

Request for Proposals (RFP)

Operational Optimization Consulting Services

Buildings & Facilities Management Division (BFM)

This document defines the mandatory scope, proposal requirements, evaluation basis, and pricing submission requirements for BFM Operational Optimization consulting services. Any procurement remains subject to OIST procedures, approvals, and contract award.

1. Purpose and procurement approach

OIST invites qualified suppliers to submit proposals for BFM Operational Optimization consulting services covering both mandatory Work Package A and mandatory Work Package B under a single contract. The selected supplier will be expected to deliver an integrated, practical, and implementable engagement in accordance with this RFP.

1. This RFP is issued as a single procurement covering both Work Package A and Work Package B; bidders must propose and price both packages.
2. OIST will evaluate proposals against procurement requirements.
3. The successful bidder will be required to complete the full mandatory scope no later than 31 March 2027.
4. All bidders will be evaluated on the same submission requirements, pricing matrix, and evaluation criteria.

Bidders shall submit proposals that comply with the defined scope, mandatory requirements, and deliverables. Within those requirements, bidders should explain their proposed methodology, delivery approach, assumptions, and any practical refinements that would improve delivery. Clarification questions may be used to identify genuine ambiguities in the RFP. Any alternative approach must be clearly identified and must not reduce or materially change the mandatory scope, deliverables, completion requirements, or pricing submission requirements.

2. Background

The Okinawa Institute of Science and Technology Graduate University (OIST) operates a research-intensive campus environment that combines academic, laboratory, residential, infrastructure, transportation, and campus support functions. The Buildings & Facilities Management (BFM) Division provides and manages facilities-related services that support safe, reliable, and effective campus operations.

BFM's operating environment includes, among other functions, campus building management, maintenance and engineering support, laboratory utility systems, critical infrastructure systems, security and life-safety coordination, housing operations, shuttle bus services, workplace and space support, and coordination with internal and external stakeholders. BFM has a semi-public, semi-private position and role, and as such must ensure the proper conduct of public works bidding and contracting.

OIST is exploring improvements to BFM's future operating model to support a larger and increasingly complex campus, strengthen clarity of responsibility across functions, improve resilience and continuity of services, support effective cost management, and enhance knowledge transfer and process documentation. The intended focus is practical organization and governance design, not a comprehensive technical condition assessment of campus assets.

3. Objectives

- Develop a practical target operating model for BFM that is clear, resilient, scalable, cost-conscious, and capable of being implemented in phases.
- Improve clarity of ownership across functions, sections, vendors, and internal stakeholders.
- Support continuity planning, succession depth, and appropriate backup arrangements for priority functions.

- Recommend practical improvements to governance, processes, role clarity, digital enablement, selective outsourcing, and service delivery methods where supported by the assessment.
- Strengthen BFM-specific processes for security, emergency response support, and business continuity management.
- Provide recommendations that can be used to support decision making and business cases for BFM management, executive leadership, and related governance bodies.

4. Requested work packages

Bidders shall submit one integrated proposal covering both mandatory work packages below. Pricing shall identify each work package separately, reconcile to the combined total, and show any discount or efficiency adjustment for concurrent delivery. Both work packages are expected to proceed on broadly the same timetable. Bidders may propose their own team structure and delivery approach, but must demonstrate sufficient resourcing to complete all mandatory services within approximately four months from commencement and no later than 31 March 2027. Completion by the end of February 2027 is preferred where credible and practicable.

Work package	Purpose	Primary outputs
A. BFM organization and service delivery model	Review and recommend improvements to BFM's organization, roles, responsibilities, staffing model, governance, and future service delivery approach.	Target operating model options, recommended organization model, responsibility matrix, resourcing and outsourcing recommendations, implementation roadmap.
B. Security and BFM risk management processes	Review and improve BFM-specific processes for security management, emergency response support, and continuity planning.	Process improvement roadmap, SOP/procedure framework, role and capability recommendations, knowledge-transfer plan and training.

5. Work Package A: BFM organization and service delivery model

5.1 Scope of services

- Review existing BFM organization charts, role descriptions, responsibility matrices, service scope information, and relevant background materials provided by OIST.
- Conduct structured interviews and/or workshops with a representative sample of BFM management, supervisory staff, operational staff, and selected stakeholders to understand current service scope and capabilities, future requirements, priorities, constraints, and improvement opportunities.
- Benchmark BFM functions against relevant organizations and at least three related industries with comparable campus, research, laboratory, housing, critical systems, multi-service, or facilities management responsibilities, drawing on credible Japan-based and international experience.
- Assess the appropriate balance between in-house expertise, outsourced services, temporary support, and specialist consulting support, using agreed design principles such as service reliability, risk reduction, knowledge retention, cost effectiveness, scalability, staff capability, and continuity.
- Identify opportunities to improve role clarity, functional ownership, backup coverage, knowledge transfer, cost effectiveness, and service resilience.
- Prepare phased target organization charts and operating model options covering three phases spanning different financial years and ranging from reorganization of the current state through to an “ideal” future state. Phasing is required due to constraints imposed by the existing structure and budget, and time required to implement different aspects of the strategy.

- Recommend a practical change management and implementation governance approach, including review checkpoints with OIST, decision gates, dependencies, and approval points that support internal understanding and leadership decision-making while preserving the consultant's independent assessment.
- Assess the financial implications of each operating model option, including staffing assumptions, outsourcing assumptions, transition costs, indicative ongoing operating costs, anticipated savings, and key financial risks.

5.2 Expected deliverables

Deliverable	Description	Pricing basis requested
A1. Inception plan	Confirmed project approach, schedule, information request list, interview/workshop plan, assumptions, proposed design-principles workshop, and OIST review checkpoints.	Included in WP A fixed price.
A2. Current-state summary	Neutral summary of existing service scope, organization, governance, operational context, and key design implications, written in a form suitable for internal use.	Included in WP A fixed price.
A3. Benchmark and best-practice review	Relevant benchmarks and examples from comparable institutions and at least three related industries, including Japan-based and international practices, campuses, research facilities, outsourced FM models, or mixed delivery models.	Included in WP A fixed price. State benchmark coverage, sources or source types, depth, and limitations; specific client names may be anonymized where confidentiality requires.
A4. Target operating model options	Phased operating model options in three phases ranging from reorganization of the current state through to an “ideal” future state. For each option, include pros, cons, dependencies, risks, staffing assumptions, outsourcing assumptions, transition costs, estimated ongoing operating costs, anticipated savings, and implementation considerations.	Included in WP A fixed price, including the three required phased options and associated financial modelling.
A5. Recommended BFM model	Recommended organization and service delivery model, including high-level roles, seniority assumptions, functional ownership, mapping of existing positions and responsibilities to proposed functions, outsourcing opportunities, and transition approach. Include a summary comparison of costs and benefits between the recommended model and the current operating model, including key assumptions, without evaluating individual employee performance.	Included in WP A fixed price.
A6. Implementation roadmap	Prioritized roadmap with short-, medium-, and longer-term actions, dependencies, indicative sequencing, OIST review points, decision gates, and approval points. Include assessment of initial costs, transition costs, anticipated savings from outsourcing or service redesign, and long-term operating cost implications.	Included in WP A fixed price.
A7. Executive summary materials	Concise written summary and presentation materials suitable for executive review and internal communication. Primary materials should be in English, with Japanese translation for agreed executive summary materials and other agreed items requiring bilingual use.	Included in WP A fixed price for the agreed English and bilingual outputs specified in the proposal and contract.

6. Work Package B: Security and BFM risk management processes

6.1 Scope of services

- Review BFM's current mandate, governance, rules, policies, procedures, processes, and operating documents for security management, emergency response support, and BFM-specific business continuity planning.
- Benchmark BFM-relevant processes against appropriate campus, research facility, laboratory, or critical infrastructure practices.
- Review and propose changes to the priority BFM rules, policies, procedures, processes, SOPs, emergency contact flows, call trees, training materials, and knowledge-transfer arrangements within BFM's security mandate, reflecting applicable requirements, good practice, OIST context, and BFM senior management feedback.
- Develop a practical role and capability model that enables BFM to retain the required in-house knowledge. The model should explain the respective roles of a BFM Security Manager, vendors, consultants, and other OIST stakeholders, including interim and longer-term arrangements.
- Create, revise, consolidate, or simplify the agreed priority rules, policies, procedures, processes, SOPs, templates, and supporting documents needed to implement the revised governance and management frameworks.

6.2 Expected deliverables

Deliverable	Description	Pricing basis requested
B1. Process review plan	Confirmed approach, document request list, interview/workshop plan, and schedule.	Included in WP B fixed price.
B2. Process and responsibility map	Map of relevant BFM responsibilities, interfaces, escalation points, and vendor/stakeholder touchpoints.	Included in WP B fixed price.
B3. Improvement roadmap	Prioritized recommendations for process improvement, documentation, training, and governance, covering the full mandatory scope and identifying sequencing, dependencies, and implementation priorities.	Included in WP B fixed price.
B4. Rules, policies, procedures, SOPs, and template framework	Recommended document hierarchy and template pack, emergency contact flow/call tree structure, document control approach, and drafting or revision of the agreed priority BFM rules, policies, procedures, processes, SOPs, and templates within the core scope.	Included in the WP B fixed price. The bidder shall state the assumed number, types, and level of effort for documents to be created or revised within the core scope. The final priority list will be agreed during inception without reducing the overall included level of effort. Unit rates shall be provided for additional documents requested through an approved variation.
B5. Role and capability recommendations	Recommendations for role coverage, capability development, knowledge transfer, vendor oversight, and interim vs long-term arrangements, including the practical responsibilities of a BFM Security Manager or nominated BFM staff after the consulting engagement.	Included in WP B fixed price.
B6. Training and knowledge-transfer plan	Training and knowledge-transfer plan and delivery, including practical handover to the BFM Security Manager or nominated BFM staff so that the revised frameworks can be	Included in WP B fixed price for training and knowledge transfer during

	applied and managed on an ongoing basis. Completion includes final framework documents, agreed training, practical handover, and confirmation of how nominated BFM staff will maintain and apply the framework.	the main consulting period. Post-project support is outside the evaluated mandatory scope and shall be shown only as reference unit rates or a separately identified reference package.
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7. Scope boundaries, variations, and reference rates

The fixed prices for Work Package A and Work Package B shall cover all mandatory services and anticipated work required to complete the stated scope within FY2026. Bidders shall not reclassify stated core deliverables as optional.

Bidders shall provide unit rates for additional or unforeseeable work and for post-project support. Post-project support is for reference only, is not part of the mandatory evaluated scope, and must not be included in the evaluated fixed price.

The following are not considered part of the mandatory scope:

- Implementation of organizational changes after approval.
- Individual employee performance assessment, disciplinary review, or recommendations about specific personnel outcomes. However, mapping existing positions and functional responsibilities to the revised organization chart is included in the core scope, without evaluating individual performance.
- Detailed job evaluation or employment law advice. Salary benchmarking and related cost modelling may be included as an optional priced item where needed to compare organization models with different in-house, outsourced, seniority, or staffing-level assumptions.
- Procurement or retendering of outsourced FM service contracts.
- Detailed engineering design, technical audit, statutory inspection, physical condition survey, or comprehensive asset condition assessment.
- Implementation of IT systems, asset management software, help desk platforms, or workflow tools.
- Additional drafting or revision beyond the agreed core set of priority BFM rules, policies, procedures, processes, SOPs, and templates. Such additional work may be instructed only through an approved variation using the submitted unit rates.
- Full Japanese translation of every deliverable is not required unless identified in the final contract or otherwise agreed. However, bilingual English/Japanese capability is mandatory for interviews, workshops, benchmarking, review of Japanese and English source materials, stakeholder engagement, and selected bilingual deliverables such as agreed executive materials and emergency response documents.

8. Information and support to be provided by OIST

OIST expects to provide appropriate information to the successful bidder after contract award, subject to confidentiality, data protection, and internal approval requirements. The information package may include:

- Overview of BFM scope, services, organizational structure, and major service interfaces.
- Current and historical organization charts, where relevant to understanding service scope and responsibilities.
- Role descriptions, responsibility matrices, and related internal reference documents where available.
- High-level information about OIST's campus, buildings, residential facilities, laboratory support environment, and major facilities-related services.

- Relevant existing SOPs, emergency response materials, BCP materials, process documents, and vendor interface information, where available.
- Preliminary internal studies, working drafts, and management hypotheses prepared by OIST for discussion purposes.
- Access to nominated BFM managers, selected staff, and related internal stakeholders for interviews or workshops.
- A primary OIST point of contact for coordination, information requests, schedule management, and deliverable review.
- Meeting rooms, visitor access, and reasonable on-campus working arrangements for agreed on-site work.
- Guidance on confidentiality, internal communications, data handling, and approval processes.

9. Mandatory bidder requirements

A bidder must meet all of the following requirements to submit a compliant proposal:

- Complete the OIST Pricing Matrix and price all anticipated mandatory work within FY2026, while also providing unit rates for approved additional or unforeseeable work and reference rates for post-project support.
- Provide sufficient project leadership, specialist capability, availability, and resourcing to complete all mandatory work no later than 31 March 2027.
- Accept and deliver both Work Package A and Work Package B as mandatory components of one RFP and one integrated engagement.
- Demonstrate international operations or access to international expertise and benchmarks relevant to the engagement.
- Demonstrate relevant experience across at least three related industries or client sectors and sufficient active FM presence in Japan to support credible cross-sector benchmarking.
- Provide effective bilingual English/Japanese delivery support for interviews, workshops, Japanese source-material review, stakeholder engagement, and agreed bilingual outputs.

10. Supplier response requirements

To support fair and consistent evaluation, bidders shall use the response structure below and provide enough detail for OIST to assess every published evaluation criterion.

Section	Requested content
1. Understanding of scope	Understanding of OIST's requirements, operating context, mandatory scope, constraints, and intended outcomes, including the bidder's interpretation of the key delivery challenges and success factors.
2. Proposed method	Separate methodology for Work Package A and Work Package B, including phases, milestones, activities, interviews/workshops, Japan and international benchmarking, quality assurance, integration between packages, and assumptions.
3. Deliverables	Confirm and map all mandatory deliverables to the proposed methodology, schedule, responsible team members, and fixed price. For Work Package B, state the assumed number, types, and level of effort for core documents to be created or revised. Clearly identify only genuine exclusions permitted by this RFP and reference-rate items outside the mandatory scope.
4. Project team	Proposed roles, seniority, relevant work histories, availability, estimated effort by role and work package, on-site/off-site or hybrid split, bilingual capability, specialist inputs and rationale for the proposed resourcing approach.
5. Schedule	Integrated schedule for each work package showing major activities, stakeholder engagement, review points, draft and final deliverables, OIST dependencies, decision points, earliest practical start date, and resource loading. The schedule must

	demonstrate completion within approximately four months and no later than 31 March 2027; completion by the end of February 2027 is preferred where practicable.
6. Pricing	Complete the separate OIST Pricing Matrix in full. Show WP A and WP B separately, the combined price, any concurrent-delivery discount or adjustment, included mandatory costs, tax treatment, unit rates for additional or unforeseeable work, and reference rates for post-project support. A bidder may append its own detailed pricing breakdown, but the OIST format remains mandatory for evaluation.
7. OIST input required	Documents, stakeholder access, decision timing, data, facilities, review checkpoints, or other support required from OIST.
8. Risks, assumptions, and clarifications	Material delivery risks, dependencies, assumptions, clarifications, and proposed mitigations. Bidders may explain practical refinements to their methodology or delivery approach, provided the proposal remains compliant and does not reduce or materially change the mandatory scope, deliverables, completion requirements, or pricing submission requirements.
9. Relevant experience	Relevant FM, operating model, organization and governance, outsourcing, security, risk, continuity, and transformation experience; experience across at least three related industries or client sectors, including campuses, research facilities, laboratories, or data centres; active and ongoing FM business presence in Japan and benchmarking capability; international business presence or relevant international project experience; and examples appropriate to the published evaluation criteria.

11. Pricing submission and OIST Pricing Matrix

Bidders shall complete the separate OIST Pricing Matrix exactly as issued so OIST can compare proposals consistently. The evaluated fixed price shall include all anticipated mandatory professional fees, travel, expenses, and other costs for both work packages. Prices shall be stated in JPY, excluding 10% consumption tax, with tax shown separately. The matrix shall reconcile WP A, WP B, shared costs, any concurrent-delivery discount or adjustment, total excluding tax, consumption tax, and total including tax. Unit rates for approved additional or unforeseeable work and reference rates for post-project support shall be stated separately and shall not be included in the evaluated fixed price unless expressly instructed by OIST. A bidder may append its own detailed pricing breakdown, but must also summarize all prices and unit rates in the OIST format.

Item	Description	RFP pricing requirement
WP A base scope	Organization and service delivery model review and recommendations.	Fixed price in JPY excluding tax; all mandatory WP A costs included.
WP B base scope	Security and BFM risk management process review and recommendations.	Fixed price in JPY excluding tax; all mandatory WP B costs included.
Combined award adjustment	Concurrent-delivery discount or other adjustment reflected in the evaluated combined price.	JPY amount, with percentage shown if helpful.
On-site work	Number of consultant days on campus, by role, work package, and phase.	Days by role and allocation within the relevant fixed price; not an additional charge.
Off-site work	Number of consultant days off-site, by role, work package, and phase.	Days by role and allocation within the relevant fixed price; not an additional charge.
Travel and expenses	Flights, accommodation, local travel, per diem, and other reimbursable costs.	Included amount and basis within the evaluated fixed

		price; not an additional charge.
Additional / unforeseeable work	Approved variations outside the mandatory scope, such as additional documents, workshops, modelling, translation, training, or other work that could not reasonably be anticipated at proposal stage.	Unit rates and charging basis, excluding tax, with validity period and conditions.
Post-project support reference rates	Support after final acceptance, such as advisory hours, implementation check-ins, or additional training. Reference only and outside the mandatory RFP scope.	Reference unit rates or package prices, excluding tax, clearly separated from the evaluated fixed price.

12. RFP procurement and delivery schedule

Milestone	Indicative timing	Notes
Issue formal public RFP	Date stated in procurement notice	OIST to issue the RFP and associated submission documents through the formal procurement process.
Bidder clarification questions due	Date and time stated in procurement notice	Questions should identify genuine ambiguities and shall be handled through the formal clarification process.
OIST responses to bidder questions	Date stated in procurement notice	Responses or addenda issued in accordance with the formal procurement process.
Final proposals due	Date and time stated in procurement notice	Bidders to submit complete technical and commercial proposals, completed Pricing Matrix, required declarations, and supporting information.
Evaluation and contract award	In accordance with the procurement schedule	OIST to evaluate compliant proposals, complete approvals, and proceed to contract award.
Project commencement	Following contract award	Start date may vary. The bidder shall mobilize promptly and maintain sufficient flexibility to protect the required completion date.

13. Language and deliverable requirements

- Core reporting language: English. Effective Japanese capability is mandatory for staff interviews, workshops, review of Japanese and English source materials, stakeholder engagement, benchmarking where relevant, and selected bilingual deliverables agreed in the scope.
- The bidder shall state which deliverables will be provided in English and which agreed items will be bilingual. All bilingual outputs included in the mandatory scope shall be included in the evaluated fixed price.
- The bidder shall include all anticipated costs for required bilingual facilitation, Japanese-language source review, and agreed bilingual materials in the evaluated fixed price. Unit rates may be provided for additional translation or interpretation requested outside the mandatory scope.

Bidders shall treat all non-public information received from OIST as confidential and shall not include sensitive internal details in proposal materials unless required to explain proposal assumptions and clearly marked as confidential.

14. Evaluation of proposals

OIST will assess compliant proposals against the following evaluation criteria. Bidders shall provide sufficient, clearly structured information to permit evaluation against each criterion. Internal ratings, scoring guidance, and evaluation moderation procedures are not part of the bidder submission requirements:

- Understanding of Requirements.
- Methodology and Approach, Work Package A.
- Methodology and Approach, Work Package B.
- Relevant Experience, Benchmarking and Transformation Capability.
- Project Team, Resourcing and Schedule.
- Deliverables and Knowledge Transfer.
- Commercial and Contractual Compliance.
- Price.

Appendix A: Bidder compliance checklist

Checklist item	Bidder confirmation
Mandatory proposal covers both WP A and WP B, with separate and combined pricing	Yes / No
Concurrent-delivery discount or adjustment stated, including confirmation where no discount or adjustment applies	Yes / No
Assumptions and exclusions clearly stated	Yes / No
Estimated consultant effort by work package, role, and on-site/off-site split provided	Yes / No
Deliverables mapped to price lines	Yes / No
OIST inputs and decision dependencies listed	Yes / No
Bilingual support approach stated	Yes / No
Unit rates for additional or unforeseeable work and reference post-project support rates provided	Yes / No
Experience across at least three related industries or client sectors, Japan-based FM presence, and international capability included	Yes / No