

The University of Tennessee

REQUEST FOR QUALIFICATIONS:

Master Planning Services

for

UTK Research Innovation District Master Plan (25/26)

SBC No. 540/009-01-2026

May 26, 2026

RFQ COORDINATOR:

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1.0 STANDARD DOCUMENTS

1.1 INTRODUCTION

A. Purpose

As identified on the cover page, the Owner has issued this Request for Qualifications (RFQ) for the designated Project. The RFQ defines service requirements; solicits proposals; details proposal requirements; and outlines the process for evaluating proposals and selecting and contracting with a consultant (Consultant) for Master Planning. The Owner intends to contract with the highest evaluated Consultant whose proposal conforms to the RFQ.

B. Scope of Services

1. The Consultant's services shall consist of providing master planning services for the Project described in RFQ Section 2.3, Project Requirements and Documentation.
2. Work will include the Development of a comprehensive Master Plan which includes the following services:
 - a. Master Plan Goals and Objectives.
 - b. Review of Strategic Plan, Mission, and Vision.
 - c. Review of prior Master Plans, studies and other property/improvements information.
 - d. Identify Site Considerations.
 - e. Develop Land Use and Acquisition Plan.
 - f. Prepare Project Implementation Table and Cost
 - g. Develop Ongoing Capital Improvement Plan
 - h. Address all components of a Master Plan as outlined in the Scope of Services provided in Section 2.3.
 - i. Support approval process including UT Board of Trustees, Tennessee Higher Education Commission and State Building Commission.

C. Nondiscriminatory Participation

1. No person shall be excluded from participation in, be denied benefits of, be discriminated against in the admission or access to, or be discriminated against in treatment or employment in the State's contracted programs or activities on the grounds of disability, age, race, color, religion, sex, national origin, or other classification protected by federal or Tennessee State Constitutional or statutory law; nor shall they be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of contracts with the State of Tennessee or in the employment practices of the State's contractors. Accordingly, all vendors entering into contracts with the State of Tennessee shall, upon request, show proof of such nondiscrimination and shall post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.
2. Upon request the Owner will provide the Owner's designated contact to coordinate compliance with the nondiscrimination requirements of the State of Tennessee, Title VI of the Civil Rights Act of 1964, the Americans with Disabilities Act of 1990, and applicable federal regulations.

1.2 RFQ COMMUNICATIONS

A. Notice of Intent to Propose

1. Potential proposers shall submit a Request for RFQ Communications by email to the RFQ Coordinator. The notice should include the following.

Proposer's organization name
Name and title of a contact person
Contact person's telephone number and email address

2. The Owner will convey all official communications and addenda to such proposers.
3. The Request for RFQ Communications must be submitted no later than the date detailed in RFQ Section 2.1, Schedule of Events.
4. Such notice creates no obligation and is not a prerequisite for making a proposal.

B. RFQ Addenda and Cancellation

1. The Owner reserves the right to issue addenda to this RFQ in writing up to five days prior to the Proposal Deadline.
2. The Owner reserves the right, at its sole discretion, to cancel and reissue this RFQ or to cancel this RFQ in its entirety.

C. Additional Communications Processes

1. Unauthorized contact regarding this RFQ with employees or officials of the Owner or of the State of Tennessee other than the RFQ Coordinator may result in disqualification.
2. Interested parties and potential proposers must direct all communications regarding this RFQ to the RFQ Coordinator who is the Owner's official point of contact for this RFQ.
3. Notwithstanding the foregoing, for information and assistance regarding this RFQ interested parties may contact the staff of the Governor's Office of Diversity Business Enterprise.
4. The SBC Number for the Project shown on the cover must be referenced in all communications regarding the RFQ.
5. Oral communications shall be considered unofficial and non-binding with regard to this RFQ.
6. Each proposer shall assume the risk of the method of dispatching a communication or proposal to the Owner. The Owner assumes no responsibility for delays or delivery failures resulting from the method of dispatch. "Postmarking" of a communication or proposal shall not substitute for actual receipt of a communication or proposal by the Owner.
7. Only the Owner's official written responses and communications shall be considered binding with regard to this RFQ.
8. The Owner reserves the right to determine, at its sole discretion, the method of conveying official written responses and communications pursuant to this RFQ such as by letter, by email, or by website posting.

1.3 PRE-PROPOSAL CONFERENCE AND PROPOSER COMMENTS

A. Pre-Proposal Conference

1. A Pre-Proposal Conference will be held at the time, date, and location detailed in RFQ Section 2.1, Schedule of Events. Attendance is not a prerequisite for making a proposal.
 2. The purpose of the Pre-Proposal Conference is to discuss the RFQ scope of services and contract requirements. While questions will be entertained, the oral response to a question at the conference shall be considered tentative and non-binding with regard to this RFQ.
- B. Proposer Comments and Waiver of Objections
1. Each proposer shall carefully review this RFQ and all attachments for comments, questions, defects, objections, or other matters requiring clarification or correction, collectively called Comments. Comments must be made in writing and received by the RFQ Coordinator no later than the Comments Deadline detailed in the RFQ Section 2.1, Schedule of Events.
 2. A proposer's protests based on objections concerning the RFQ shall be considered waived and invalid if Comments relevant to the objections have not been brought to the attention of the RFQ Coordinator, in writing, by the Comments Deadline detailed in RFQ Section 2.1, Schedule of Events.
 3. The Owner reserves the right to determine, at its sole discretion, the appropriate and adequate responses to Comments. The Owner's official responses to Comments pursuant to this RFQ shall be issued as an addendum to this RFQ.

1.4 PROPOSAL REQUIREMENTS

- A. Proposal Deadline and Location
1. Section 2.1, Schedule of Events, details the requirements for the location and the deadline time and date for submitting a proposal. A late proposal or a proposal not submitted to the designated location will not be accepted.
 2. The proposal deadline time shall be established by the timepiece of the Owner.
- B. Proposal Contents
1. A proposal must respond to the description of Consultant scope of services, contract requirements, and proposal requirements described in this written RFQ and RFQ attachments, exhibits, or addenda.
 2. No portion of a proposal may be delivered orally.
 3. A proposal in response to this RFQ shall consist of a Qualifications Statement as described herein and RFQ Section 2.2.
 4. Each proposer must submit a digital file in a searchable PDF format. The digital file should not exceed 20 MB and should be clearly marked as follows and named

using the following format: "<Proposer Name> UTK Research Park Master Plan <SBC Number>".

Qualifications Statement

UTK Research Innovation District Master Plan

SBC No. 540/009-01-2026

Submitted By:

<<Consultant Name>>

<<Contact Person Name, Address, Telephone Number, Email>>

Proposers who intend to submit a proposal should contact the RFQ Coordinator no later than the time specified in the Schedule of Events to receive instructions on uploading submission to assigned portal.

C. Qualification Statement Requirements

1. No pricing information shall be included in the Qualification Statement. Inclusion in the Qualification Statement of a direct or implied revelation of cost information shall make the proposal non-responsive and the Owner will reject it.
2. Each proposer must use RFQ Section 2.2 to guide organization of the Qualification Statement. Each proposer shall duplicate RFQ Section 2.2 for use as the Table of Contents for the Qualification Statement by adding proposal page numbers and the proposer's name as indicated. The proposer must address all items for all sections and provide, in sequence, the required information and documentation with the associated item references.
3. The Qualification Statement must be economically prepared, with emphasis on completeness and clarity of content, legibly written, brief, and to the point in a direct response to the information requested for each item. All material must fit on standard 8 1/2" x 11" paper.
4. All pages must be numbered excluding covers.
5. The Qualification Statement should not exceed 50 pages excluding covers. Pages or sheets with print on both sides will be counted as two pages. Hyperlinks and QR Codes should not be included in any proposal. All pertinent information should be clearly and concisely documented within the 50 pages allowed.
6. All information included in a Qualification Statement shall be relevant to a specific requirement detailed in RFQ Section 2.2. All information must be incorporated into a response to a specific requirement and clearly referenced. Information not meeting these criteria will be deemed extraneous and will in no way contribute to the evaluation process.

D. Proposal Prohibitions and Right of Rejection

1. Each proposal must comply with all of the terms and requirements of this RFQ and all applicable State laws and regulations. The Owner reserves the right, at its sole discretion, to consider non-responsive and reject a proposal that does not comply with all of the terms, conditions, and performance requirements of this RFQ.
2. A proposal of alternate services (i.e., a proposal that offers services different from those requested by this RFQ) may be considered non-responsive and rejected.

3. A proposer shall not restrict the rights of the Owner or otherwise qualify a proposal. The Owner may determine such a proposal to be a non-responsive counteroffer and reject the proposal.
4. A proposer shall not submit the proposer's own contract terms and conditions in a response to this RFQ. If a proposal contains such terms and conditions, the Owner may determine, at its sole discretion, the proposal to be a non-responsive counteroffer, and the proposal may be rejected.
5. A proposer shall not submit more than one proposal. Submitting more than one proposal shall result in the disqualification of the proposer.
6. A proposer shall not submit multiple proposals in different forms. This prohibited action shall be defined as a proposer submitting one proposal as a Consultant and permitting a second proposer to submit another proposal with the first proposer offered as a sub-consultant. This restriction does not prohibit different proposers from offering the same sub-consultant as a part of their proposals, provided that the subconsultant does not also submit a proposal as a Consultant. Submitting multiple proposals in different forms may result in the disqualification of all proposers knowingly involved.
7. The Owner will reject a proposal if the proposal was not arrived at independently without collusion, consultation, communication, or agreement as to a matter relating to such prices with another proposer. Regardless of the time of detection, the Owner shall consider the foregoing prohibited actions that are detected to be grounds for proposal rejection or contract termination.
8. The Owner reserves the right, at its sole discretion, to reject any and all proposals in accordance with applicable laws and regulations.
9. The Owner will not contract with or consider a proposal from:
 - a. an individual who is, or within the past six months has been, an employee or official of the State of Tennessee;
 - b. a company, corporation, or other contracting entity in which an ownership of two percent or more is held by an individual who is, or within the past six months has been, an employee or official of the State of Tennessee (this shall not apply either to financial interests that have been placed into a "blind trust" arrangement pursuant to which the employee does not have knowledge of the retention or disposition of such interests or to the ownership of publicly traded stocks or bonds where such ownership constitutes less than two percent of the total outstanding amount of the stocks or bonds of the issuing entity);
 - c. a company, corporation, or other contracting entity which employs an individual who is, or within the past six months has been, an employee or official of the State of Tennessee in a position that would allow the direct or indirect use or disclosure of information, which was obtained through or in connection with his or her employment and not made available to the general public, for the purpose of furthering the private interest or personal profit of a person; or,
 - d. an individual, company, or other entity involved in assisting the Owner in the development, formulation, or drafting of this RFQ or its scope of services shall be considered to have been given information that would afford an unfair advantage over other proposers, and such individual, company, or other entity may not submit a proposal in response to this RFQ.

- e. for the purposes of applying the requirements herein, an individual shall be deemed an employee or official of the State of Tennessee until such time as all compensation for salary, termination pay, and annual leave has been paid.

E. Waiver of Variances

The Owner reserves the right, at its sole discretion, to waive a proposal's variances from full compliance with this RFQ. If the Owner waives minor variances in a proposal, such waiver shall not modify the RFQ requirements or excuse the proposer from full compliance with such. Notwithstanding a minor variance, the Owner may hold a proposer to strict compliance with this RFQ.

F. Proposal Withdrawal

A proposer may withdraw a submitted proposal at any time up to the Proposal Deadline time and date detailed in RFQ Section 2.1, Schedule of Events. To do so, a proposer must submit a written request, signed by a proposer's authorized representative to withdraw a proposal. After withdrawing a previously submitted proposal, a proposer may submit another proposal at any time up to the Proposal Deadline.

G. Proposal Errors and Amendments

Each proposer is liable for all proposal errors or omissions. A proposer may not alter or amend proposal documents after the Proposal Deadline time and date detailed in RFQ Section 2.1, Schedule of Events, unless such is requested in writing and approved by the Owner.

H. Proposal Preparation Costs

The Owner will not pay costs associated with the preparation, submittal, presentation, or contracting of a proposal.

I. Disclosure of Proposal Contents

1. Each proposal and all materials submitted to the Owner in response to this RFQ shall become the property of the Owner. Selection or rejection of a proposal does not affect this right. All proposal information shall be held in confidence during the evaluation process. Notwithstanding, a list of actual proposers submitting timely proposals may be available to the public, upon request, immediately after Qualification Statement are opened by the Owner.
2. By submitting a proposal, the proposer acknowledges and accepts that the full proposal contents and associated documents shall become open to public inspection in accordance with Tennessee Code Annotated (TCA), § 10-7-504(a)(7).

J. Licensure and Qualifications

1. A proposer must hold all necessary, applicable business and professional licenses as may be required for specific services. The Owner may require a proposer to submit evidence of proper licensure.
2. The proposer and its subconsultants shall not knowingly utilize the services of an illegal immigrant in the performance of the Work, and shall not knowingly utilize the services of a subconsultant or sub-subconsultant who utilizes the services of an illegal immigrant in the performance of the Work.
3. In compliance with the Iran Divestment Act proposals submitted shall not include

a consultant or subconsultant on the list created pursuant to TCA § 12-12-106.

4. In compliance with TCA § 12-4-119, Contractors currently engaged in a boycott of Israel or who intend to engage in a boycott of Israel should not bid.

K. Proposals by Joint Ventures

1. A form of joint venture business arrangement may be proposed for this Project. However, the Owner prefers that a single firm serve as the Project leader and administrative manager supported by business partners and consultants that serve under the management of that single firm. If a Proposer intends to submit a Proposal as a joint venture, then the following requirements shall apply:
 - i. For the purposes of this RFP, the Owner recognizes a joint venture as separate organizations or business entities that intend to combine professional or technical expertise and business experience, and to share contractual and Project responsibilities in performance of a contract pursuant to this RFP.
 - ii. Each joint venture participant shall meet the licensure and insurance requirements stated in the RFP.
2. A subconsultant to a Proposer is not a joint venture participant.

L. Severability

If a provision of this RFQ is declared by a court to be illegal or in conflict with a law, said decision shall not affect the validity of the remaining RFQ terms and provisions, and the rights and obligations of the Owner and proposers shall be construed and enforced as if the RFQ did not contain the particular provision held to be invalid.

M. Material Changes in Performance Capabilities Prior to Award

Material changes are defined as changes in the operations, management or performance capabilities of the proposer that may impact performance of the contract requirements. If there are material changes after the submission of the proposal, but prior to award of the contract, the proposer shall immediately notify the Owner of the details of such changes. The Owner reserves the right to disqualify the proposer for a material change.

N. Audited Statements

The Owner reserves the right to request CPA audited or reviewed financial statements prepared in accordance with generally accepted accounting principles. If the requested documents do not support the financial stability of the proposer the Owner reserves the right to reject the proposal.

1.5 CONTRACT REQUIREMENTS

A. Assignment and Subcontracting

1. The Proposer awarded a contract pursuant to this RFQ shall not transfer or assign a portion of the contract without the Owner's prior, written approval.
2. A subconsultant may only be substituted for a proposed subconsultant at the discretion of the Owner and with the Owner's prior, written approval.
3. At its sole discretion, the Owner reserves the right to refuse approval of a

subconsultant, transfer, or assignment.

4. Notwithstanding the use of subconsultants, the successful Proposer awarded a contract under this RFQ, shall be the prime consultant and shall be responsible for all work performed.

B. Right to Refuse Personnel

At its sole discretion, the Owner reserves the right to refuse personnel of the Consultant or a Subconsultant for use in the performance of a contract pursuant to this RFQ.

C. Insurance

- a. Before entering into a contract, the Owner will require the apparent successful Respondent to provide a Certificate of Insurance in accordance with RFQ Pro Forma Agreement. Failure to provide such insurance certificate is a material breach and grounds for termination of contract negotiations.

D. Contract Award

1. The RFQ Coordinator will forward the evaluation results to the responsible Owner official, who will consider the results and all pertinent information available to make a recommendation of contract award to the SBC. The Owner reserves the right to make an award recommendation without further discussion of a proposal.
2. Prior to approval of the SBC, the Owner will issue an Intent to Award Notice to identify the apparent highest evaluated proposal on the date detailed in the RFQ Section 2.1, Schedule of Events. The Intent to Award Notice shall not create rights, interests, or claims of entitlement in either the Proposer with apparent highest evaluated proposal or another Proposer.
3. The Owner will make the RFQ files available for public inspection on the date in the RFQ Section 2.1, Schedule of Events.
4. RFQ protest procedures are located in the SBC Policies and Procedures posted on the OSA's website.
5. The Owner reserves the right, at its sole discretion, to add terms and conditions or to revise pro forma contract requirements in the Owner's best interests subsequent to this RFQ process. No such terms and conditions or revision of contract requirements shall materially affect the basis of proposal evaluations or negatively impact the competitive nature of the RFQ process.
6. The Proposer with the apparent highest evaluated proposal must sign and return the contract drawn by the Owner pursuant to this RFQ within ten calendar days of receipt of the contract form provided by the Owner. If the Proposer fails to provide the signed contract within this time period, the Owner may determine the Proposer non-responsive to the terms of this RFQ and reject the proposal.
7. The RFQ process does not obligate the Owner and does not create rights, interests, or claims of entitlement in Proposers. Contract award and the Owner obligations pursuant thereto shall commence only after contract approval of all State officials as required by State laws and regulations and not prior to the Proposer's receipt of a fully signed contract.

E. Contract Payments

All contract payments shall be made in accordance with the contract's provisions for

Payment Terms and Conditions as detailed in Section B, Pro Forma Task Order Contract (MC) Between Owner and Consultant. No payment shall be made until the contract is approved as required by State laws and regulations. Under no conditions shall the Owner be liable for payment associated with the contract or responsible for work done by the Consultant, even work done in good faith and even if the Consultant is orally directed to proceed with the delivery of services, if it occurs before contract approval by the Owner as required by applicable statutes and rules of the State of Tennessee or before the contract start date or before the Consultant's receipt of a fully executed contract or after the contract end date specified by the contract.

F. Consultant Performance

The Consultant shall be responsible for the completion of all work set out in the contract. All work is subject to inspection, evaluation, and acceptance by the Owner. The Owner may employ all reasonable means to ensure that the work is progressing and being performed in compliance with the contract.

1.6 PRO FORMA TASK ORDER AGREEMENT

AGREEMENT

between

THE STATE OF TENNESSEE

The University of Tennessee

and

(Consultant Name)

SBC Project No. 540/009-01-2026

This Agreement, by and between the State of Tennessee, **University of Tennessee**, hereinafter referred to as the OWNER and **(Designer Name)**, hereinafter referred to as the CONSULTANT, is for the provision of master planning, analysis and related services, as further defined in the "SCOPE OF SERVICES", below.

The OWNER and the CONSULTANT, having agreed to the conditions outlined in Articles A through D below; hereby enter into the following Agreement:

A. SCOPE OF SERVICES: Master Planner Consultant for UT

1. The CONSULTANT shall provide such professional advice and assistance as the State may request regarding the development of a Master Plan which may include work associated with strategic planning, visioning, and mission as related to the development goals which are pertinent to the Master Plan, identification of security and safety needs, projections associated with FTE enrollment, evaluation of previous master plans, greenspace review, land use acquisition updates, circulation and transportation evaluation, campus infrastructure assessment, renewal, reprogramming, and asset maintenance planning, and space needs utilization and affinity program alignment, produce master plan graphics and maps, conduct initial information gathering including as needed for each assignment, cost estimating for construction of infrastructure, roads, site improvements, proposed renovations and new construction along with possible phases plans for priority planning.
2. Any work to be done by the CONSULTANT shall be approved in writing by the OWNER prior to the start of the work. Each OWNER approved scope of work ("Service") and not to exceed price shall be set forth in writing by the Head of the State Procurement Agency (SPA) or their delegated appointee and referred to herein as a "Task Order". For the purposes of this Agreement, the CONSULTANT's Principal is **(Principal name and title)** and the Head of the SPA is Austin Oakes, Executive Director of Capital Projects.

B. PAYMENT TERMS AND CONDITIONS:

1. For the work performed under this Agreement, as defined in Section A, the CONSULTANT shall be compensated based upon the not to exceed amount set forth in the Task Order. This amount shall be the maximum amount for the work performed and the total compensation due the CONSULTANT for the Service and all of the CONSULTANT's obligations under such Task Order regardless of the difficulty, hours worked, or materials or equipment required. The Task Order price includes, but is not limited to, all applicable taxes, fees, site visitation and investigation, analysis, planning work, cost estimating, and overheads, profit, and all other direct and indirect costs incurred or to be incurred, by the CONSULTANT, except as noted in this Task Order.
2. The CONSULTANT shall furnish a **monthly** summary sheet of all Task Orders under this Agreement, identifying each project expenditure, and the total expenditures to date for the Services performed under this Agreement. The CONSULTANT's compensation for services is based on a multiple of Direct Personnel Expense (DPE), determined as follows

MASTER PLAN RFQ STANDARD DOCUMENTS

3. Time for all individuals providing services under this Agreement shall be billed at the individual's typical or standard rate, in dollars per hour, calculated as set forth below and not to exceed the hourly rate set forth in the Task Order.
 - a. The typical or standard hourly rate for any employees (not principals or owners) of CONSULTANT shall not exceed a multiple of two and forty-five one hundredths (2.45) times the individual's DPE. The term "Direct Personnel Expense" means the actual cost of the individual to the company, which may not exceed one hundred thirty nine percent (139%) of the individual's base salary. "Direct Personnel Expense" includes the cost of the individual's base salary and of mandatory and customary benefits such as statutory employee benefits, insurance, sick leave, holidays and vacations, pensions, and similar benefits.
 - b. The typical or standard hourly rate for any principals and owners of CONSULTANT shall not exceed the greater of (A) a multiple of two and forty-five one hundredths (2.45) times the individual's DPE or (B) the average of the highest typical or standard hourly rate charged by an employee under the employ of said principal or owner for services provided under this Agreement.
4. Invoices to the CONSULTANT for surveys, tests, reports or other outside professional services for work authorized under this Agreement, shall be paid to the CONSULTANT with a fee, where the total payment does not to exceed one and twenty-one hundredths (1.20) times the amount invoiced to the CONSULTANT.
5. The OWNER shall reimburse the CONSULTANT the actual verified cost of reproduction of drawings and specifications, computer services, renderings and models, and special supplies authorized by the STATE.
6. The CONSULTANT shall not be reimbursed for any traveling or living expenses in connection with this Agreement, unless approved in writing in advance by the OWNER. If approved, compensation to the CONSULTANT for travel, meals, and/or lodging shall be in the amount of actual costs, subject to maximum amounts and limitations specified in the "University of Tennessee Travel Regulations," as they are amended from time to time.
7. Intentionally deleted.
8. The CONSULTANT shall submit all invoices, in a form acceptable to the OWNER with all of the necessary supporting documentation, prior to any reimbursement of allowable costs. Such invoices will be submitted monthly and shall include any reimbursement for travel expenses as defined under Paragraph 6 of this Section.
9. The Payment of an invoice by the OWNER shall not prejudice the OWNER's right to object to or to question any invoice or matter in relation thereto. Such payment by the OWNER shall neither be construed as acceptance of any part of the work or service provided nor as an approval of any of the costs invoiced therein. CONSULTANT's invoice shall be subject to reduction for amounts included in any invoice or payment theretofore made which are determined by the OWNER, on the basis of audits conducted in accordance with the terms of this Agreement, not to constitute allowable costs. Any payment shall be reduced for over-payments or increased for under-payments on subsequent invoices.
10. In no event shall the maximum liability of the OWNER under this Agreement exceed _____ **No/100th Dollars (\$XXXXX.00).**

C. TERM:

1. Term. This Agreement shall be effective for the period commencing on _____, 2026 and ending on _____, 2035. The CONSULTANT hereby acknowledges and affirms that the STATE shall have no obligation for Services rendered by the CONSULTANT which were not performed within this specified Agreement period.

2. Intentionally Deleted.
3. In Process Work Term Extension. This Agreement shall be automatically extended for a period beginning at the end of the term for the purpose of completing all Task Order activities associated with any authorized work initiated during the term of this Agreement.

D. STANDARD TERMS AND CONDITIONS:

1. The OWNER is not bound by this Agreement until it is approved by the appropriate Owner officials as indicated on the signature page of this Agreement.
2. This Agreement may be modified only by a written amendment which has been executed and approved by the appropriate parties as indicated on the signature page of this Agreement, upon submission of a thirty (30) day written notice.
3. The OWNER may terminate this Agreement by giving the CONSULTANT at least thirty (30) days written notice before the effective termination date. The CONSULTANT shall be entitled to receive compensation for the Services in an amount which the State determines to be equitable compensation for any work which has been completed prior to the date of termination.
4. If the CONSULTANT fails to properly perform its obligations under this Agreement or violates any terms of this Agreement, the OWNER shall have the right to immediately terminate this Agreement and withhold payments in excess of fair compensation for completed services. The CONSULTANT shall not be relieved of liability to the OWNER for damages sustained by virtue of any breach of this Agreement by the CONSULTANT.
5. The CONSULTANT shall not assign this Agreement or enter into a sub-Agreement for any of the services performed under this Agreement without obtaining the prior written approval of the OWNER. If such sub-Agreements are approved by the OWNER, they shall contain, at a minimum, Paragraphs D.6 and D.8 of this Agreement.
6. The CONSULTANT warrants that no part amounts under this Agreement shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation or gifts in exchange for acting as an officer, agent, employee, sub-contractor, or consultant to the CONSULTANT in connection with any work contemplated or performed relative to this Agreement.
7. The CONSULTANT shall maintain documentation for all charges against the OWNER under this Agreement. The books, records, and documents of the CONSULTANT, insofar as they relate this Agreement, shall be maintained for a period of five (5) years from the date of the final payment and shall be subject to audit at any reasonable time and upon reasonable notice by the State agency or the Comptroller of the Treasury, or their duly appointed representatives. The records shall be maintained in accordance with generally accepted accounting principles.
8. No person on the grounds of handicap, race, color, religion, sex, or national origin will be excluded from participation in, or be denied benefits of, or be otherwise subjected to discrimination in the performance of this Agreement, or in the employment practices of the CONSULTANT. The CONSULTANT shall, upon request, show proof of such non-discrimination, and shall post in conspicuous places, available to all employees and applicants, notices on non-discrimination.
9. Prohibition of Illegal Immigrants
 - a. The requirements of Public Acts of 2006, Chapter Number 878, of the State of Tennessee, addressing the use of illegal immigrants in the performance of any Agreement to supply goods or services to the State of Tennessee, shall be a material provision of this Agreement, a breach of which shall be grounds for monetary and other penalties, including termination of this Agreement.
 - b. The Consultant hereby attests, certifies, warrants, and assures that the Consultant shall not knowingly utilize the services of an illegal immigrant in the performance of this Agreement and

shall not knowingly utilize the services of any sub-contractor or consultant who will utilize the services of any illegal immigrant in the performance of this Agreement. The Consultant shall affirm this attestation, in writing, by his signature on this Agreement.

- c. The Consultant understands and agrees that failure to comply with this section will be subject to the sanctions of Public Chapter 878 of 2006 for acts or omissions occurring after its effective date. This law provides for the prohibition of a Consultant from any sub-Agreement with, or submitting an offer, proposal, or bid to Agreement with the State of Tennessee to supply goods or services for a period of one year after a Consultant is discovered to have knowingly used the services of illegal immigrants during the performance of this Agreement.
 - d. For purposes of this Agreement, "illegal immigrant" shall be defined as any person who is not either a United States citizen, a lawful permanent resident, or a person whose physical presence in the United States is authorized or allowed by the Department of Homeland Security and who, under Federal immigration laws and/or regulations, is authorized to be employed in the U.S. or is otherwise authorized to provide services under the Agreement.
10. Pursuant to Tenn. Code Ann. § 12-4-119, Contractor certifies that it is not currently engaged in, and will not for the duration of the Contract, engage in a boycott of Israel, as defined by Tenn. Code Ann. § 12-4-119(a)(1).
 11. Iran Divestment Act. The CONSULTANT certifies, under penalty of perjury, that to the best of its knowledge and belief the CONSULTANT is not on the list created pursuant to Tenn. Code Ann. § 12-12-106. The Consultant further certifies that it shall not utilize any subconsultant that is on the list created pursuant to Tenn. Code Ann. § 12-12-106
 12. The CONSULTANT shall maintain insurance coverage with the limits set forth below. CONSULTANT's certificates of insurance, in a form acceptable to the OWNER, shall be provided to the OWNER before the date of this Agreement and thereafter upon written request. The certificate of insurance required by this paragraph shall contain a provision requiring notice of cancellation to the OWNER.
 - a. Commercial General Liability

Each Occurrence	\$1,000,000
Aggregate	\$1,000,000
 - b. Commercial Automobile Liability

Any Auto – Each Accident, Combined Single Limit	\$1,000,000
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 - c. Workers' Compensation as required by statute, including employer's liability with limits of:

Each Accident	\$ 100,000
Disease, each employee	\$ 100,000
Disease, policy limits	\$ 500,000
 - d. Professional Liability Insurance

Each Claim	\$1,000,000
Annual Aggregate	\$1,000,000
 13. The CONSULTANT agrees to pay all taxes incurred in performance of this Agreement.
 14. The STATE shall have no liability except as specifically provided in this Agreement.
 15. The CONSULTANT shall comply with all applicable Federal and State laws and regulations in the performance of this Agreement.
 16. This Agreement shall be governed by laws of the State of Tennessee.

This Agreement is entered into on this the _____ day of _____ 2026.

MASTER PLAN RFQ STANDARD DOCUMENTS

Consultant:

_____ Signature	_____ Name	_____ Date
_____ Title		

The University of Tennessee:

_____ Austin Oakes Associate Vice President, Department of Capital Projects	_____ Date
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Approved as to Form and Legality:

_____ C. Ryan Stinnett General Counsel	_____ Date
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The State:

_____ Ann McGauran State Architect	_____ Date
--	---------------

Project Name
SBC No. 540/009-01-2026

_____ Project Name	_____ Responsible Account
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1.7 EVALUATION GUIDE

A. Scoring

The evaluation process is designed to award the Proposer with the highest total score which is derived from the highest total points of the Qualification Statement provided in Section 2.2, Qualification Statement.

B. Process

1. After the proposal deadline provided in RFQ Section 2.1, Schedule of Events, the Owner will open and review each Qualification Statement for a “Pass” or “Fail” evaluation based on compliance with each of the Mandatory Requirements of Section 2.2, Qualification Statement, and the following proposal format and content requirements.
 - a. Received on or before the proposal deadline.
 - b. Formatted as required and does not exceed size or page number limits.
 - c. Contains no bid amount information.
 - d. Proposer did not submit alternate proposals.
 - e. Proposer did not submit multiple proposals in a different form.
 - f. Does not contain restrictions of the rights of the Owner or other qualification of the proposal.
2. If the Owner determines that a proposal may have failed to meet one or more of the “Pass or Fail” criteria or the proposal format and content requirements, the Evaluation Team, described below, will review that proposal and make its own determination, documented in writing, of whether (1) the proposal meets requirements for further evaluation or (2) the Owner will request clarifications or corrections to enable further evaluation or (3) the Owner will determine the proposal non-responsive to the RFQ and reject it.
3. An Evaluation Team made up of three or more employees of the State of Tennessee will evaluate responsive proposals. The Evaluation Team may utilize technical advisers.
4. The Owner may contact references provided by the proposer and other sources available for reference information.
5. Each Evaluation Team member will independently evaluate proposals and assign points using Section B, Qualifications and Experience, and Section C, Technical Approach, in RFQ Section 2.2, Qualifications Statement.
6. The Owner reserves the right, at its sole discretion, to request proposer clarification of a Technical Proposal or to conduct clarification discussions with proposers. Such discussions shall be limited to specific sections of the proposal identified by the Owner. The subject proposer shall put the resulting clarification in writing as may be required by the Owner.
7. The Owner reserves the right to receive an oral presentation from a proposer. Oral presentation topics and the number of firms presenting are at the sole discretion of the Owner.
8. Using the scores from the Evaluation Team, the Owner will develop Qualification

MASTER PLAN RFQ STANDARD DOCUMENTS

Statement Scores. For each proposer the median score of all evaluators' scores is determined for both Qualification Statement Sections B and C. The two median scores for each proposer are added to determine the proposer's total Qualification Statement Score.

9. After Qualification Statement Proposal evaluations are completed the Owner will advise proposers of evaluation results.
10. The evaluation team of the Owner will then negotiate a contract with the best qualified Proposer for services at compensation which the evaluation team and Owner determines to be fair and reasonable.
11. Should the evaluation team and Owner be unable to negotiate a satisfactory contract with the firm considered to best qualified, at a price determined to be fair and reasonable, negotiations will continue with other qualified firms until an agreement is reached.

END

2.0 PROJECT SPECIFIC DOCUMENTS

2.1 SCHEDULE OF EVENTS

The following table provides the Owner’s proposed Schedule of Events. The Owner reserves the right, at its sole discretion, to change this schedule. The Owner will communicate a change to the Schedule of Events to entities from whom the Owner has received a Notice of Intent to Propose.

EVENT	DATE	TIME at LOCATION
1. Owner Issues RFQ	May 26, 2026	
2. Project Review Conference Conference will be held via Zoom and in person with details below. If attending in person, please RSVP by June 9 th , by 12:00 pm (Noon) ET.	June 10, 2026	2:00 pm ET
3. Site Visit (optional)	June 10, 2026	2:30 pm ET
4. Notice of Intent to Propose Deadline Proposers who provide a notice of intention to submit will receive instructions on uploading submissions to the assigned portal.	June 17, 2026	
5. Comments Deadline	June 18, 2026	
6. Owner Responds to Comments	June 23, 2026	
7. Qualification Statement Deadline Proposals must be submitted to the Owner no later than the date and time shown, at the location below.	June 30, 2026	12:00 pm ET
8. Target Date for Notification of Proposers for Oral Presentations	07/17/2026	
9. Target Date for Oral Presentations	07/30/2026	
10. Owner Advises Proposers of Evaluation Results and Procurement File Opened for Public Inspection	08/04/2026	
11. Cost Proposal Due	08/20/2026	

MASTER PLAN RFQ PROJECT SPECIFIC DOCUMENTS – SCHEDULE OF EVENTS

12. Request State Building Commission Approval to Award	09/10/2026	
13. Anticipated Notice Proceed Date	09/30/2026	
14. Master Plan Complete	July 2027	
15. UTK Campus Advisory Board	September 2027	
16. University of Tennessee Board of Trustees Meeting	November 2027	
17. Tennessee Higher Education Commission Meeting	Fall Meeting – November 2027	
18. State Building Commission	December 2027	

Project Review Conference Location and Instructions:

University of Tennessee Knoxville
Institute for Advanced Materials & Manufacturing
Conference Room 300
2641 Osprey Vista Way
Knoxville, TN 37920

Held via Zoom and in person – Zoom meeting invitation will be sent to firms requesting information from RFQ Coordinator by June 9, 2026, by 12:00 pm (Noon) ET. If attending in person, please RSVP as such.

Site Visit Instructions:

The Site Visit will begin at the Institute for Advanced Materials & Manufacturing following the Project Review Conference. If you plan to join the Site Visit, please RSVP.

END

2.2 QUALIFICATIONS STATEMENT

PROPOSER NAME:	
QUALIFICATIONS STATEMENT SECTION A: MANDATORY REQUIREMENTS	Submission Page Number (By Proposer)
Owner Evaluation for Each Requirement: Pass or Fail	
A.1 Provide a completed Certification Statement, in the format provided herein.	
A.2 Describe Proposer’s form of business (e.g., corporation, partnership, limited liability company) and the U.S. state in which it is established.	
A.3 Provide a statement of whether there have been mergers, acquisitions, or sales of Proposer within the last five years, and if so, an explanation providing relevant details.	
A.4 Provide a statement that discloses pending litigation against Proposer. The Owner reserves the right to request an opinion of Proposer’s counsel as to whether pending litigation will impair performance in a contract under this RFQ.	
A.5 Provide a statement declaring whether, in the last ten years, the Proposer has filed, or had filed against it, bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors, and if so, an explanation providing relevant details.	
A.6 Identify Proposer’s primary contact person for the Owner including mailing address, telephone number, and email address.	
A.7 Provide a statement declaring Proposer does not have a prohibition for proposing as stated in RFQ Section 1.4.D.9 and an explanation of potential conflict.	
A.8 Provide a list of current projects on which the Respondent’s firm is presently committed, the time frame for each, the start and completion dates, and what services are being provided.	

CERTIFICATION STATEMENT (In response to Technical Approach Section A.1.)

Proposer Legal Entity Name: _____

Proposer Tennessee Contractor License Information:

The Proposer hereby acknowledges, attests, certifies, warrants, and assures that:

1. This Qualification Statement constitutes (a) a commitment to provide all services as defined in an Agreement executed pursuant to this Request for Qualifications (RFQ) and (b) confirmation that the Proposer shall comply with all of the provisions in this RFQ.
2. The information detailed in the Qualification Statement submitted herewith in response to the subject RFQ is truthful, accurate and complete.
3. The Qualification Statement submitted herewith in response to the subject RFQ shall remain valid for at least 60 days subsequent to the date of the cost negotiation and thereafter in accordance with a contract pursuant to the RFQ.
4. The Proposer shall not knowingly utilize the services of an illegal immigrant in the performance of an executed Agreement and shall not knowingly utilize the services of a subcontractor, sub-subcontractor, or consultant who utilizes the services of an illegal immigrant in the performance of the Work.
5. As applicable to an executed Agreement, the proposer shall comply with:
 - a. the laws of the State of Tennessee;
 - b. Title VI of the federal Civil Rights Act of 1964;
 - c. Title IX of the federal Education Amendments Act of 1972;
 - d. the Equal Employment Opportunity Act and the regulations issued thereunder by the federal government;
 - e. the Americans with Disabilities Act of 1990 and the regulations issued thereunder by the federal government;
 - f. the condition that the submitted Qualification Statement was independently arrived at, without collusion, under penalty of perjury;
 - g. the condition that no amount shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the Procurement under this RFQ; and,
 - h. the condition that in compliance with the Iran Divestment Act the Proposer is not on the list created pursuant to Tennessee Code Annotated (TCA) § 12-12-106 and shall not utilize a subcontractor on that list.
 - i. TCA § 12-4-119, Contractors currently engaged in a boycott of Israel or who intend to engage in a boycott of Israel should not bid.
6. The person who signs this certification on behalf of the Proposer is legally empowered to bind the proposer to the provisions of this RFQ and a resulting contract.
7. The Proposer shall provide proof of insurance in accordance with the requirements of the RFQ.
8. The Proposer acknowledges receipt of Addendum:

Addendum number(s) and date(s): _____

SIGNATURE: _____ **DATE:** _____

Printed Name and Title: _____

END OF CERTIFICATION STATEMENT

PROPOSER NAME:	
QUALIFICATION STATEMENT SECTION B: QUALIFICATIONS AND EXPERIENCE	Submission Page Number (By Proposer)
<p>B.1 Provide a brief statement indicating Proposer’s credentials to deliver the services required by this RFQ. Name the office location(s) providing services and number of employees in each. List your staff’s conference presentations and published journal articles that are relevant to the project scope.</p> <p>5 points</p>	
<p>B.2 Provide a listing of recently completed master plans that have been developed by your firm which are similar or have aspects related to the scope of services for this project. Include description, photographs, location, and client name. Identify the firm’s role (e.g., prime consultant, subconsultant) on the project. Provide three client references for similar projects including the person’s name and title, organization, address, phone number, email address, and project(s) completed under this person’s direction.</p> <p>15 points</p>	
<p>B.3 Provide the following work examples:</p> <ol style="list-style-type: none"> 1. Include digital PDF submissions in a separate file to the Qualification Statement for the three Comprehensive Master Plans undertaken by your firm for institutions comparable to this project and listed in the Qualification Statement B.2. These attachments will not count toward the Qualification Statement submission page limits. 2. Owner will utilize such information only for purposes of evaluation and will not reproduce or redistribute such in any manner. If proprietary agreements limit submission of a work example, then the Respondent shall provide <ol style="list-style-type: none"> a. The portions that are “public domain” or are not so limited and/or b. Supplementary written description of the work example so as to provide a proxy for the portions of the work example that are relevant to the Owner’s project.” <p>15 points</p>	

MASTER PLAN RFQ PROJECT SPECIFIC DOCUMENTS – QUALIFICATION STATEMENT

<p>B.4 Provide brief (one page or less) resumes of each key staff and Subconsultant staff who will be assigned to this project. Include background information demonstrating the individual’s capabilities and qualifications to perform assigned tasks. Identify related experience, professional registration, and years of experience.</p> <p>15 points</p>	
<p>B.5 Provide a table identifying the personnel named in B.4 assigned to projects named in B.2 and their job titles for those projects.</p> <p>10 points</p>	
<p>B.6 Provide a table identifying the estimated amount of time in hours per week that each of the key personnel identified in B.4 will be committed to this project.</p> <p>5 points</p>	
<p>Section B: 65 points</p>	

PROPOSER NAME:	
QUALIFICATION STATEMENT SECTION C: TECHNICAL APPROACH	Submission Page Number (By Proposer)
C.1 Provide a narrative outlining the methodology, approach, and philosophy your firm will utilize to accomplish the scope of work. 10 points	
C.2 Support the response to C.1 above by providing the following: <ol style="list-style-type: none"> 1. A list of tasks, deliverables, and milestone activities demonstrating the firm’s approach to this project plan development. 2. A project timeline with supporting information for each phase or major component of the scope of services and including durations and target completion dates for each. 3. An organizational description or chart illustrating roles and reporting relationships of project staff including any Subcontractor staff. 10 points	
C.3 Oral Presentation and /or Clarification of Qualification Statements: <ol style="list-style-type: none"> 1. A Respondent may be asked to give an oral presentation or live technical demonstration (in person or via acceptable communication method) to the evaluation committee concerning its submission. The evaluation committee may also require the Respondent to submit written responses to questions regarding its submission. 2. It is within the evaluation committee’s discretion whether to require a Respondent to give an oral presentation or live technical demonstration. This action should not be taken to imply acceptance or rejection of a submission. 15 points	

Section C: 35 points

Maximum Technical Approach Score: 100 points.

END OF QUALIFICATIONS STATEMENT

2.3 PROJECT NARRATIVE AND DOCUMENTATION

1.1 UTK RESEARCH INNOVATION DISTRICT BACKGROUND INFORMATION

A. Background Information

The University of Tennessee, Knoxville, along with the University of Tennessee Medical Center (UTMC), the University of Tennessee Health Science Center College of Medicine Knoxville (UTHSC COM-K), and the Cherokee Farm Development Corporation (CFDC), herein after known as the “Consortium” —is initiating a transformative planning effort to define the future of East Tennessee’s first health-focused **Innovation District**. The Peninsula includes the UT Research Park at Cherokee Farms and the campuses of UTMC, and the University of Tennessee Institute of Agriculture (UTIA) as indicated below.

UTK is the state’s flagship public research university, located in Knoxville along the Tennessee River, with the University of Tennessee Institute of Agriculture (UTIA) co-located on and adjacent to the main campus, extending the university’s physical presence through teaching, research, and statewide outreach. UTK’s mission is to advance knowledge, educate students, and serve Tennessee and the world, while UTIA fulfills the university’s land-grant mission through agricultural education, research, and Extension that supports communities across the state. UTK’s Office of Research, Innovation, and Economic Development (ORIED) advances discovery, commercialization, and partnerships that translate university research into economic and societal impact.

UTMC is a 710-bed hospital and the only academic medical center in the region. University Health System entered into a long-term lease with the university beginning in 1999 and has more than doubled in revenue, facilities, and volumes since that time. UTMC and The University of Tennessee continue to build upon decades of collaboration and partnership to create an impactful destination for academics, medicine, and research.

Cherokee Farm Development Corporation as an extension the UT Research Foundation performs specific duties related to recruiting development partners; negotiating agreements; and managing and overseeing the development, operation, and maintenance of the District. UTRF established a 501(c)(3) subsidiary called the Cherokee Farm Development Corporation (CFDC) to perform these duties.

Exhibit 1 is a Vicinity Map that provides an aerial view of the Peninsula, including the locations of Cherokee Farm Research Park, UTIA, and UTMC.

The Peninsula will complement and add value to other innovation-focused developments underway in the region, including UT’s Maplehurst Innovation District structured around computational sciences, the Oak Ridge Innovation Corridor supporting the nuclear renaissance, and the Alcoa Highway Corridor (including UT’s Plant Science Unit and the East Tennessee AgResearch site in Blount County). It is imperative that the consultant

understand the unique and complementary missions of those developments as well. See Exhibit 1 for a Vicinity Map.

This District will unite the unique assets and strengths of the Consortium to foster a collaborative, future-focused hub for health-related research and education, industry partnerships and workforce development. The effort is more than the creation of a physical plan: it is about establishing a long-term vision and shared identity that connects people, institutions, and resources.

The goals of this initiative extend beyond the Peninsula and are intended to influence a much broader region and have far-reaching effects. For example, a goal of this initiative is to create a world-class environment for medical research and treatment, particularly in the field of cancer care and precision health. By aligning university research strengths with hospital needs and ambitions, the District aims to position UTMC as a premier destination for innovative treatments that attract top-tier physicians and deliver transformative outcomes that reach far beyond East Tennessee. The Consortium is united in its shared vision for the Peninsula and seeks a partner to help transform this vision into its physical manifestation. Identifying those goals up front will help establish the right connections from the beginning. This work should lead to future connections once the District begins taking shape.

Equally important is the creation of a vibrant and welcoming environment that supports those who work and collaborate within the Peninsula. The consultant must identify the amenities and spaces that are not ancillary but essential. These amenities are part of a deliberate strategy to attract and retain the world-class talent needed to drive research and innovation for decades to come. By offering an environment where professionals can bring their families, enjoy community life, and experience a sense of belonging, the Peninsula will sustain the human capital necessary to realize its vision.

This initiative also aims to establish a unified branding and signage framework for the peninsula, creating a distinct and recognizable identity that will resonate across the state and beyond. Thoughtful branding and communication strategies will help to enable the District to become a nationally recognized destination for health, education, and discovery.

B. Vision

The Peninsula will function as a biotech ecosystem - not a traditional academic university setting - attracting university and clinical investigators and research-oriented industry and other partners. It will foster an experiential environment that encourages multi-sector collaboration, and the recruitment and retention of innovation partners. Connectivity — both physical and relational — will define the Peninsula. The new Alcoa Highway bridge and enhanced entrances will link UTMC with the UT Research Innovation District, ensuring even peripheral areas feel integrated into a cohesive ecosystem. The plan should create an environment that is connected across the Peninsula's sites and to the broader Knoxville community, avoiding the isolation of several 'research islands' and instead promoting interaction, accessibility, and shared economic growth.

C. Goals

The Consortium seeks to engage a single consulting team to develop a unified, long-term vision and master plan for the Peninsula—one that reflects the shared aspirations of its partners while aligning with each stakeholder’s strategic initiatives. The following goals define the intended outcomes of this effort and will guide all planning, engagement, and implementation activities undertaken by the selected consultant.

1. Advance Collaboration and Innovation

- Foster collaboration and innovation across institutional boundaries, ensuring the District leverages the unique strengths and missions of each partner.
- Facilitate structured conversations among Consortium stakeholders early in the process to identify opportunities for enhanced collaboration—both within the Consortium and with external partners. These discussions should inform the physical planning and programmatic direction of the Peninsula.
- Identify opportunities to optimize shared resources, facilities, and partnerships across all participating entities.
- Expand the Peninsula’s regional influence and its role within the broader place-based innovation ecosystem.

2. Create a Phased, Actionable Vision for Growth

- Develop a high-level strategic vision for long-term development that aligns with the initiatives and strategic goals of each Consortium partner.
- Establish a high-level, long-term vision for development, including phased strategies that guide physical growth and investment over the next 10–20 years.
- Develop a clear phasing plan illustrating 5, 10, and 20-year horizons that demonstrate how early investments and infrastructure can enable incremental growth and long-term success.
- Recognize the “Phase 0” baseline of projects currently advancing but not yet constructed—including the Life Sciences Building at the Arrowhead site, the new Alcoa Highway bridge connecting UTMC to the UT Research Park, new entrances for both UTMC and the UT Research Park, and CFDC Buildings 5 and 6.
- Provide preliminary cost estimates to support implementation and phasing strategies.
- Support the Consortium in creating an investment and capital planning framework that links phasing to realistic funding and implementation sequencing.

3. Support a Developer-Led, Mixed-Use District

- Emphasize that Peninsula development will be developer-led, incorporating mixed-use elements that promote a dynamic, financially viable environment.
- Promote higher density and active industry engagement at the Peninsula by leveraging its proximity to McGhee Tyson Airport and by identifying new recruitment tools for industry partners.
- Focus on addressing immediate research and clinical space needs while maintaining flexibility to accommodate future growth and partnership opportunities.
- Address the need for facilities and amenities that support international visitors, long-term stays, and conference-related uses.

4. Strengthen Identity, Branding, and Experience

- Design a cohesive branding and recognition strategy for the Peninsula, including a comprehensive signage and wayfinding package. The consultant should design templates for all required sign types and provide clear guidelines for placement and implementation.
- Support a comfortable, attractive, and connected district environment with amenities and services that enhance daily experience.
- Enhance the ability to attract and retain top-tier researchers, clinicians, and professionals by creating a vibrant, well-branded, and active district environment.
- Acknowledge the Consortium’s ongoing recruitment of Preeminent Scholars, some of whom will join the institution as early as Fall 2026 and ensure that near-term planning supports their arrival and integration.

The Project Goals outline the Consortium’s overarching ambitions and desired outcomes for the Innovation District—defining what success looks like and the impact this initiative should achieve. The Scope of Work that follows translates those goals into specific tasks and deliverables that will guide the consultant’s process. Together, these sections establish both the strategic intent and the practical framework for the effort, ensuring that the consultant’s work not only reflects the Consortium’s vision but also results in an actionable, phased plan ready for implementation.

1.2 CAMPUS MASTER PLAN SCOPE OF SERVICES

The following Scope of Work outlines the key tasks, deliverables, and collaboration expectations for the selected consultant team. The scope translates the Consortium’s goals into a structured process that leads to an actionable vision and implementation framework. The selected consultant will collaborate with the Consortium, steering committee, and stakeholders to deliver a visioning document that includes the following components:

A. Stakeholder Engagement & Collaboration

- Facilitate workshops with CFDC, UT, UTMC, and UTHSC COM-K to refine goals and objectives.
- Incorporate stakeholder feedback into the planning process.

B. Needs Assessment

- Validate and expand upon current research and clinical space requirements and identify gaps.
- Analyze opportunities for shared resources and partnerships.

C. Implementation Framework

- Provide a phased implementation and capital investment plan that includes a 'Phase 0' baseline and subsequent 3-, 5-, 10-, 15-, and 20-year phases.
 - For each phase, describe anticipated development priorities, enabling infrastructure, and probable order-of-magnitude costs.

MASTER PLAN RFQ PROJECT SPECIFIC DOCUMENTS – PROJECT NARRATIVE AND DOCUMENTATION

- Identify infrastructure and utility networking improvements and needed investment —such as electrical power distribution, roadway networks, and mobility/transportation circulation—to support each phase.
- Incorporate an investment schedule illustrating funding strategies, potential developer participation, and sequencing of capital improvements.
- Include a co-phased detailed implementation plan with descriptions, cost estimates, and metrics to track progress.
- Be prepared to work with a separately procured Development Advisory Services group who may be brought on near the 30% mark to help Consortium members strategize what to fund, when, and how—without creating conflicts of interest—ensuring the plan is actionable and attainable.

The tasks and activities described in the Scope of Work will culminate in a set of tangible, actionable deliverables. These deliverables are designed to document the consultant's findings, strategies, and recommendations, providing the Consortium with a clear, phased roadmap for implementation. By aligning the deliverables with both the Project Goals and the Scope of Work, the consultant will ensure that the resulting plan is both visionary and practical, supporting decision-making, investment, and future growth across the Peninsula.

D. Deliverables

The Consultant will produce a comprehensive visioning and implementation document that includes, at a minimum:

1. A team approach to capitalization and the initial development Phase.
2. Phasing Plan — A 3, 5, 10, and 20-year framework, including a clearly defined 'Phase 0' baseline.
3. Capital Investment and Funding Strategy — A schedule aligning physical growth with capital planning and implementation sequencing.
4. Infrastructure and Mobility Plans — Evaluations of roadway circulation, transportation, mobility, new entrances, power distribution, networking, and utilities capacity.
5. A comprehensive visioning document that includes renderings, site planning diagrams outlining both existing conditions analysis and proposed conditions/recommendations. This document will have core requirements:
 - a. Executive Summary
 - b. Goals and Objectives
 - c. Safety and Security Analysis
 - d. Circulation and Transportation Evaluation
 - e. Renewal / Asset Maintenance Plan
 - f. Utilities Capacity Assessment and Investment Recommendations
6. Branding and Recognition Strategy — Although branding may continue to develop throughout the first year of the work, provide a Wayfinding and Signage Plan with base branding and standards published in a guideline document as an early deliverable (target completion within six months).
7. Integration Plan — Show how short-term priorities align with long-term goals across all Consortium partners; include tailored deliverables for each partner.
8. Optional Experiential Deliverable — A promotional/experiential video illustrating the vision for the District. This optional scope item should be priced separately and serve both as documentation and marketing tools.

9. Achieve Anticipated Milestones and Activities in Project Execution:

- a. Data collection and on-site review by consultants and subconsultants.
- b. Kick-off meeting with Planning Committee.
- c. Periodic Planning Committee meetings.
- d. Stakeholder meeting(s) and planning charrette(s).
- e. Writing, reviewing, and editing of all aspects of report and plan.
- f. Final Campus Master Plan report and presentations. Required formal presentations will include the following.
 - i. UTK Campus Advisory Board Presentation targeted for September 2027
 - ii. The University of Tennessee System Board of Trustees with presentation targeted for November 2027.
 - iii. The Tennessee Higher Education Commission with presentation targeted for November 2027.
 - iv. The Tennessee State Building Commission with presentation targeted for December 2027.

1.3 CAMPUS MASTER PLAN TARGET SCHEDULE

The scope of services is targeted for completion within 10 months of contract execution (including approvals in I.2.G.6 above).

1.4 AVAILABLE DATA

The following data is available by contacting the RFQ Coordinator. Some data is available only by viewing it on the UTK Cherokee Farm campus.

- A. Exhibit 1 - Vicinity Map providing an aerial view of the Peninsula, including the locations of Cherokee Farm Research Park, UTIA, and UTMC.
- B. Building Inventory (2019-2020 Schedule D)
- C. THEC Space Guidelines (2013)
https://www.tn.gov/content/dam/tn/thec/bureau/fiscal_admin/capital_outlay/master-plan/THEC%20Space%20Allocation%20Guidelines%20-%20September%202013.pdf
- D. Facilities Assessment data
- E. Guidelines for work should comply with all UTK campus standards. Reference UTFS Design and Construction Guidelines at: <https://fs.utk.edu/>
- F. THEC Master Plan Guidelines

END

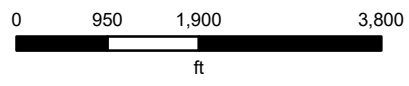


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Exhibit 1: Vicinity Map

Knoxville - Knox County - KUB Geographic Information System

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