

ATTACHMENT A
SOLICITATION NO. 0900000430 REBID

This Solicitation is a Contract Document and is a request for proposal in connection with the Contract awarded by the Office of Management and Enterprise Services as more particularly described below. Any defined term used herein but not defined herein shall have the meaning ascribed in the General Terms or other Contract Document.

The State of Oklahoma is requesting a proposal for a real estate consulting engagement to develop a strategic real estate plan that addresses and incorporates the State's real estate strategies in response to COVID 19.

1. Contract Term

The Contract term, which begins on the effective date of the Contract, will end on December 31, 2020, or whenever the project is completed, if before December 31, 2020.

2. Specifications

Introduction: The State of Oklahoma is requesting a proposal for a real estate consulting engagement that will establish a strategic real estate plan. The plan will build on the State's response to COVID 19 related to real estate and further assist the State in addressing the short- and medium-term needs of programs and agencies in responding to COVID 19. Historically, the State's real estate plans and decisions have primarily been agency-centric; with many agencies determining their location, workplace design, and maintenance (daily, short- and long-term). This has resulted in a large number of agency locations (leased and owned) with dispersion across a vast geographical area (primarily Oklahoma City and Tulsa). In addition, some facilities are behind on proper maintenance and are not designed to suit a modern workforce.

Objectives: Develop a short- and medium-term comprehensive strategic real estate plan. The plan should include goals, objectives, scope of analysis and recommendations, detailed strategies and implementation plans, cost benefit analysis and impediments and success factors to consider in the implementation of the plan.

Deliverables will include:

- Kickoff Meeting to achieve alignment on:
 - Key points of contact,
 - Goals and objectives to be achieved,
 - Methodology,

- State's expectations of the time and level of involvement of state personnel during the project,
- Scheduling of key meetings and deliverables,
- Discussion of initial data requests, and
- Access to state resources.
- Weekly project check-ins will include:
 - Updated Gantt charts (or other project tracking reports/tools),
 - Team progress report against previously identified project plan,
 - Critical action items,
 - Ongoing findings,
 - Discussion of project risks and issues, and
 - Identification of areas requiring the attention or assistance of the points of contact.
- Two mid-project Steering Committee Meetings will include:
 - Presence of consulting firm senior resources,
 - Summary findings,
 - Team progress report against previously identified project plan,
 - Discussion of project risks and issues,
 - Identification of areas requiring the attention or assistance of the points of contact, and
 - Alignment on next steps.
- Quick win recommendations (presented in weekly updates as discovered)
- Comprehensive final project report that includes:
 - Recommendations that include:
 - Goals, objectives and strategies of the plan
 - Short-term and medium-term responses/adaptations to real estate to address COVID 19 response
 - Include safe practices for employees, visitors
 - Practices/Guidelines by functional areas such as:
 - Public areas
 - Group gathering areas
 - Group and individual work area
 - Maintenance of building systems
 - Communication plans
 - Incident response plans
 - Other issues as appropriate
 - Efficient management of the State's real estate portfolio
 - Consider the following when forming recommendations:
 - Health and safety of employees and visitors
 - Workforce trends
 - Mobile, telework, and remote work trends/plans
 - Changes in ways state services are delivered

- Workplace trends
 - Record storage
 - Consolidated demand in markets where feasible
- Development of standards that considers
 - Health and safety of employees and visitors
 - Space utilization
 - Finish standards
 - Building system standards
 - Furniture standards
- Energy and environmental standards
- Scope considerations
 - Prioritized geographic areas
 - Types of real estate (e.g., office, warehouse, medical) with prioritization
- Recommendations that include:
 - Evaluation of and recommendations for real estate management processes, such as leasing, acquisition and disposition practices
 - Considerations in lease vs. own decisions
 - Facility management practices with emphasis on safety and health in light of current pandemic
 - Facility maintenance practices
 - Construction management practices
 - Information systems used in above processes
 - Other
- Evaluation of the State's real estate inventory data base and reporting, and recommendations related to such.
- High-level cost of occupancy
 - Current costs (with reasonable breakdown)
 - Estimated future costs
 - Estimated capital expenditures
- Other recommendations to improve the real estate/occupancy outcomes of the State
- Identifiable benefits
 - Benefits – employee and visitor safety, customer satisfaction, employee satisfaction and retention
 - Numerical estimate of financial benefits
 - Direct – cost of real estate/occupancy
 - Short-term vs. long-term
 - Per sq. ft. cost vs. total cost
 - Lease vs. own
 - Other cost of occupancy
 - Technology

- Security
 - Maintenance
 - Routine and CapEx
 - Total cost of occupancy
 - Other
- Roadmap for major metropolitan areas as to:
 - Agencies/entities as best candidates to move into multi-agency locations (high/med/low)
 - Agencies/entities as best candidates to co-locate
 - (high/med/low)
 - Evaluation of owned buildings and major leased buildings as to
 - Long-term fit for State based on
 - Location
 - Fit of agencies/entities
 - Current condition
 - Probable capital expenditures in short and medium term
 - Cost of operation
 - Recommendations that match agencies/entities with facilities in an immediate to five-year time horizon
 - Move priority
 - Co-location priority
 - Proposed location
- Benchmark (provide comparisons for) State's real estate profile with states of similar size and with states/governmental entities with leading approaches to real estate and management
- Other factors to consider
 - Changing needs based on evolution of health pandemic
 - Current legal/legislative hurdles
 - Cultural/Change management guidance
 - Market condition and considerations
 - State resources needed
 - Range of cost, timing
 - Other recommendations/suggestions
- Presentation of report to Steering Committee

Additional Notes/Information

- 2019 Oklahoma Real Property Asset Report
<https://omes.ok.gov/sites/g/files/gmc316/ff/publications/2019RealPropertyAssetReport.pdf>
- Additional Property Reports available via OK.Gov.
<https://checkbook.ok.gov/dataset/2019-real-property-asset-data/resource/a83e5fce-9942-4de2-b033-3ce9a0303ea1>