



Attention Design Firms

If you are downloading the RFQ from the website, continue to monitor the website for addenda. Failure to incorporate any addenda into your submittal may cause your submittal to be considered non-responsive.

Thank you.

OREGON STATE UNIVERSITY

REQUEST FOR QUALIFICATIONS #188976

Marine Studies Initiative Building Commissioning

ISSUE DATE: June 2, 2017

RFQ CLOSING (DUE) DATE: June 21, 2017, 2:00 p.m. Pacific Time

NO LATE RESPONSES WILL BE ACCEPTED

CONTRACT ADMINISTRATOR:

Brooke Davison, Construction Contract Officer
Construction Contract Administration
Oregon State University
644 SW 13th Ave.
Corvallis, OR 97333
Phone: (541) 737-7342
FAX: (541) 737-5546
Email: brooke.davison@oregonstate.edu

SOLICITATION / SELECTION PROTESTS:

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644 SW 13th Ave.
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1.0 Introduction:

Oregon State University (OSU) is soliciting the services of a consulting firm to provide commissioning services for equipment and systems to be designed for and installed in the Marine Studies Initiative building (MSI) at Hatfield Marine Science Center (HMSC) in Newport, Oregon. Equipment and systems may include, but not be limited to HVAC, HVAC controls (EMS), electrical/secured power, emergency generator system, communications, security (including closed circuit television system), electronic (including voice and data wiring system and data communications system), irrigation system, and fire protection.

2.0 Project Description:

The Marine Studies Initiative building will be constructed on an undeveloped site at HMSC. The 70,000 square foot +/- building will primarily serve as a teaching and research facility. It will also include a two hundred-fifty (250) seat auditorium and an innovation lab (maker space).

Yost Grube Hall Architecture, Inc. is the project architect. PAE Consulting Engineers, Inc. is providing mechanical, electrical and plumbing design. The construction manager/general contractor is Andersen Construction Company.

Commissioning services will conform to:

(a) "Model Commissioning Plan and Guide Specifications" for large buildings, prepared by Portland Energy Conservation, Inc. (PECI), <http://www.peci.org/model-commissioning-plans-guide-specifications> ;

(b) additional guidelines published in the Commissioning Toolkit dated February 1998, prepared by Peci and sponsored by the Oregon Office of Energy;

(c) the LEED building certification criteria, refer to LEED Reference Guide Version 2.1 (www.leedbuilding.org); and

(d) The HVAC Commissioning Process, most recent ASHRAE Standards & Guidelines.

Respondents are strongly encouraged to review the above-referenced models, guidelines, and criteria carefully prior to preparing and submitting a Response, in order to appreciate the complexity, comprehensiveness, and level of detail of Services required of the Commissioning Agent under the Contract to be awarded.

Two phases of commissioning services are required. The first phase is expected to begin during design development and will include design review and development of documents related to design intent (Owner Project Requirements); development of a commissioning plan; specifications; an Owner training plan; and development of performance test procedures. The project basis of design will have already been established. The Commissioning Agent shall review the design documents and work with the Engineer of Record to ensure that Owner Project Requirements are incorporated into the design. Reviews shall be performed at approximately 100% design

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development and 90% construction documentation.

The second phase of commissioning will begin at start of construction, and will continue through acceptance of the project by Owner. The scope of services to be provided during the second phase may include, but not be limited to, implementation of the commissioning plan and specifications; inspection of equipment and systems; preparation of complete documentation (including checklists, logs, reports, etc.) of all equipment and systems testing and inspections; provision of training sessions for OSU personnel, observation of systems and equipment testing; review of operations and maintenance (O&M) manuals; and review of relevant shop drawings and submittals. Commissioning services will also include testing, adjusting, and balancing (“TAB”) services as well as an irrigation audit.

In the performance of commissioning services, the Commissioning Agent will be responsible for coordinating its performance with that of the Architect, its staff and consultants, and with the CM/GC and their staff and subcontractors.

3.0 Energy Efficiency:

OSU does not intend to have the facility certified through the LEED process, but the design is expected to achieve minimum of LEED Silver equivalent.

4.0 Design and Construction Timeline

Construction is anticipated to begin December 2017 and be complete by June 2019.

5.0 Total Project Budget

The projected total project cost is approximately \$50M with a direct construction budget of approximately \$36.7M.

6.0 Selection Process:

This Request for Qualifications selection process will be conducted pursuant to the terms of this RFQ and OSU Standard 580-063-0020, relating to the selection and retention of professional consultants.

7.0 Compensation:

Compensation will be based on a total “not-to-exceed” amount for services and reimbursable expenses, with “not-to-exceed” maximums for the Phase One/ Initial Basic Services and Phase Two/Additional Basic Services as described in the sample contract attached as an exhibit. The amount of compensation will be negotiated with the respondent who has submitted the best qualifications (the Apparent Successful Respondent). **No cost proposal or price information is to be submitted with qualification responses.**

8.0 Evaluation Criteria:

Indicate in writing the following information about your firm's ability and desire to perform this work. Qualification responses will be rated based upon the weight assigned to each item as noted in the parenthesis at the end of each statement below.

- 8.1.1 Provide a brief description of your firm. Include your firm's organizational chart (not the "project's organizational chart). List the projects your firm is currently contracted for, the key personnel for those projects, and the stage the projects are in terms of completion. (Weight: 15)
- 8.1.2 Describe your firm's experience over the past five years on projects of similar size and scope. Include at least three (3) specific projects you feel are comparable to this project. Also include information about the services your firm provided for each project, the key personnel assigned and their specific roles, and the dates the projects were started and completed. *Include owner contacts with current telephone numbers.* (Weight: 20)
- 8.1.3 Identify key personnel who would be assigned to this project. Include proposed key personnel's certifications, responsibilities on previous commissioning projects, and specific responsibilities for this project. *Provide contact information (including email) for each identified key person.* (Weight: 25)
- 8.1.4 Identify any sub-consultants and the key personnel of the sub-consultants you propose to use on this project. Describe their recent (past five years) experience and the key personnel's specific role in commissioning of similar projects. Provide contact information (including email) for each identified key-person. *Identify your firm's role in each of these projects (if applicable).* (Weight: 10)
- 8.1.5 Provide an example of a commissioning plan, inspection/observation report for equipment testing, and an owner training plan that your firm has utilized on previous projects. **This information should be attached to the response as an appendix and as such will not count toward the twenty-five (25) page limit.** (Weight: 20)
- 8.1.6 Provide a description and identification of Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Emerging Small Business (ESB), or Disabled Service Veterans (DSV) certifications for your firm and /or sub-consultants. Provide historical information on MBE, WBE, ESB, or DSV Joint Ventures, subcontracting or mentoring plan, and utilization history for projects completed by your firm within the past three (3) years.
Describe of your nondiscrimination practices and provide a description of your current workforce diversity program/plan. Include a description of the outreach program or plan utilized for selecting sub-consultants proposed in Section 8.1.4 above, including specific steps taken to maximize broad based and inclusive participation and the plan to provide mentoring, technical or other business development services to sub-consultants needing or requesting such services.

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The selected firm will provide the services with respect to diversity according to the means and methods described in the workforce plan described in the response, unless changes are requested and approved in writing in advance by OSU or are required by applicable laws, ordinances, codes, regulations, rules or standards. (Weight: 20)

9.0 References:

In addition to responding to the evaluation criteria above, provide the names, addresses and phone numbers of three owners and three architects or engineers to be used as references for this project. Verify that the individuals identified have had direct contact with the referenced project, and the phone number is current. Do not include references from any firms or individuals included in your design team for this Project or any OSU personnel. OSU may check with these references and with other references associated with past work of your firm.

10.0 Selection Procedure and Timetable:

The selection procedure described below will be used to evaluate the capabilities of interested firms to provide the professional services to OSU for this project.

June 2, 2017	Issue RFQ
June 21, 2017	RFQ response due 2:00 p.m., Pacific Time
July 21, 2017	Fee Proposal Deadline (for Apparent Successful Respondent)/Estimated Notice of Intent to Award
August 1, 2017	Estimated Contract Execution

Site Visit: No mandatory site visits are required as part of the selection process.

11.0 Evaluation Process:

This RFQ is a single step process for the selection of a Commissioning Agent for the Project. The responses to this RFQ will be evaluated by the selection committee, which will be comprised of university personnel who score qualification statements and another group of university personnel who serve as advisors but do not score qualifications. OSU will utilize this RFQ process to obtain information to enable selection of the most qualified respondent through evaluation of:

- a. The respondents' responses to evaluation criteria in Section 8 of this document;
- b. The results of discussions with the respondents' references and others.

Each criterion listed in Section 8 above, has been assigned a weight between ten (10) and twenty-five (25). Each member of the evaluation committee will rate each firm in each criterion between one (1) and five (5) (five being the highest), and multiply that number by the weight assigned to the criterion. The evaluation committee members

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will then total the weighted score from all of the criteria to obtain the total score. The result of this total score will be used to rank all respondents. The respondent that has the highest overall ranking will be deemed the Apparent Successful Respondent.

If, during the discussion, the selection committee determines the respondents' total score are too close, the university has no recent experience working with a respondent, or if the consolidated total score indicates a tie, the committee will check the references provided by the respondent as required by this RFQ. Information obtained from references may alter the committee's total score of respondents. Any alteration of total score will be based on committee's understanding of how well each firm can meet the needs of the Project and University.

OSU will then negotiate with the Apparent Successful Respondent the price and specific statement of work of a contract, consistent with OSU's Commissioning Agent Agreement attached to this RFQ. If OSU and the Apparent Successful Respondent are unable to reach agreement, OSU will negotiate with the second-ranked respondent, etc. The sample agreement may contain certain notes or alternative provisions. Those alternative provisions will be included at the sole discretion of OSU.

12.0 Responsibility Evaluation:

OSU reserves the right to investigate each respondent's responsibility in accordance with the requirements of Division 61 of OSU Standard Chapter 580, and will consider information obtained from any source as part of its evaluation, at any time prior to execution of a contract. Submission of a signed qualification response constitutes the respondent's approval for OSU to obtain any information OSU deems necessary to conduct the evaluation including, but not limited to, credit reports and information discovered during reference checks.

Financial Information: OSU will notify respondents, in writing, of any financial documentation required, which may include recent profit-and-loss history; current balance statements; assets-to-liabilities ratio, including number and amount of secured versus unsecured creditor claims; availability of short and long-term financing; bonding capacity and credit information.

OSU may postpone the award or execution of a contract in order to complete its investigation and evaluation. Failure to promptly provide complete information requested will render the qualification response nonresponsive. Failure of a respondent to demonstrate responsibility will render it non-responsible and constitute grounds for qualification response rejection.

13.0 Submission:

Submit **five (5)** hard copy versions of your written qualification response, along **with one (1) electronic version on a thumb drive** to be received by the closing date and time listed in this document to:

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Attention: Brooke Davison
Construction Contract Administration
Oregon State University
644 SW 13th Ave.
Corvallis, OR 97333

Your qualification response must be contained in a document **not to exceed twenty-five (25) single sided pages (do not print double sided)**, including pictures, charts, graphs, tables and text the respondent deems appropriate to be part of the review of the respondent's response. Resumes of key individuals proposed to be involved in this project are exempted from the twenty-five (25)-page limit and should be **appended to the end of your response**. No supplemental information to the twenty-five (25)-page qualification response will be allowed. Appended resumes of the proposed key individuals, along with a transmittal letter, table of contents, front and back covers, blank section/numerical dividers, etc., and commissioning plan, inspection/observation report and owner training plan identified in Section 8 above, will not be counted in the twenty-five (25)-page limit.

Information should **be presented in the same order as the above evaluation criteria**. **The electronic qualification response should be sized appropriately for transfer (under 8 MB)**. The written response should be submitted in a **soft-bound** (comb or spiral, spiral preferred – no three-ring binders) format with page size of **8 ½ x 11 inches** with no fold-outs. The basic text information of the response should be presented in standard business font size, and reasonable margins.

Your qualification response must be signed by an officer of your firm with the authority to commit the firm and contain contact information *including email* for communication purposes.

OSU may reject any qualification response not in compliance with all prescribed public bidding procedures and requirements, and may cancel this solicitation or reject for good cause all qualification responses upon a finding by OSU that it is in the public interest to do so.

Note that OSU will not accept qualification responses or queries that require OSU to pay the cost of production or delivery.

OSU is an AA/EEO employer.

Telephone, facsimile, or electronically transmitted submittals will not be accepted.

Qualification responses received after the closing date and time will not be considered.

14.0 Questions:

All questions and contacts with the OSU regarding any information in this RFQ must be addressed in writing, fax or email to Brooke Davison at the address, email or fax listed in

this document no later than June 14, 2017 at 4:00 p.m., Pacific Time.

15.0 Solicitation Protests:

You may submit a written request for clarification or change or protest of particular solicitation provisions and specifications and contract terms and conditions (including comments on any specifications or terms that you believe limits competition) to the Chief Procurement Officer in care of Brooke Davison at the address, email or fax listed in this document. Requests and protests must be received no later than June 7, 2017 at 5:00 p.m., Pacific Time. Requests or protests must state the reasons for the request or protest and any proposed changes to the solicitation provisions and specifications and contract terms and conditions.

16.0 Change or Modification:

Any change or modification to the specifications or the procurement process will be in the form of an addendum to the RFQ and will be made available in the form of an addendum posted to the OSU Business and Bid Opportunities (<http://bid.oregonstate.edu/>) website. No information published in any other manner will serve to change the RFQ in any way, regardless of the source of the information. Any request for clarification or change or protest of anything contained in an addendum not received by the date and time stated in the addendum will not be considered.

17.0 Selection Protests:

Any respondent to this RFQ who claims to have been adversely affected or aggrieved by the selection of a competing respondent may submit a written protest of the selection to the Chief Procurement Officer in care of Brooke Davison at the address given in the RFQ within three days after notification of that selection. Any such protests must be received by Ms. Davison no later than three days after the notification of selection has been made in order to be considered. The selection decision notification will be made by OSU via posting to the OSU Bid and Business Opportunities website (bid.oregonstate.edu).

18.0 Proprietary Information:

OSU will retain this RFQ, one copy of each qualification response received and an electronic copy of each qualification response received, together with copies of all documents pertaining to the award of a contract. These documents will be made a part of a file or record, which will be open to public inspection after OSU has announced an Apparent Successful Respondent or all qualification responses have been rejected. If a qualification response contains any information that you consider to be a trade secret under ORS 192.501(2), you must mark each trade secret with the following legend: **"This data constitutes a trade secret under ORS 192.501(2), and must not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192."**

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets,

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and the exemption from disclosure applies only "unless the public interest requires disclosure in the particular instance."

Therefore, non-disclosure of documents or any portion of a document submitted as part of a qualification response may depend upon official or judicial determination made pursuant to the Public Records Law.

In order to facilitate public inspection of the non-confidential portion of the qualification response, material designated as confidential must accompany the qualification response, but must be readily separable from it. Prices, makes, model or catalog numbers of items offered, scheduled delivery dates, and terms of payment will be publicly available regardless of any designation to the contrary. Any qualification response marked as a trade secret in its entirety will be considered non-responsive and will be rejected.

19.0 Project Termination:

OSU is seeking to award a commissioning agent's agreement to a consulting firm for the Project; however, OSU reserves the right to terminate the project and the agreement, at any phase in the project.

20.0 Insurance Provisions:

During the term of the resulting contract, the successful respondent will be required to maintain in full force, at its own expense, from insurance companies authorized to transact the business of insurance in the state of Oregon, each insurance coverage/policy as set forth in the Agreement.

21.0 Additional Requirements:

Pursuant to OSU Standard 580-061-0030, by submitting a qualification response, the respondent certifies that the respondent has not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts.

Pursuant to OSU Standard 580-061-0040, respondents are hereby notified that policies applicable to consultants and contractors have been adopted by OSU that prohibit sexual harassment and that respondents and their employees are required to adhere to OSU's policy prohibiting sexual harassment in their interactions with members of OSU's community.

Enclosures:

OSU Sample Commissioning Agent's Agreement

End of RFQ