniture plan.

The selected Furniture Distributor must provide CAD files to the Architect. CAD furniture pieces of the exact selections must be used, to ensure that the pieces fit properly, and for proper coordination of the power/data outlet locations. Our Interior Designer will have limited involvement in the furniture scope, offering only design input on the furniture selections. Furniture dealers should expect to incorporate fabrics as recommended by the Interior Designer. A workshop must be held with the Dealer and Interior Designer, to coordinate furniture finishes and fabrics with approved interior finishes.

**The cost of the furniture will be a primary consideration for selection.**

The selected Furniture Dealer must work with UCF to assemble an estimated furniture cost that is coordinated with the final furniture plans. If this estimated cost exceeds the UCF furniture budget, the furniture selection will need to be adjusted (by reducing furniture quantity or quality), at no additional cost to the Owner or the Architect of Record.

Your proposal should be structured in a way that it can be used in full, or in part, as UCF may decide to use more than one distributor.

All UCF projects are to be LEED Silver.

If you have any questions, feel free to contact me. I look forward to receiving your proposal.

Sincerely,

Architect of Record Representative