



International Facility Management Association
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Houston, Texas 77046-0104 USA

October 17, 2011

press release

RE: REQUEST FOR PROPOSAL - Real Estate Project Management Services International Facility Management Association (IFMA) - office fit-out & relocation

International Facility Management Association (IFMA), invites you to submit a proposal to provide Real Estate Project Management Services for an office relocation and fit-out/tenant improvement project at a yet to be determined location.

International Facility Management Association (IFMA)

IFMA is the world's largest and most widely recognized international association for professional facility managers, supporting more than 20,000 members in 78 countries. The association's members include 126 chapters and 16 industry councils worldwide, manage more than 37 billion square feet of property, and annually purchase more than US\$100 billion in products and services. Formed in 1980, IFMA certifies facility managers, conducts research, provides educational programs, recognizes facility management certificate programs and produces World Workplace, the world's largest facility management conference and exposition.

Project Background

In fall 2011, IFMA launched the headquarters workplace project to create a physical environment conducive to work styles and settings that drive organizational innovation supporting the achievement of strategic objectives and provides a world-class workspace for our staff and association members. Additionally, this project should provide IFMA the opportunity to explore, prioritize, and implement sustainable and sustainability initiatives such as "high performance building" design, "green lease", operations & maintenance, energy management tools and certification, facility certification/branding, etc.

IFMA's current headquarters is at 1 East Greenway Plaza in Houston, Texas. The lease of the space will expire on December 31, 2012.

This milestone presents a unique opportunity to begin the strategic planning process with a clean slate and develop a workplace strategy that supports the way our people work today while integrating the agility necessary to support how they will choose to work in the future.

IFMA has engaged DEGW as their workplace strategy consultant. DEGW will work with IFMA to determine the ideal space utilization strategy and space program as related to their organizational values, goals and functional requirements.

To date, the external project team (RE broker, Architect & Engineer (A&E), Construction Manager/General Contractor (CM/GC), etc.) has not been established.

IFMA is seeking a RE Project Management firm to manage the project on behalf of, but also in partnership with, IFMA.



Scope of Services

The scope of RE Project Management services shall include management of all project parameters, schedule, financial accounting, review of design and budget, develop and issue RFPs, coordination of client selected vendors, etc.

A detail of services that shall be used to evaluate and guide (but not limit) your response to this RFP are outlined below:

Criteria Development

- Develop a project management plan for client approval that defines how the project is executed, monitored and controlled.
- Establish and implement project reporting and accounting procedures and a communication protocol among all team members.
- Identify and document schedule and budget constraints, guidelines, and goals.
- Create a rough order of magnitude budget that identifies all cost categories and anticipated project expenditures.
- Create an initial project schedule delineating significant activities, milestones, responsibilities, and decision points.
- Identify qualified professional consultants as required, develop and issue RFPs, and manage the selection process.
- Manage the refinement and client approval process of the programming documents provided by the workplace consultant and the architectural firm.
- Develop project objectives and criteria for sustainability, in regards to the following:
 - Professional Certifications/Accreditations/Standards for consultants or vendors
 - Lease Language / Format (“Green Lease”)
 - Site Selection Criteria
 - Project Design
 - Environmental Product Declarations/Certifications
 - Construction Methodology
 - Commissioning
 - Energy Management
 - Project Certifications

Site Selection and Building Analysis

- Inspect and conduct analysis of prospective sites. Note: the prospective sites may be in multiple location, cities and/or countries.
- Participate in meetings between the client and real estate consultant.
- Provide input and assistance regarding project budget, schedule, task responsibility, and space requirements to complete the RE broker’s analysis.
- Develop a qualitative and quantitative comparison of the building systems and attributes for all short-listed buildings under consideration. Coordinate with the architectural, engineering and technology consultants as required.
- Manage the development of test-fit space plans created by the architectural consultant for each building under consideration.
- Create and issue a project budget and comparison matrix for each of the buildings under consideration. This document should provide sufficient financial due diligence to make the best economic real estate decisions relative to other primary real estate and site factors.



Lease Negotiations / Purchase Negotiations

- Define technical systems requirements for use in request for proposal to landlords.
- Develop performance schedules delineating landlord/owner and client responsibilities relating to lease and work letter or purchase agreement.
- Review lease/agreement to determine suitable language with regards to the technical aspects of the site and IFMA's sustainability objectives.
- Review and comment on landlord's/owner's work.
- Attend all meetings related to the lease/purchase negotiations.

Landlord Oversight

- Review and monitor all client and landlord obligations set forth in the lease and work letter regarding design, construction and occupancy and use reasonable efforts to ensure that such obligations are strictly adhered to.
- Attend all construction related meetings with the landlord and landlord's consultants to assure compliance with the schedule, cost, and lease arrangements.
- Monitor and manage expenditure or reimbursement of TI allowance monies.

Team Member Selection

- Develop requirements for consultants and service providers to provide all required services for the project, including, but not limited to, the following:
 - Architect / Interior Designer / Lighting Designer
 - MEP Engineers
 - Audio-Visual and Security Consultants/Vendors
 - Telephone and Technology Consultant and Cabling Installer
 - General Contractor or Construction Manager
 - Furniture Dealers
 - Moving Companies and Move Coordinators
- Incorporate sustainability design objectives and criteria in RFP for vendor services.
- Propose appropriate strategy for project contracting, whether Integrated Project Delivery, Design-Building, Design-Bid-Build, or hybrid contract.
- Determine appropriate strategy for the Construction Manager's/General Contractor's (CM/GC) construction bid and buy-out, including an assessment of stipulated sum (fixed price) versus cost-plus or guaranteed maximum sum contract arrangements.
- Develop and issue comprehensive request for proposal documents to each discipline delineating the scope of work required and parameters of the project.
- Develop a comprehensive qualitative and quantitative analysis of all proposals, received for each respective discipline, and make recommendation for contract award.
- Assist the Client with the negotiation of terms and conditions of the respective contract agreements for each service provider.
- Monitor, throughout the term of agreements, performance and contractual obligations, and aggressively control fees and change requests.

Design Development, Construction Documentation/Specifications and Management

- Establish detailed cost and quality guidelines.
- Arrange for accurate and timely flow of information from the lease to the design and engineering team to promote compliance with the client and landlord responsibilities and obligations.



- Establish detailed performance schedules for all consultants, including major milestone dates and tasks of significance.
- Regularly test budget goals and assumptions during the design and engineering process and provide value engineering and cost saving alternatives and concepts.
- Attend and direct all scheduled design and engineering meetings with the project architect and other consultants.
- Review completed plans to ensure compliance with contract obligations as well as consistency with Client directives and lease agreements.
- Coordinate and monitor the submission of documents for landlord and governmental agency review and approval.

Furniture Procurement and Disposition

- Prepare a detailed furniture budget in conjunction with the Client and the architect that supports the intent of the adopted workplace strategy. Various alternatives and options should be identified for consideration.
- Pre-qualify appropriate manufacturers and dealers, and coordinate a detailed evaluation in conjunction with the client and the architect/designer.
- Prepare and issue detailed requests for proposals and specifications.
- Negotiate the contract terms and conditions with the selected manufacturer and/or dealer, in concert with the client.
- Coordinate the disposition of existing furnishings not required as part of the relocation.

Project Budget and Invoice Management

- Create detailed preliminary, progress and final budgets to ensure accurate and timely reporting. The project budget will establish and document the economic goals and objectives for the project and shall include, but not limited to, the following categories:
 - Architectural, engineering, and consulting fees (soft costs)
 - Construction
 - Technology, Telecommunications and Security
 - Furniture
 - Audio visual and Acoustical
 - Plants, signage and artwork
 - Relocation / Move Coordination
 - Commissioning
- Create and maintain updated cash flow projections.
- Evaluate and make recommendations for appropriate action for all invoices and applications for payment of services and materials associated with the project budget.
- Publish a monthly (or as needed) budget report, which shall track the approved budget and approved or pending changes.
- Ensure that the contractor has complied with or provided the following:
 - Completion of all contractual obligations
 - Final system testing, commissioning and sign-offs
 - Sign-off on Punch List items
 - Waivers of Lien

Project Schedule Management

- Coordinate with the Client and the other team members to establish critical milestones and create a comprehensive project schedule; this schedule shall be arranged by phase



and shall delineate all major tasks, milestone activities, decision points, and levels of responsibility, including but not limited to:

- Landlord responsibilities
- Design and Construction milestones
- Lease obligations
- Telephone and data equipment procurement and installation
- Furniture procurement and installation
- Occupancy and relocation activities
- Maintain project schedule
- Ensure the project schedule is used at all project meetings to evaluate the current state of the project, plan future activities and evaluate the progress.
- Develop detailed micro performance schedules for all major tasks and areas of coordination for each discipline and monitor the responsiveness and execution.

Project Reporting

Provide regular Construction Status Reports to ensure all stakeholders involved with schedule, budget and quality compliance receive timely and accurate information. Additionally, a weekly project report/dashboard is prepared to quickly note the status of key and critical path activities.

- The weekly report/dashboard is a one-page summary of the following information:
 - Open / Critical issues
 - Approved budget amount
 - Base contract amount
 - Approved contract change orders
 - Invoices approved to date
 - Pending change orders
 - Projected costs to complete
 - Budget variance
- PM shall develop and propose the format of the project reporting document and issue draft to IFMA for review and approval within one week of PM contract award.
- Monitor and report on the project objectives and criteria for sustainability, in regards to the following:
 - Professional Certifications/Accreditations/Standards for consultants or vendors
 - Lease Language / Format (“Green Lease”)
 - Site Selection Criteria
 - Project Design
 - Environmental Product Declarations/Certifications
 - Construction Methodology
 - Commissioning
 - Energy Management
 - Project Certifications

Construction Administration

- Control project costs and review and approve payment applications and change requests as a condition of acceptance throughout the course of construction.
- Observe work in progress to evaluate quality and monitor performance and appropriate coordination between the design & engineering consultants and general contractor/construction manager (GC/CM).



- Conduct regularly scheduled weekly construction progress meetings.
- Coordinate the participation of vendors and suppliers for the installation of cabling, equipment, and furnishings within the project schedule and monitor coordination, as appropriate, with the GC/CM to ensure site readiness.
- Monitor the GC/CM and landlord for adherence to the project schedule and document delays, disputes, and related issues to establish responsibility.

Project Administration

- Develop and issue RFPs for all vendors and consultants.
- Develop, manage, and issue a project directory with all team members and vendors, including all contact information.
- Develop and manage overall project schedule timeline.
- Conduct regularly scheduled project meetings that include all relevant project consultants. Publish detailed meeting minutes and reports that indicate status and responsibility for all phases of work.
- Attend all construction related meetings with landlord and landlord's consultants and contractors to assure compliance with schedule, cost and lease agreements.
- Aggressively work on behalf of the Client to save money and promote and maintain the established project schedule.
- Provide innovative and proactive solutions to problems that may have a negative impact on the cost of the work and or project schedule.
- Monitor and implement the adherence of all parties to their respective contractual obligations and monitor and control fees and change requests.
- Issue monthly status/progress reports and accounting summaries of all project costs and expenditures relative to the budget and client improvement allowance; in addition, the reports will reflect current schedule status, upcoming decisions, and significant outstanding issues.
- Participate with the design team and the Client in developing a corrective deficiency "punch list" at the completion of each phase of work.

Relocation Management and Project Close-out

- Develop and issue request for proposals (RFPs) for all related vendors.
- Coordinate the selection of movers and installers by pre-qualification, solicitation of bids, interviews and negotiation of contract terms.
- Compile and submit all completed paperwork/forms required by the governing municipality, approved permits, as-built documents, operating manuals, instructions, warranties, final lien waiver releases, and related project documents to ensure a timely close-out of the project.
- Coordinate the creation and resolution of corrective deficiency lists.
- Evaluate the Landlord's obligations to verify conformance to lease terms & conditions.
- Minimize exposure to penalties and unnecessary expenditures.
- Ensure that the Punch List is thorough and timely issued.
- Expedite the completion of all Punch List work.
- Obtain Certificate (s) of Occupancy on behalf of client.
- Ensure that all closeout documentation required by contract is submitted on a timely basis from contractors and professionals.
- Review and forward all final requisitions for payment to the Client, after determining that all contractual obligations have been fully met.



- Submit all project documentation to the Client in an organized format.
- Assist Client in obtaining tenant work allowances.

Project Summary Files

- Upon release of the retainage, the Project Summary File containing the following information will be forwarded to the Client in electronic format where possible:
 - Approved Budget
 - Signed Contracts
 - Permits and other paperwork/forms required by the governing municipality
 - Approved Change Orders
 - Completed Punch List documentation
 - Shop Drawings
 - As-Built Drawings
 - Printed sets in full size and half size.
 - CAD files of all drawings (AutoCAD v.2010)
 - PDF files of all drawings
 - Certificates of Insurance
 - Certificates of Capital Improvement
 - Meeting Minutes
 - Bid Package & Bid Analysis
 - Applications and Certificates for Payment
 - Waivers of Lien
 - Commissioning reports
 - Sustainability certifications (as applicable)
 - Certificate(s) of Occupancy

Proposal Requirements

Please provide all of the following information (use the outline reference numbers in your proposal):

1. Provide all relevant background Information of the firm and/or proposed team:
 - a. Provide a brief description of firm, history, in-house capabilities and areas of expertise.
 - b. Form of doing business and ownership structure, legal entities and names of principals.
 - c. Services provided and percentage of business by service.
 - d. Total staff size with a breakdown of responsibilities.
 - e. Provide names and CV (resumes) of staff assigned to this contract including examples of relevant experience. Also note the main point of contact.

Identify project team members with accreditation/credentials from at least one source of “green” professional accrediting/credentialing organization (IFMA, Green Globes, Energy Star, USGBC-LEED, ISO, etc.).

IFMA Corporate Sustaining Partners and teams with IFMA members dedicated to the project are encouraged.



2. Provide three (3) examples of relevant experience on projects of this size and scale. Provide the following information for each example:
 - a. Client name, project location, contact name and phone number.
 - b. Project description and services performed.
 - c. Rentable square feet, project schedule and project construction budget.

3. Describe your approach to implementing projects with sustainable design objectives (Green Leases, high performance buildings, certification, commissioning, etc.).

Provide a summary of three projects in which you have project managed that have implemented sustainable design, project certification (Green Globes, Energy Star, LEED, ISO 50001, etc.), and/or was associated with constructing or leasing a “high performance building”.

Although these three projects may be the same as those you identify for item two (2) above, please extrapolate on the related sustainable initiatives.

4. Describe how you organize a typical project in relation to working with a client, construction manager, landlord, designers, architects and engineering consultants... through design and construction. Describe in general your quality control methods and provide examples of your methodology and tools for managing budgets, schedule and quality of deliverables.

5. Describe the limits of your professional and general liability insurance.

6. Provide a detailed description of your proposed scope of services, if they differ from the scope outlined in this document. List all exclusions and/or additional services.

7. Describe how your firm will internally organize for this project. Provide a list of your project team members along with a description of their roles and responsibilities for this project. Provide an estimate of the time each team member will devote to the project.

8. Provide your proposed fee and basis. IFMA reserves the right to negotiate the terms of any submission and the right to reject all proposals.

9. Describe all reimbursable expenses and provide an estimated cost for all expenses associated with this project. Please indicate a proposed markup on reimbursables.

10. Provide staff hourly billing rates by discipline and title.

11. Indicate proposed project billing schedule and payment terms. Proposals shall allow for termination of services after completion of any phase as well as anticipating completion of the entire scope of work by the selected firm.

12. Provide endorsed IFMA Non-Disclosure Agreement (see attached).



Questions

All questions should be issued via e-mail. The point person for each entity/firm will be copied on all questions and responses. Questions concerning this RFP should be forwarded, via e-mail, to:

Mike Moss, COO
International Facility Management Association
mike.moss@ifma.org

RFP Submission

Please send **only** an **electronic version** of your proposal to:

Christeen Seymour, Sr. Director Finance
International Facility Management Association
christeen.seymour@ifma.org

**Note: Please submit electronic RFP submission / proposal in PDF format.
File size should be no larger than 3MB.**

Schedule for Proposals and Contract Award

Oct. 21, 2011 - 5:00pm CST - Questions from Proposers - due date
Oct. 28, 2011 - 5:00pm CST - IFMA's Response to Questions
Nov. 4, 2011 - 5:00pm CST - Proposal due date
Nov. 18, 2011 - 5:00pm CST - Contract Award date

Interviews

IFMA may or may not elect to interview the respondents following the receipt and review of your proposal. If IFMA decides to interview the proposing RE PM firms, you should assume that you have approximately 45 minutes to present your firm's capabilities and elaborate on items in your proposal. The presentation will offer IFMA insight into how your firm intends to manage the project from design development, construction drawings, bidding, construction administration, move coordination and project closeout.

The selected firm will be expected to begin working on the project immediately.
We look forward to your proposals.

Best Regards,

A handwritten signature in black ink, appearing to read 'Mike Moss'.

Mike Moss
International Facility Management Association

cc: Christeen Seymour
Marc S. Liciardello

attachments: IFMA Non-Disclosure Agreement



NONDISCLOSURE AGREEMENT AND ASSIGNMENT OF INTELLECTUAL PROPERTY

In consideration of the disclosure of confidential information of the International Facility Management Association (IFMA) or any of its affiliates, and any compensation paid by IFMA to the undersigned consultant ("Consultant"), the receipt and sufficiency of which is hereby acknowledged, Consultant and IFMA agree, as follows, with intent to be legally bound:

In this Agreement, "Intellectual Property" means all works, including literary, pictorial, graphic, sculptural, and architectural work, works of visual art, and other work that may be the subject of copyright protection; advertising and marketing ideas and concepts; information; data; formulae; designs; models; drawings and sketches; computer programs, including all written instructions therefore and documentation thereof; design specifications; flowcharts; trade secrets; and any inventions, including all processes, machines, manufactures and compositions of matter and any other invention that may be the subject of patent protection, and all patents and other statutory protection obtained or obtainable thereon.

Consultant hereby assigns to IFMA all right, title and interest in and to all Intellectual Property created by Consultant in connection with its services to IFMA, including all copyrights, and Consultant agrees that the ownership of same will vest solely in IFMA. All Intellectual Property so created by Consultant which is copyrightable, whether or not "work made for hire" under the U.S. Copyright Act of 1976, as amended, will vest solely in IFMA. As to copyrights, this assignment will be effective for the entire scope and duration of the copyrights and will specifically include all rights to derivative works. Consultant waives all rights of attribution and integrity for specific works created by Consultant as to all marketing, advertising and commercial uses thereof. Consultant agrees promptly to execute, without charge, all declarations, assignments and other documents reasonably required by IFMA to perfect IFMA's right, title and interest in and to all Intellectual Property.

Consultant agrees that this Agreement creates a confidential relationship between Consultant and IFMA, which is the basis on which Consultant will provide services. IFMA may have disclosed and may in the future disclose, commercially valuable, proprietary, confidential information, in connection with Consultant's services to IFMA. Such information is proprietary to IFMA or has been disclosed to IFMA in confidence by a third party, and contains trade secrets of IFMA or such third party. Consultant will hold such information in strictest confidence, disclosing such information to Consultant's employees and agents only on a "need-to-know" basis, and will not disclose such information to any third party, or use such information for any purpose other than to fulfill the terms of this Agreement. These secrecy obligations will not apply to information that is or becomes generally available to the public as a matter of record other than as a result of a breach of this Agreement by Consultant, or by a breach by any third person or entity to whom such information was entrusted.

Consultant will safeguard all materials, written or otherwise, which IFMA supplies to it, or which Consultant creates on IFMA's behalf, and will not copy or share such materials with any third party, without IFMA's prior written consent. Consultant will return such materials, and any copies thereof to IFMA, on completion of Consultant's services, or on IFMA's request.

In case of a breach or threatened breach of any of the foregoing provisions, Consultant agrees that damages to be suffered by IFMA will not be fully compensable in money damages alone, and accordingly, IFMA or any third party owner of the confidential information will, in addition to other available legal or equitable remedies, be entitled to an injunction against such breach or threatened breach without any requirement to post bond as a condition of such relief.

This Agreement will be binding upon Consultant, and its officers, directors, employees, partners, shareholders, agents and other representatives.

Consultant Name / Organization*:	_____	(please print)
SSN / EIN*:	_____	(please print)
Authorized Representative (signature):	_____	(please sign)
Authorized Representative (printed):	_____	(please print)
Date:	_____	(please print)
*Consultant is a (check (√) one): ___Corporation ___Partnership ___Sole Proprietorship ___Other		
*Failure to complete may result in delay/suspension of payment(s).		