



SOLICITATION INFORMATION SHEET
PROFESSIONAL SERVICES - ON-CALL PROGRAM
(Without Design)
REQUEST FOR STATEMENT OF QUALIFICATIONS

The University of Connecticut is accepting Statement of Qualifications for:

RFQ RELEASE DATE: 3/17/2026

PROGRAM NUMBER: 013.1-OC.PMO_ENERGY27

PROGRAM NAME: Energy Project Management Oversight Services

PROGRAM LOCATION(S): Storrs Campus, Regional Campuses, UConn Health Locations, Any Other University Property

PROCUREMENT AGENT: Chris Peters, chris.peters@uconn.edu, 860-486-6324

INTENT OF THIS SOLICITATION: The purpose of this Request for Qualifications (“RFQ”) is to request submissions of Statement of Qualifications from Companies that can provide as needed services such as program and project management, document control, records management, cost estimating and scheduling, construction inspection, owner's representative on assigned Projects/Programs, and other support services as needed by the University. The services requested may be for the University's main campus at Storrs regional campuses (Avery Point, Hartford School of Law, downtown Hartford, Stamford, and Waterbury), UConn Health (UCH) (Farmington, satellite locations), and any other University property.

LOCATION OF THIS SOLICITATION: Submit a Statement of Qualifications (“Proposal”) for this solicitation through the HuskyBuy Portal:

<https://bids.sciquest.com/apps/Router/PublicEvent?CustomerOrg=UConnFullSuite>.

SBE/MBE PARTICIPATION: The University of Connecticut is committed to providing a professionally inclusive environment within which small and minority businesses are encouraged to participate in the procurement experience. As such, we encourage participation by Small (SBE) businesses, Minority-Owned (MBE) businesses, Woman-Owned (WBE) businesses, and businesses owned by persons with a disability (DisBE), certified as such by the Connecticut’s Department of Administrative Services Supplier Diversity Division. For further information, visit: <https://portal.ct.gov/DAS/Services/Licensing-Certification-Permitting-and-Codes/Small-Minority-Business-Center>. To learn about the University of Connecticut’s Supplier Diversity Program, visit: <https://supplierdiversity.ubs.uconn.edu>. Additionally, the University encourages Connecticut-based businesses to participate in this public solicitation process.

CRITICAL DATES:

Pre-Proposal Conference Date and Time	3/25/2026	2:00 PM
Pre-Proposal Conference Location	<u>Microsoft Teams Meeting</u>	
Q&A (RFI) Due Date and Time	4/1/2026	2:00 PM
Proposal Due Date and Time	4/15/2026	2:00 PM

PRE-PROPOSAL CONFERENCE: During the Pre-Proposal Conference, the RFQ and Scope of Work will be discussed. The Pre-Proposal Conference is not mandatory, however, interested Proposers are strongly encouraged to attend. Please follow the link provided above to the Microsoft Teams virtual meeting.

REQUEST FOR INFORMATION QUESTIONS: All Requests for Information (“RFI”) questions are to be posted under the Q&A Board Tab in the HuskyBuy sourcing event for this Solicitation. No phone calls or RFI questions emailed directly to the Procurement Agent will be accepted.

CLARIFICATIONS, ADDENDA, and INTERPRETATIONS: Proposers shall promptly notify the University of any ambiguity, inconsistency, or error which they may discover upon examination of the contract documents.

Any and all interpretations of the RFI Responses, contract documents, and supplemental instructions, will be in the form of a clarification/addendum, and posted as part of the HuskyBuy sourcing event. Failure of a Proposer to receive such clarification/addendum or interpretation shall not release a Proposer from the obligations under its Proposal as submitted.

CONSIDERATION OF PROPOSALS: This is a Quality-Based Selection solicitation process. A Proposer shall demonstrate, to the satisfaction of the University, that it possesses the proven managerial ability, technical ability, and the integrity, necessary to perform the Scope of Work for this Program faithfully and efficiently, without conflict of interest. Proposals shall be evaluated utilizing the objective technical criteria listed within the RFQ, as well as any additional information obtained from persons or other sources identified in the Proposal. The University reserves the right to make multiple awards for this Program if it is deemed to be in its own best interest.

PROGRAM SCHEDULE/DURATION:

- The Master Agreement is planned to start: **June 1, 2026**
- Program Duration: **4 Years**

PROGRAM DESCRIPTION: The goal of the University is to give all Companies awarded an On-Call Contract a fair opportunity to participate in providing services within its designated category. The University shall have absolute discretion to issue and/or withhold Assignments that best serve the interests of the University and there is no guarantee of any dollar value or number of Assignments a Company will receive, or an obligation on the part of the University to provide a Company with Assignments.

The Assignments to be issued under the On-Call Contract may vary from studies, reviews, services for small renovation projects and minor design work to services in connection with larger infrastructure, renovations, or new building projects. Assignment values will vary depending upon the project type, scope, size and/or complexity but will not exceed \$1 million per Assignment.

The selection of a Company for an Assignment is determined on a rotational/equalization basis, taking into consideration the number and value of a Company's previous Assignments. Other criteria that may be considered in the selection process include the following:

- The size and complexity of the Assignment.
- A Company's performance on previous similar Assignments, including quality, timeliness, and cost of services.
- A Company's ability and sufficiency of staff resources to complete the Assignment in a timely manner.
- Impact the Assignment may have on other work the Company is currently performing.
- The fee proposal for the scope of services.
- Other criteria unique to a particular Assignment.

Note: On-Call Companies that repeatedly fail to timely respond to requests for services or repeatedly decline to submit responses to requests for services may, at the University's discretion, have their On-Call Contract terminated.

After the University has selected a Company for a particular Assignment, the Company will receive a Request for Services. After discussion of the scope of services and walk-through (if applicable), the Company will submit a Cost Proposal. Fee assignments will be one of the following:

- Lump Sum fixed fee for the Assignment.
- Lump Sum fixed fee by phases.
- Hourly Rate Fee up to an agreed maximum aggregate amount.

Once the terms and cost are agreed to by the University and the Company, a Purchase Order will be issued for the Assignment.

The University may also select to issue a Request for Proposal to the entire On-Call category pool. When this method is chosen, the Company with the lowest fee proposal will be selected and issued a Purchase Order, assuming the Company meets all other technical criteria.

SCOPE OF WORK: The Company should have the experience and ability to self-perform the majority of the services for this category.

Examples of the services that may be required under the Project Management Oversight Services On-Call category are listed below. Services may include, but are not limited to the following:

- Assignments for energy conservation projects such as carbon mitigation, energy and water saving improvements.
- Management, direction, administration, quality assurance, leadership, and owner representation for all phases of a project (design through construction/close-out).
- Management and oversight of all activities performed by contractor/subcontractor personnel.
- Analyze and make recommendations to the University on any issue which has the potential to impact project cost and/or schedule.
- Coordinate with various University Departments and the necessary testing agencies, code officials, consultants, and vendors, to complete the project.
- Working with Utility companies to assist in the implementation of incentive programs and supporting various UConn departments
- Prepare daily project inspection reports, provide weekly/monthly project status reports, review

- pay applications and change orders for accuracy and cost.
- Develop and maintain project schedules, ensure proper time management and progress of the project, and monitor project budget.
- Analyzing energy data, completing energy calculations and savings including Rate of Investment (ROI) and greenhouse gas emissions data, reviewing cost estimates and supporting Federal, State and utility incentives and/or grants that are available.
- Develop cost estimates and planning documents upon request for the University.
- Develop scopes of work as required for design services or construction services of a project.

Types of projects companies can expect to see in this program include but are not limited to:

- Upgrade of interior/exterior lighting retrofit to LED technology and controls
- Optimization of occupancy controls strategies
- Retro commissioning
- Continuous commissioning and fault detection implementation
- HVAC and control systems improvements
- Steam trap repairs and monitoring
- Solar installation
- Fuel cell
- Battery storage system tasks.

QUALIFICATIONS OF PROPOSER: All Proposers must provide information/documentation with their submission that demonstrates the following:

- **NARRATIVE OF PROJECT APPROACH:** Prepare a Narrative that demonstrates your Company's understanding of the Scope of Work for this Program. Concisely present an approach that includes the following:
 - a. Technical Approach: Describe your Company's approach, which demonstrates your understanding of the needs of this On-Call Program, including your Company's process for completing a Scope of Work within a proposed schedule.
 - b. Specialty Services: Describe any expertise or specialty services related to the Scope of Work for this Program that your Company has experience with.
 - c. Quality Assurance/Quality Control: Describe your Company's process and procedure for managing and assuring the quality of its documents.
- **PREVIOUS RELEVANT EXPERIENCE:** Describe the overall qualifications of the Proposer, including background in this field and the services that it provides. Utilize the *Previous Relevant Experience Form, ProfServ (On-Call without Design)-RFQ* provided with this RFQ.
 - a. Provide **three (3) examples** of Assignments that are in progress (at least 75% of the Assignment complete) or completed, comparable in scope and similar environment to this Program, with an emphasis on *energy conservation for academic facilities (preferably higher education), healthcare facilities, collegiate student housing, and research facilities*, completed within the past **ten (10) years**.
 - b. A detailed description of the PMO's role in the example and how it relates to the Scope of Work outlined in the RFQ shall be included.
 - c. *Companies are encouraged to submit a variety of examples that demonstrate their experience with the types of buildings/services listed in the Program Scope of Work.*
 - d. Examples with any information on the Form stated as "confidential" may not be considered.
 - e. On-Call Programs cannot be submitted as an example, however an individual project performed under an On-Call Program may be submitted as one of the Company's examples.

- **PROPOSED TEAM QUALIFICATIONS:** The Proposer must demonstrate the ability to staff the Program with high quality, experienced personnel. Describe the qualifications and responsibilities of the key personnel who may be assigned to the Program including their experience on similar assignments and their specific responsibilities for the proposed Program. Utilize the *Resume for Proposed Key Personnel, ProfServ (On-Call without Design)-RFQ* provided with this RFQ.
 - a. It is recommended that the Proposer provide Resumes for the following positions: **Principal, Project Manager, and Field Engineer**. Only provide Resumes for the key personnel who may be assigned to the Program; do not include Resumes for personnel not assigned to the team.
- **LICENSES AND CERTIFICATIONS: (To be collected after a Letter of Intent is issued)**
 - It is preferred (not required) that the Company has either a Professional Architectural Firm License or a Professional Engineering Company License:
 - o Architecture Firm – If your Company is a corporation, provide a copy of your Company’s Certificate of Authorization from the Connecticut Architectural Licensing Board (as per Connecticut General Statutes §20-298a and §20-298b). This certificate must remain effective for so long as the design professional is under contract to provide professional services for this Program.
 - o Professional Engineering Company – Provide a copy of the Company’s License (as per Connecticut General Statutes Section 20-306a and 20-306b). This License must remain effective for so long as the design professional is under contract to provide professional services for this Program.
 - It is preferred (not required) that at least one proposed Program team member have a current Connecticut Architect license or current Connecticut Professional Engineering (PE) License.
 - It is preferred (not required) that at least one proposed Program team member have a current Professional LEED AP Accreditation.

The proposer must be able to self-perform a majority of the work. Please do not submit any sub-consultant information. This information will only be needed at the time of assignment.

MISCELLANEOUS REQUIRED DOCUMENTS: The Proposal shall include the following documents:

1. **SEEC Form 10:** Review the *SEEC Form 10: Notice to Executive Branch State Contractors and Prospective State Contractors of Campaign Contribution and Solicitation Limitations* (acknowledgment of receipt of the explanation of prohibitions) and upload the executed Form where applicable. The Form can be found at: https://seec.ct.gov/Portal/data/forms/ContrForms/seec_form_10_final.pdf.
2. **Hourly Rate Form:** Provide All Inclusive Hourly Rates for the key project team personnel. The hourly rates may be used to establish compensation for each assigned Project under the time compensation method.
3. **Supplier Diversity Certificate:** If certified, provide your Company’s current Supplier Diversity Certificate issued by the Connecticut Department of Administrative Services.

CONTRACT: A draft of the contract has been provided with the solicitation documents. The University reserves the right to modify the contract or waive any informality as it deems to be in the best interest of the University. By submitting a Proposal, your Company accepts the contract and any modifications that the University deems necessary to it without exception. Proposers will be notified of any modifications

to the contract made by the University. Any exceptions to the contract submitted by the Proposer will not be considered.

End of Solicitation Information Sheet