

# **ATTENTION COMMISSIONING FIRMS!**

**IF YOU DOWNLOAD THE RFP FROM THE WEBSITE, IT IS YOUR RESPONSIBILITY TO ADVISE US, VIA EMAIL, THAT YOU HAVE DONE SO (INCLUDE YOUR FIRM NAME AND ADDRESS, CONTACT PERSON, PHONE, FAX, AND EMAIL). THIS WILL ALLOW US TO ADD YOU TO THE PLANHOLDERS LIST AND ADVISE YOU OF ANY ADDENDUMS ISSUED. FAILURE TO DO SO MAY CAUSE YOUR SUBMITTAL TO BE NON-RESPONSIVE.**

EMAIL: [Donna.Thwing@oregonstate.edu](mailto:Donna.Thwing@oregonstate.edu)

# OREGON STATE UNIVERSITY

## REQUEST FOR PROPOSALS

(C160444)

New Student Residence Commissioning

**CONTRACT ADMINISTRATOR: Oregon State University**

*Donna Thwing*

*Construction Contracts Supervisor*

**Phone: (541) 737-7694**

**FAX: (541) 737-2170**

**WEB SITE:**

**<http://www.PaCS.oregonstate.edu/>**

ISSUE DATE: July 17, 2012

RFP CLOSING (DUE) DATE: July 31, 2012, 2:00 PM, Local Time

NO LATE PROPOSALS WILL BE ACCEPTED

### **SUBMITTAL LOCATION**

Oregon State University  
Procurement and Contract Services  
Attention: Donna Thwing  
Construction Contracts Supervisor  
644 SW 13th Street  
Corvallis, Oregon 97333-4238

## Introduction:

Oregon State University (OSU) is soliciting the services of a commissioning firm to provide commissioning services for equipment and systems to be designed for and installed in the New Student Residence project on the OSU Campus (the “Project”), which may include, but not be limited to HVAC, plumbing, HVAC controls (EMS), electrical/secured power, emergency generator system, security systems, fire alarm system, fire protection, lighting controls, TAB, and irrigation audit.

## New Student Residence

The new 90,000 square foot Student Residence will be located on OSU’s main campus on the gravel parking lot just south of Wilson Hall in Corvallis, Oregon. The project will include office space, student rooms, student lounge areas, staff apartment, laundry room, study areas, kitchens, and a student health services wing. The estimated direct construction budget for the Project is \$18.5 million.

Construction is anticipated to begin June 2013. The project (and associated commissioning) must be completed by August 2014. Opsis Architects has been selected as the project architect. PAE is providing electrical and mechanical engineering design services and energy analysis and will provide construction administration for the energy, electrical, and mechanical systems. Fortis Construction has been selected as the Construction Manager/General Contractor (CM/GC).

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.leadbuilding.org](http://www.leadbuilding.org)) and (d) The HVAC Commissioning Process, ASHRAE Guideline 1.1-2007 -- HVAC&R Technical Requirements for The Commissioning Process, [http://www.techstreet.com/ashrae/cgi-bin/family?product\\_id=1573306](http://www.techstreet.com/ashrae/cgi-bin/family?product_id=1573306).

Proposers are strongly encouraged to review the above-referenced models, guidelines, and criteria carefully prior to preparing and submitting a Proposal, in order to appreciate the complexity, comprehensiveness, and level of detail of Services required of the Commissioning Agent under contract. OSU does not intend to have the facility certified through the LEED process, however the design is incorporating as many LEED criteria as OSU deems desirable with a minimum goal of equivalent LEED Silver, and using the LEED format to track its progress.

Commissioning services may include, but not necessarily be limited to, all those listed in Parts I through IV of the Model Commissioning Plan and Guide Specifications. Commissioning service deliverables may include, but not necessarily be limited to, those listed in Section 3.11 of Section 17100.

Two phases of commissioning services are required. The first phase is expected to begin during construction documentation (at the end of schematic design) and will include design review and development of documents related to design intent and basis of design; development of a commissioning plan, specifications, and an owner training plan; and development of performance test procedures. 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. Some of these services may include the coordination of various trades. Commissioning services will also include testing, adjusting, and balancing (“TAB”) services as well as the 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, as well as with the CM/GC and their staff and subcontractors.

#### Selection Process:

This RFP and the selection process will be conducted pursuant to the terms of this RFP and the Oregon University System’s Administrative Rule OAR 580-063-0025, relating to the selection and retention of professional consultants on the OUS Retainer program.

#### 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 I, Initial Basic Services as described in the sample supplement attached as an exhibit to this RFP. The amount of compensation will be negotiated with the proposer who has submitted the best proposal (the Apparent Successful Proposer). No cost proposal or price information is to be submitted with proposals.

#### Proposal Requirements/Evaluation Criteria:

Please indicate in writing the following information about your firm’s ability and desire to perform this work. Firms will be rated based upon the weight assigned to each item as noted in the parentheses at the end of each statement below.

1. Provide a brief description of your firm. List the projects your firm is currently contracted for, the "key personnel" for those projects, and what stage you are in terms of completion. (weight 10)
2. Describe your local experience over the past five years on projects of similar size and scope (higher education, equivalent LEED, kitchens, offices, dormitories, etc.). Describe at least 3 specific projects you feel are comparable to this project. 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 25)
3. Identify the personnel in your firm who would be assigned to this project, their certifications and commissioning responsibilities on previous projects, and specific responsibilities for this project. Provide email addresses for each of your Key Personnel. (weight 25)
4. Identify your Testing and Balancing (TAB) sub consultant and their key personnel that you propose to use on this project. Describe their recent (past 5 years) experience and the key

personnel's specific role in balancing and adjusting of similar projects. Include information about the size, construction type, building uses, construction budget, and project timeline/completion date. Identify your firm's role in each of these projects (if applicable). (weight 25)

5. Identify your irrigation auditing sub consultant and their key personnel that you propose to use on this project. Describe their recent (past 5 years) experience and the key personnel's specific role in performing the irrigation audit on similar projects. Include information about the size, construction type, building uses, construction budget, and project timeline/completion date. Identify your firm's role in each of these projects (if applicable). (weight 15)
6. 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 Proposal as an appendix and as such will not count toward the 10 page limit.** (weight 25)

#### References:

In addition to responding to the evaluation criteria above, please provide the names, addresses and phone numbers of three owners, three architects, and three contractors to be used as references for this project. Please verify that the individuals identified have had direct contact with the referenced project, and the phone number is current. Please do not include references from any firms/individuals included in your "team" for this project. OSU may check with these references and/or may check with other references associated with past work of your firm. OSU will evaluate this information and any other independently obtained references that can provide background on your firm. This information will not be separately scored, but results obtained from these and any other reference checks will be assessed in determining the final ranking of proposals.

#### 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.

July 17, 2012	Issue RFP
July 31, 2012, 2:00 PM	RFP response due
August 15, 2012	Tentative Selection/Notification

#### Evaluation Process:

This RFP will use a single-step process to select a Commissioning Agent for this project through evaluation of written proposals submitted in response to this RFP.

Each of the evaluation criteria has been assigned a weight between 10 and 25. OSU will appoint an evaluation committee consisting of between 3 and 5 individuals. Each member of the evaluation committee will separately rank each proposal in each of the evaluation criteria between 0 and 5, and multiply that number by the weight assigned to the evaluation criteria. The

individual evaluation committee members will then total the weighted score from all of the criteria to obtain a total score for each proposal.

The evaluation committee will meet and compare the individual evaluation committee member rankings. The committee will discuss firm strengths and weaknesses and the individual evaluation committee member scorings. The evaluation committee discussion will result in the consolidated ranking from which the Apparent Successful Proposer will be selected based on all information received, presented, found, and heard. OSU will then negotiate with the Apparent Successful Proposer the price and specific statement of work of a supplement to the OUS Retainer Agreement substantially similar to the sample OUS Retainer Contract Supplement attached to this RFP. If OSU and the Apparent Successful Proposer are unable to reach agreement, OSU will negotiate with the second-ranked proposer, etc.

#### Responsibility Evaluation:

OSU will investigate each proposer's responsibility in accordance with the requirements of Division 61 of Oregon Administrative Rules 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 proposal constitutes the proposer'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 proposers, 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 proposal nonresponsive. Failure of a proposer to demonstrate responsibility will render it non-responsible and constitute grounds for proposal rejection.

#### Submission:

Submit **Six (6)** copies of your written proposal, **along with an electronic version on CD**, to be received by the closing date and time listed in this document to:

Donna Thwing  
Procurement and Contract Services  
Oregon State University  
644 SW 13<sup>th</sup> Street  
Corvallis OR 97333-4238  
Phone : 541-737-9635 FAX : 541-737-2170  
email : donna.thwing@oregonstate.edu

Your proposal must be contained in a document **not to exceed ten (10) single sided pages**, including pictures, charts, graphs, tables and text the firm deems appropriate to be included in review of the firm's proposal. Resumes of key individuals proposed to be involved in this project are exempted from the 10-page limit and should be **appended to the end of your proposal**. No supplemental information to the 10-page proposal will be allowed. Appended resumes of the proposed key individuals, transmittal letter, table of contents, front and back covers, the sample

commissioning plan identified in selection criteria item 5, and blank section/numerical dividers, etc., will not be counted in the 10-page limit.

Information should **be presented in the same order as the above evaluation criteria**. **The proposal 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 proposal should be presented in standard business font size, and reasonable (we prefer 1 (one) inch) margins.

**Each copy of your proposal must be signed by an officer of your firm with the authority to commit the firm.**

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

Please note that throughout this procurement, OSU will not accept proposals 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. Proposals received after the closing date and time will not be considered.**

Questions:

All questions and contacts with the University regarding any information in this RFP must be addressed in writing, fax or email to Donna Thwing at the address, email or fax listed in this document.

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 Donna Thwing at the address, email or fax listed in this document. Requests and protests must be received no later than 2:00 p.m., July 24, 2012. 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.

Change or Modification:

Any change or modification to the specifications or the procurement process will be in the form of an addendum to the RFP and will be made available by email from Donna Thwing to all prospective proposers who have notified OSU of their interest in proposing. No information published in any other manner will serve to change the RFP 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.

Selection Protests:

Any respondent to this RFP 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 Donna

Thwing at the Procurement and Contract Services address given in the RFP within five days after notification of that selection. Any such protests must be received by Ms. Thwing no later than five days after the notification of selection has been made in order to be considered. The selection decision notification will be made by Donna Thwing via email.

Proprietary Information:

OSU will retain this RFP and one electronic copy of each original proposal 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 Proposer or all proposals have been rejected. If a proposal contains any information that you consider to be a trade secret under ORS 192.501(2), you must mark each sheet containing such information 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, 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 proposal 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 proposal, material designated as confidential must accompany the proposal, 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 proposal marked as a trade secret in its entirety will be considered non-responsive and will be rejected.

Project Termination:

OSU is seeking to award a consultant's supplement to a commissioning firm for the design and construction phases; however, OSU reserves the right to terminate the project and the supplement, after completion of any phase in the project.

Certification of Compliance With Tax Laws:

By submission of your proposal, the signatory (a duly authorized representative of the submitting proposer) must certify that the proposer is not, to the best of their knowledge, in violation of any Oregon tax law. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250, ORS chapters 118, 314, 316, 317, 318, 321 and 323; the elderly rental assistance program under ORS 310.630 to 310.706; and local taxes administered by the Department of Revenue under ORS 305.620.



Additional Requirements:

Pursuant to OAR 580-061-0030, by submitting a proposal, the proposer certifies that the proposer has not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts.

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

Insurance Provisions:

During the term of the resulting contract, the successful proposer 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 attached Supplement.

Enclosures:

OUS Retainer Contract Supplement

End of RFP