

International Facility Management Association
IFMA

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Workplace Strategy Services

Request for Proposal

International Facility Management Association - IFMA

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RFP No.: WPS/2011-07-08**Workplace Strategy Services****Issuance Date:****July 8, 2011****Date Final Request for Proposals due from Qualified Providers:****August 5, 2011**

The International Facility Management Association (IFMA) has a current requirement to conduct the research necessary to facilitate the development of an integrated set of workplace planning strategies. These strategies must provide our employees with the necessary tools to support our organization and customers. An additional goal is to create a work environment that reflects the image and brand of IFMA in accordance with IFMA's Strategy Map. This Request for Proposal (hereinafter "RFP" or "solicitation") presents our requirements for these services as defined in Section 1, Statement of Work.

IFMA is an independent, not-for-profit corporation that provides association services to Facility Management Professionals worldwide.

Offerors are cautioned to read this solicitation in its entirety. This solicitation shall not be construed in any manner to create an obligation on the part of IFMA to enter into a Contract with your firm or to serve as the basis for any claim whatsoever for reimbursement of costs for efforts expended in preparing your proposal, regardless of whether or not your firm is successful in receiving a Contract as a result of this solicitation.

IFMA reserves the right, as its interests require, to accept or reject any and all proposals, to make multiple awards pursuant to this RFP, and to accept or reject any or all items of a proposal at its discretion.

The Offerors will be reviewed in a three-step process:

1. Firstly, offerors will be reviewed for their qualifications in respect to Workplace Strategy and Change Management Services. The Offeror's qualifications should be submitted as part of the Offeror's Intent to Bid. This pre-qualification review will establish which Offerors will be allowed to submit a proposal.
2. Secondly, the Offeror's proposals will be reviewed for completeness, scope, fees and alignment with IFMA's objectives.
3. Lastly, a shortlist of Qualified Offerors will be selected from the submitted proposals and be asked to provide an oral presentation of their qualifications, approach, team, etc.

For additional information, please contact IFMA, COO, at 281-974-5614 or at mike.moss@ifma.org.

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Section 1 - STATEMENT OF WORK FOR CONTRACTOR

1.1 Description of Services

The Contractor shall accomplish the objectives delineated below:

- A. Coordinate project framework and timeline with IFMA Chief Operating Officer.
- B. Develop and analyze survey data to provide a window on how our employee population works.
- C. Develop an observational study and analysis.
- D. Provide, with a comparison against industry benchmarks, design/program elements to support focus groups.
- E. Provide strategies to achieve an innovative and agile workplace consistent with IFMA's Strategy Map and forward-looking practices that will future-proof IFMA's investment.
- F. Provide data analyses and reports to identify work styles and proposed provisioning.
- G. Produce results allowing leaders to address strategic and tactical issues surrounding implementation and proposed roll-outs.
- H. Coordinate the implementation of the approved workplace strategies with the architect/designer for the project. This should include meetings in the test-fit and schematic design phases.

1.2 Schedule of Services

1.2.1 Project Management

The Contractor will coordinate a kick off meeting and visioning session respectively with the IFMA HQ Project Steering Committee the content of which will be further defined by IFMA after contract award. This meeting will be held at IFMA's Houston, Texas office and will cover vision, objectives, roles and responsibilities, timeline and key performance indicators.

- A. Create a detailed project plan mutually agreed upon by both parties, including critical path timing and milestone deliverables. The day and time for a weekly conference call shall be established for the Contractor and COO to discuss current and upcoming project deliverables and issues.
- B. Create a streamlined approach to project information management with a focus on the following:
 - **Communications**

The Contractor will prepare a change management and communications plan in consultation with the project team to include recommended actions, a schedule of events, communications needs, and responsible parties.

IFMA and the Contractor will determine the key messages needed to be communicated to the population affected by pending changes. If successful, these will address audience needs and support anticipated challenges at all levels within the organization and externally.
 - **Meetings**

The above scope will be supported by weekly or monthly meetings as appropriate to speed and phase of project. Contractor will orchestrate, participate, document and provide leadership for management meetings to promote adoption of proposed changes through a series of meetings as required.

1.2.2 Interviews

- A. The contractor will begin this effort by conducting a Visioning Session of a minimum duration of two (2) hours with the IFMA Steering Committee at IFMA's Houston, Texas office. The goal is to develop and document the strategic direction and scope of this effort which will set the tone and pace for all further deliverables. Contractor to submit in their technical proposal their direct experience, approach, key activities, tools and technologies that shall be used to facilitate the visioning session.
- B. The Contractor shall facilitate interviews with the strategic leadership team members, (7 people). The goal is to enable peer leaders to generate and circulate ideas for the growth and innovation of the organization. The focus should be high level, and primarily centered on business objectives and challenges. Topics of discussion might include: Strategy, Culture, People, Rewards, Structure, Processes, Collaboration, Change, and Success. This will provide the Contractor a foundation for defining the workplace survey and ultimately the creation of workplace standards and planning guidelines that support that strategy.
- C. Contractor will conduct interviews or meetings with selected members of IFMA's Board of Directors and/or other representatives as designated by the steering committee with the goal of uncovering trends in how work is done, and the primary needs of the employees (IFMA estimates six (6) selected interviews with each consisting of up to five (5) attendees) . The results will provide more specific information for the workplace survey and give the Contractor insight into the appropriate workspace components, as well as helping to determine the need for tools, meeting space and heads-down space. The Contractor should be evaluating results for teams that might be suited for alternate work.
- D. IFMA assumes these interviews will be in person at our IFMA offices and the duration for the six (6) interviews will be one day.

1.2.3 Survey

- A. Given the data gathered from the interviews/work sessions regarding perceptions of the workplace, the Contractor will then create a Workplace Survey. The survey will be structured in a manner to allow the Contractor and the organization to understand the following:
 - Relevant issues among the organization as a whole.
 - Collaboration capabilities
 - Information that suggests a range of tools and design principles to enhance the function and the overall quality of the work environment.
 - Finally, the Workplace Survey can provide a basis for measuring improvements to the work environment for future benchmarking/post-occupancy analysis.
- B. The Contractor will present the steering committee and COO with a report of the early findings or critical workplace issues that have arisen during this process.
- C. Upon the approval of the survey the Contractor will make the necessary preparations to roll out the survey to the organization.
- D. Contractor will provide the survey in a format that will allow for an online, inter or intranet deployment.
- E. Contractor will analyze the results of the staff survey, compare that data with the initial data gathered from the interviews & committee meetings and assemble a report of the findings.

- F. The analysis should include quantitative and qualitative benchmarks for space utilization to include but not limited to the following categories:
- Office and workstation sizes
 - Square footage per seat
 - Conferencing provisions per seat
 - Circulation factors
 - Support square footage per seat
 - Internal and External Mobility
- G. In addition the Contractor should report on any trends that may influence the workspace.

1.2.4 Design Review

The Contractor shall review relevant IFMA research on the workplace in addition to applying innovative design, best practices and methods developed by the contractor through their rigorous and repeatable performance with US based and Global clients, and as delivered solely by contractors company/employees. Document and submit examples of this work in the technical section of the contractor's submission. Contractor shall also include in the technical response recommendations including but not limited to the following:

- A. Across locations that would be considered representative of current space conditions and work flows
- B. Between Centers, wherever distinct enough to be compared
- C. In relation to our industry image at large
- D. Sustainability elements

1.2.5 Observational Analysis

- A. The Contractor will coordinate with the IFMA project implementation team to determine the appropriate methodology to perform a statistically significant Time Utilization study and observational analysis
- B. Perform the walk-through to deliver statistically significant data.
- C. Develop report, issue and utilize data in the preparation of focus groups

1.2.6 Focus Groups

- A. The Contractor will organize and lead interactive work sessions (Assume a focus group for each observation.) with employees to present survey findings, discuss workplace use, impressions, and general opinions on effectiveness of the workplace in supporting business.
- B. Contractor will incorporate as part of gap analysis but not limited to the following: work profiles, adjacency issues, and collaboration and cross team interactions.
- C. The Contractor will report to the Steering Committee on their understanding of spatial requirements, as well as the technology, equipment and furniture needs of these users.
- D. Contractor will moderate and then summarize the findings from the focus groups. Reporting will be presented to steering committee.
- E. Workplace analysis will be coordinated with the IFMA Implementation Team to assess options for improved workplace design and use, so that sustainability and new workplace alternatives

for distributed work are included as part of the demonstration and enhanced performance opportunities required in the new IFMA headquarters.

1.2.7 Workplace Research & Analysis Report

- A. Upon completion of the work outlined above, the Contractor will summarize the process, methodology, findings, conclusions and recommendations of the Workplace Research & Analysis. The report will lay foundation for further planning by providing a detailed assessment of current work patterns, work preferences and performance of all aspects of the workplace in all reaches of the portfolio, as well as recommended innovative new options for design of potential space. Six hard copies shall be provided along with an electronic copy to be used for further reproduction by IFMA as required.
- B. The Contractor will present design criteria and planning recommendations to demonstrate the culture, brand, and functional requirements that the workspace must support. Contractor will provide a program to illustrate recommended space allocations and associated tools. Presentation will be to the IFMA Board of Directors and key staff on DATE/TIME at IFMA Headquarters in Houston, TX.
- C. Based on the results derived above, provide IFMA Steering Committee with new workplace recommendations and define the associated cost of the recommendation.
- D. Review and compare the results of a previous workplace strategy evaluation performed in 2008. This historical data will be provided to Contractor by IFMA at time of award.

1.2.8 Implementation

- A. The Contractor shall coordinate the implementation of the approved workplace strategies with the architect/designer for the project. This should include meetings in the test-fit and schematic design phases with the objective of communicating the finer points of the workplace strategy to the architect/designer. Additionally, the Contractor should provide programmatic design reviews of the architect/designer's work during the early phases of design including test-fits, Schematic Design and Design Development.

Section 2 - EVALUATION CRITERIA AND PROPOSAL PREPARATION INSTRUCTIONS

This Section provides the Offeror with a description of the Evaluation Methodology, Technical Proposal Preparation Instructions, and Business Proposal Preparation Instructions. In any instance where these instructions conflict with the Statement of Work (SOW), the SOW shall take precedence.

2.1 General Instructions

It is the intent of IFMA, by providing the instructions set forth below, to solicit information that will demonstrate the ability of the Offeror to successfully complete the requirements specified in the RFP and to permit a competitive evaluation of each Offeror's proposal. These instructions are not, however, to be considered as all inclusive, and Offerors should therefore include in their proposal further discussions they believe to be necessary or useful in demonstrating their ability to perform the work.

2.2 Non-Disclosure/Intent to Bid / Pre-Qualification

Bidders are required to complete IFMA's non-disclosure agreement prior July 14, 2011. The non-disclosure agreement can be obtained through the contacts listed at the end of this paragraph.

Bidders are required to provide e-mail notification to IFMA to confirm their Intent to Bid. Along with the Offeror's Intent to Bid e-mail, Offerors shall include, as a PDF attachment, their qualifications for providing Workplace Strategy Services. The Pre-Qualification attachment should be a maximum of 7 pages (and should be formatted as follows: 1" minimum borders, enumerated pages, font shall be either 11 pt. Calibri or 10 pt. Arial, and dated). The pre-qualification review will establish which Offerors will be allowed to submit a proposal. This notification must be received by July 13, 2011, 5pm central time and be sent to: mike.moss@ifma.org and christeen.seymour@ifma.org.

Offeror's qualifications to provide Workplace Strategy Services will be reviewed based on the following criteria:

- a. Firm history and background.
- b. Areas of expertise.
- c. What is your firm's hierarchy and operational execution plan?
- d. Please define what exceptional performance means to you and provide a specific highly detailed example of what an exceptional outcome looks like.
- e. What are the fundamental principles and ethics that guide your firm?
- f. Has your firm ever operated under a different name?
- g. Are there any outstanding lawsuits against your firm?
- h. Is your firm third-party certified?
- i. What is your staffing level, by discipline?
- j. What is your staff's average level of experience and professional training?
- k. What is the average length of their tenure?
- l. How do you assign resources to a project?
- m. What are the key components of your internal decision making process?
- n. What communication mechanisms do you typically use?
- o. What are your typical billing mechanisms and terms?
- p. What professional organizations does your firm belong to?
- q. How many active fortune 500 and Global 1000 corporate accounts do you have?

- r. For which fortune 500 and Global 1000 organizations have you provided architectural design services?
- s. Provide the names of the team member(s) that will be designated for this project along with experience, background and availability to begin work.

IFMA will issue, by e-mail, letters of acceptance or rejection of the Offeror's qualifications. Those Offerors who receive letters of acceptance will be allowed to submit complete proposals for Workplace Strategy Services.

2.3 Organization of Proposals

Proposals shall be submitted electronically in .pdf form via e-mail to Christeen Seymour at christeen.seymour@ifma.org by the due date identified on page one of this RFP.

2.4 Proposal Handling

All proposal information submitted by the Offeror will be considered proprietary and held in the strictest confidence. This information will not be released nor discussed outside of the IFMA organization and will be used only for the purpose of evaluating the Offeror's proposal. No proposals will be returned.

2.5 Validity of Proposal Terms

Your proposal shall remain valid for 180 days following the closing date for proposal submission.

2.6 RFP Questions

All questions concerning this RFP shall be submitted no later than **July 21, 2011, 5pm central time** and should be e-mailed to Mike Moss, COO, at mike.moss@ifma.org.

2.7 Procurement Schedule

The following represents IFMA's procurement schedule as of the release of the RFP. The activities and the dates are subject to change at the sole discretion of IFMA.

ACTIVITY DATE

- Release of RFP July 8, 2011
- Notice of Intent to Bid July 13, 2011
- Pre-Qualification outline from Offerors July 15, 2011
- IFMA to review Qualifications and provide Offerors notice of acceptance or rejection of qualifications. It is IFMA's intent to only accept proposals from the most qualified Offerors, July 22, 2011.
- RFP Questions from qualified offerors to IFMA July 29, 2011
- IFMA provides answers to qualified offeror's questions August 5, 2011
- Proposals Due August 10, 2011
- Award on or around August 17, 2011
- Optional: Oral Presentations / Interviews from short list offerors
- Effective starting date of new contract September 14, 2011

2.8 Proposal Evaluation Methodology

In conducting the evaluation of the proposals, IFMA reserves the right to utilize all information available at the time of evaluation. IFMA may rely on information made available through reference checks, information available through commercial sources (such as Dunn and Bradstreet Reports) and information publicly available (such as articles contained in periodicals).

Proposals must be specific in order to be acceptable. General statements such as "the vast resources of our nationwide company will be used to perform the services required by the Statement of Work" are not sufficient. Any proposal failing to address all of the elements of these instructions, the Statement of Work (SOW), and this RFP may be considered non-compliant.

The major evaluation areas for this solicitation are included in Selection Criteria (2.9), as defined below, and the Business Factors, consisting of price and financial stability of the firm. IFMA will make an award based upon its overall assessment of the merits of the Offeror's proposal and which offer represents the best overall value to IFMA.

SELECTION CRITERIA

IFMA will be reviewing and selecting the Vendor based on the following criteria (this list may not be in order of importance):

- Technical Skill & Expertise
- Past Performance
- Cost
- IFMA member

2.9 Technical Proposal Preparation Instructions

The Offeror shall provide a Technical Proposal which presents plans for efficiently and effectively accomplishing all work described in the SOW. The Offeror shall address each of the questions below. Pages shall be consecutively numbered. The page limitation of 20 pages must be adhered to. Should the Offeror use tables or figures to respond to the questions, they must be clearly labeled and identified.

2.9.1 General Information / Questions

To help IFMA learn more about your company and offered services, please answer the following questions. Provide all information required and include them with bid package; incomplete or missing forms may disqualify bid. Please adhere to the page limit for each section, which is identified below the section title.

A. STATE THE LEGAL NAME & GIVE A BRIEF DESCRIPTION OF YOUR ORGANIZATION, INCLUDING:

- a) Brief History
- b) Date of Incorporation
- c) Number of Employees
- d) Corporate Address and Local Address of Project Manager

B. CORPORATE OVERVIEW AND EXPERIENCE:

What are the core competencies and capabilities that make your company best able to satisfy the requirement of the RFP, including any unique approaches or proprietary tools? What are the key features of a successful corporate employee engagement survey and action plan process?

C. MANAGEMENT OVERSIGHT AND PROJECT LEADERSHIP:

How will your company provide oversight and leadership in managing this project?

How will you work with the client to resolve problems that arise or unusual issues that develop?

D. STAFF QUALIFICATIONS:

Provide the resume of key Project Manager. State the depth of skills and experience of this individual. The resume shall, at a minimum, provide the information as shown below, in the order shown, and clearly describe the individuals' relevant experience and qualifications for the position:

- a) Name
- b) Proposed Position
- c) Education: Degree, Major, College/University/Other, Year Received
- d) Professional Designations and/or Technical Training: Type, Institution, Date, Certifications/Designations
- e) Job Assignments: Starting with the present or most recent position, list the last three (3) major job assignments including dates, titles, employer name, type of business, customers (if applicable), brief description of duties, and number of employees supervised.

Note: Resumes shall not be included in the page count.

E. PROJECT PLANNING, PARTNERSHIP, AND RESULTS:

What approach will you take in each phase of the work to plan and partner with IFMA to ensure all steps are completed? What are the metrics you use to assess progress? What Project Management tools and processes will be used for this project?

F. COMMUNICATIONS PLAN:

How will you work with IFMA to develop a communications plan that will be effective and successful in the IFMA membership organization environment?

G. QUESTIONNAIRE CONSTRUCTION:

Provide a copy of your standard survey questions.

H. DATA MANAGEMENT:

How will your firm manage data? In what format will you submit data results to IFMA?

I. BENCHMARKING AND BEST PRACTICES:

What capabilities does your firm offer for conducting historical, internal, and/or external benchmarking? Do you have a best practices data base? Can the best practices data base be mapped to a survey question or question sets? Is it customizable to questions IFMA may wish to use?

J. INTEGRATED TECHNOLOGY SUITE:

Are your technology tools integrated or internally linked for analyzing results, conducting “what-if” and comparative analyses, for generating non-standard reports and for developing action plans as well as executing and track them?

K. CHANGE MANAGEMENT:

What is approach to Change Management which you will use on this IFMA project? How does your Change Management process integrate technology, Human Resources and Corporate Real Estate?

L. TRAINING AND TECHNOLOGY:

What types of training has your company developed in support of new workplace strategies?

M. INFORMATION TECHNOLOGY (IT) AND RISK ASSESSMENT:

How does your company approach IT risk assessments? Do you have dedicated IT professionals who can discuss this topic and demonstrate that your systems are or can be configured to meet IFMA requirements?

N. EXAMPLE OF SUCCESS:

Can you give an example of a successful and agile response that your company made to an unexpected large customer request that was not in the original Statement of Work?

2.9.2 Past Performance

IFMA requests a minimum of five (5) and not more than ten (10) references. Each reference shall be within the last three (3) years. A minimum of three (3) references shall be similar in size to IFMA with a preferred reference being a not for profit. A minimum of two (2) references shall be a non-US based project. Please limit your response to 1 page per reference. Offerors shall ensure the accuracy of the reference information provided and **must verify** the client’s willingness to discuss its performance with IFMA. Failure to provide accurate or complete reference information may render the proposal incomplete and non-responsive.

Experience Summary Format:

- Client Corporate Name
- Address, Telephone Number, and Points of Contact
- Contract Award Date
- Duration of the Contract Period
- Geographical Location(s)
- Description of Services Provided
- Describe how sensitivity of data, privacy, and security are handled
- Problems Encountered/Resolutions
- Explain if project was completed on budget/delivery schedule and to customer satisfaction
- Innovations delivered:

- Improvement metrics and POE performance against metrics.

2.10 Business Proposal Preparation Instructions

2.10.1 All pricing data shall be submitted to IFMA under **separate attachment**.

2.10.2 Prices should be bid on a Time & Materials basis.

2.10.3 Complete the pricing schedule which is provided in section 2.10.5

2.10.4 Include all of the following additional information listed below, as part of the Business Proposal response:

- A. Provide a brief written description of your basis of estimate. Explain the need for certain labor types and the amount of hours for each of the work categories. Also identify the travel necessary in each of the work categories.
- B. Dun and Bradstreet: Provide D&B number, current rating and business size.
- C. Federal Tax Identification: Include your Federal Tax Identification Number and identify your state of incorporation.
- D. Acceptance of Contract Provisions: Identify any proposed changes to contract provisions and these will be evaluated.
- E. Complete and sign a copy of the Representations & Certifications

2.10.5 Pricing Schedule

The pricing schedule on the following page (EXHIBIT C – PRICING SCHEDULE) identifies the minimum activities the proposer shall provide and lead as part of the workplace strategy and change management process. For each activity a count is shown under which the proposer will reflect how many times/units it would be repeated (e.g., to cover multiple subgroups). Approximate timing is shown under the “week” column, with the assumption that activities would start immediately following project initiation. N.B.: The proposer shall not take exception to this schedule and must complete the schedule as written and directed. Failure to comply with this requirement will result in disqualification and rejection of the proposer’s submission by IFMA whose decision in this matter shall be final. Additional activities beyond those listed in the schedule below may be submitted in the same format as an addendum to the proposer’s submission and listed as “Exhibit C – PRICING SCHEDULE for Additional Activities – Addendum”.

EXHIBIT C - PRICING SCHEDULE

| On-site Research | Purpose | Activities | Count/ Unit | Week of Activity | Participants including proposer | Fee |
|---|----------------|-------------------|------------------------|-----------------------------|--|------------|
| Detailed background review | | | | | | |
| Leadership Visioning Session | | | | | | |
| Leadership Interviews | | | | | | |
| Workplace Performance Survey | | | | | | |
| Time Utilization Study | | | | | | |
| Employee Focus Groups | | | | | | |
| Findings review | | | | | | |
| Scenario Development | Purpose | Activities | Count/ Unit | Week of Activity | Participants including proposer | Fee |
| Scenario Development | | | | | | |
| Internal Scenario Review | | | | | | |
| Leadership Review | | | | | | |
| Finalize program & brief | | | | | | |
| Design Liaison | | | | | | |
| Change Management | Purpose | Activities | Count/ Unit | Week of Activity | Participants including proposer | Fee |
| Change Planning | | | | tbd | | |
| Leadership Change Management Introduction | | | | tbd | | |
| Town Hall - all staff | | | | tbd | | |
| Project Steering Committee Meeting | | | | tbd | | |
| Employee Working Group Meeting | | | | tbd | | |
| Team Protocol Sessions | | | | tbd | | |
| Onsite move week support | | | | | | |
| General Communications | | | | | | |

