

**MILLAR LIBRARY**  
**SPACE PLANNING AND FEASIBILITY STUDY**  
Solicitation #1508

Request for Proposals for Architectural Services



October 28, 2013

**Contents**

<b>SECTION 1 - ADMINISTRATIVE INFORMATION</b>	<b>1</b>
1.1 INTRODUCTION.....	1
1.2 SCOPE OF WORK.....	3
1.2.1 KICK-OFF MEETING.....	3
1.2.2 REVIEW OF EXISTING CONDITIONS.....	3
1.2.3 UNIVERSITY LIBRARY BEST PRACTICES.....	3
1.2.4 FUTURE SCENARIO DEVELOPMENT.....	3
1.2.5 CONCEPTUAL DESIGN STUDIES AND PHASED CONSTRUCTION APPROACH.....	4
1.2.6 ORDER OF MAGNITUDE COST ESTIMATES & IMPACTS TO OPERATING BUDGETS.....	4
1.2.7 REFINEMENT OF PREFERRED RECOMMENDATION.....	4
1.2.8 SUBMITTAL OF THE FINAL STUDY.....	4
1.3 SELECTION PROCEDURE AND ANTICIPATED TIMETABLE.....	5
1.4 RESPONSE.....	5
1.5 RESERVED.....	6
1.6 INSURANCE AND LICENSURE REQUIREMENTS Insurance Provisions.....	6
1.6.1 Professional Registration.....	7
1.7 ADDENDA.....	7
1.8 QUESTIONS FROM APPLICANTS.....	7
1.9 PROTESTS Solicitation Questions, Requests for Clarification or Change, and Protests.....	7
1.9.1 Selection Protests.....	8
1.10 INCURRED COSTS.....	8
1.11 EQUAL EMPLOYMENT COMPLIANCE REQUIREMENT; SEXUAL HARASSMENT.....	8
1.12 EQUITY AND DIVERSITY.....	9
1.13 PUBLIC RECORDS.....	9
<b>SECTION 2 - PROPOSAL REQUIREMENTS</b>	<b>10</b>
2.1 PROPOSAL SUBMISSION.....	10
2.2 EVALUATION CRITERIA.....	10
2.2.1 Design Team - 10 Points.....	10
2.2.2 Previous Experience – 30 points.....	10
2.2.3 Approach/ Methodologies - 25 points.....	11
2.2.4 Schedule - 10 Points.....	11
2.2.5 Budget - 10 Points.....	11
2.2.6 Proposal Completeness and Quality – 5 Points.....	11
2.2.7 Equity and Diversity – 10 Points.....	11
2.2.8 Optional Team Interview (FINALISTS ONLY) – 40 Points.....	12
2.2.9 References (FINALISTS ONLY) – 10 Points.....	12
<b>SECTION 3 - EVALUATION AND SELECTION PROCESS</b>	<b>13</b>
3.1 SELECTION COMMITTEE.....	13
3.2 EVALUATION CRITERIA.....	13
3.3 SELECTION PROCESS.....	13
<b>APPENDICES</b>	<b>14</b>
4.1 ARCHITECTURAL SERVICES AGREEMENT.....	14

## SECTION 1 - ADMINISTRATIVE INFORMATION

### 1.1 INTRODUCTION

Portland State University (PSU), a 50-acre campus located in downtown Portland, is a nationally acclaimed leader in sustainability and community-based learning. The University's position in the heart of Oregon's economic and cultural center enables PSU students and faculty to apply scholarly theory to the real-world problems of business and community organizations.

Portland State offers more than 220 undergraduate, master's, and doctoral degree options, as well as graduate certificates and continuing education programs. PSU is Oregon's largest and most diverse university, with some 30,000 students who come from all 50 states and from nearly 100 nations around the world.

A single library facility, the Millar Library ("Library"), serves the entire PSU community. Located between SW 10<sup>th</sup> Avenue and SW Park Avenue, the Millar Library sits just north of the Peter Stott Center and west of the City's South Park Blocks in the core of PSU's campus. It is a center for student academic activity and is one of the most heavily utilized buildings on campus.

The Library provides an extensive array of user-centered information services and resources and delivers a strong instruction program dedicated to improving students' academic success. The electronic collections, available at the Library's Web site, include thousands of academic library resources such as full text journal articles, books, and reference databases. The Library includes over 1.4 million print volumes. Lesser-used materials are housed at a leased 37,500 square foot off-site warehouse ("Library Warehouse") located several miles from campus. The Library provides collaborative study spaces and technology-enabled environments designed to enhance students' learning experiences, two library classrooms, group study rooms, practice presentation rooms, a media viewing room, and a family friendly study room.

The Library was built in two major phases. In 1968, Skidmore, Owings & Merrill designed the library as a rectangular structure oriented roughly north and south along the east side of 10th Avenue. The original building was designed to accommodate vertical expansion, but major renovation or expansion could trigger seismic retrofit upgrades to current code (See Geo-tech, FEMA study and current floor plans available at <http://www.fap.pdx.edu/floorplans/detail2.php?buildingID=2>). In 1989, an addition doubled the space of the Library, providing a combined-total of almost 136,000 assignable square feet. The addition provided a semi-circular glass façade five stories high that frames a magnificent 120-year-old copper beech tree recognized as a Heritage Tree by the City of Portland. The curved façade creates unique interior seating areas with views of the historic tree and the park beyond.

Since the 1989 addition was completed, significant interior renovations have occurred on the first, second and third floors and compact shelving systems have been added in the basement. Smaller cosmetic and furniture upgrades have also been completed in various locations throughout the building. The building has a significant amount of deferred maintenance and fire, life safety and code deficiencies.

The Library is currently undergoing two interior improvements:

- A 5,000 square foot renovation on the third floor will provide additional library seating.
- A 7,700 square foot renovation on the fourth floor of the Library that will create office space to allow library staff to unite in one location for the first time.

Construction of these projects is anticipated to be complete in Fall/Winter of 2013.

Although the two current projects will provide much needed improvements to the building, Millar Library, and all academic libraries, must also actively study and respond to technological and functional changes of the times. Millar Library's ability to meet these changes will be a critical in supporting PSU's vision to create a welcoming and stimulating environment that is conducive to success for students, faculty, and staff.

The proposed Space Plan and Feasibility Study ("Feasibility Study") must investigate the range of possible changes that will enable the Library to respond and adapt to changing pedagogy, library practices and student needs over the next 10 years and beyond. The Feasibility Study is intended to be a master plan for the building that will envision what the Library can be and how it can evolve over time through a series of strategic improvements. The Feasibility Study is not intended to focus on specific square footage assigned to any given function or to programming of the library. The Library Feasibility Study will provide diagrammatical solutions that identify the highest and best functions for the Library and the locations and adjacencies for the function within the constraints of the current building design.

The Feasibility Study will provide three (3) Conceptual Design Studies, including block stacking diagrams and a strategy for phased construction of the plan over the next ten years. A preferred stacking plan, a prioritized project list, and a phased construction approach will then be further developed and refined into a Final Strategic Plan that will serve as a guide for the Library as they consider future building moves and renovations.

The Oregon State Board of Higher Education ("OSBHE") on behalf of the PSU is seeking architectural services firm and/or team with significant experience in library space planning and renovation to perform programming and spatial planning, and to examine the feasibility and options for accommodating the changing needs balanced with the existing services of the Library. Firms and/or teams must have extensive higher education library experience, including recent experience with library programming, weighing tradeoffs between traditional library functions and new functions given changing technology and library use and experience with estimating construction costs for interior and exterior building renovations. Firms and/or teams are expected to bring national knowledge of higher education trends in library use and design and ideas about how these trends could apply to PSU.

The RFP and selection process is provided in the Oregon University System (OUS) Oregon Administrative Rules for Professional Consultants, 580-063-0025 and Chapter 580 Division 061.

This Request for Proposals ("RFP") does not commit the Oregon State Board of Higher Education (OSBHE) or PSU to enter into any agreement, to pay any expenses incurred in preparation of any response to this RFP, or to procure or contract for any supplies, goods or services. PSU reserves the right without liability to OSBHE or PSU, to cancel this RFP and to reject any proposal that does not comply with this RFP or applicable administrative rules, and to reject any and all responses received as a result of this RFP upon a finding that it is in the public interest to do so.

A sample copy of the Architectural Services Agreement is attached to this RFP (Appendix 4.1). PSU will enter into negotiations with the selected firm to determine final scope and description of services, schedule and cost and, if the negotiations are successful, will enter into an Architectural Services Agreement similar to the attached sample agreement. The sample agreement attached to this RFP is subject to change by PSU. All Proposers must identify in their proposal any terms and conditions that they wish to negotiate. Failure to identify those terms they wish to negotiate may result in termination of negotiation with the selected firm.

If the negotiations are not successful, PSU reserves the right to enter into negotiations with another firm from among the remaining firms interviewed.

## **1.2 SCOPE OF WORK**

At minimum, the scope of services must include a Kick-off Meeting, Existing Conditions Review, a Future Scenarios Analysis, Conceptual Design Studies, an Order of Magnitude Cost Estimates and Operating Budgets, a Refined Preferred Recommendation, and a Final Strategic Plan.

Proposers are encouraged to make recommendations and revisions to the scope of work based on Proposers practical experience in library design, space planning and feasibility studies.

**No billable work can proceed prior to negotiation and execution of the Retainer Contract Supplement and the Consultants receipt of a Notice to Proceed.**

### **1.2.1 KICK-OFF MEETING**

Following release of the Notice Proceed, the selected Consultant must convene a project kick-off meeting. The agenda for the meeting must include a review of the contract administration requirements, the confirmation of the project scope of work, the approval of a project schedule, and a review of the project delivery process. *Deliverables: Meeting agenda, team meeting summary, project scoping document, project schedule.*

### **1.2.2 REVIEW OF EXISTING CONDITIONS**

A review of existing conditions is, at minimum, expected to include touring the Millar Library, the Library Warehouse, adjacent PSU spaces, a study of the building common circulation areas (specifically the front entry), and a review of the success of the current library functions and services, PSU will provide the design team with information regarding the current library spatial organization and utilization. The design team is to collect, analyze and integrate other university data into the current conditions assessment, including the university's deferred maintenance, floor and load bearing capacity and seismic conditions reports. The review of existing conditions and proposed program may generate the need for the design team to collect further information for design synthesis. *Deliverables: Existing conditions survey, building use study, circulation survey, front entry study, ranked list of current of functions and services.*

### **1.2.3 UNIVERSITY LIBRARY BEST PRACTICES**

Provide experience based examples of current trends in university libraries for institutions similar to PSU, including written descriptions of trends in library space planning as well as photo and plan examples of recently completed or renovated libraries. This task is not intended to be an exhaustive research project, rather proposers are expected to have this information readily available based on past experience. *Deliverables: Memorandum of current trends in library space planning.*

### **1.2.4 FUTURE SCENARIO DEVELOPMENT**

The purpose of this task is to create three future scenarios for Library use based on discussions with Library stakeholders, best practices and PSU needs. The scenarios will include a range of potential future visions for the Library and how future improvements could implement the future scenarios. This task will also establish spatial programming criteria to evaluate the scenarios and conceptual design studies. The scenarios must provide a rational methodology and determine the areas for the existing and new program spaces. Explore opportunities to improve current spatial efficiency while integrating additional

program elements. The scenarios must provide a complete programmatic inventory of required space and adjacencies. The scenarios must present alternatives for accommodating new and expanded program elements, including an area for Special Collections, modifying the front entry, a variety of solo and collaborative student study spaces, and accommodating space for a variety of library functions and administrative needs. PSU is to approve the required adjacencies and program prior to beginning conceptual design. During this task the Consultant Team is expected to interview up to 15 Library stakeholders to help design the scenarios. *Deliverables: Future Scenario Development including, criteria and methodology summary, adjacency diagrams, space inventory (current and recommended) Summary of stakeholder interviews.*

#### **1.2.5 CONCEPTUAL DESIGN STUDIES AND PHASED CONSTRUCTION APPROACH**

Based on stakeholder input and analysis determine the preferred scenario and prepare and present at least three alternative design concepts for achieving the preferred scenario within the constraints of the Library's unique design, including a phased construction approach for each of the designs. The alternative design concepts must, at a minimum, explore options to meet technological and functional changes, to maximize space utilization and efficiencies, to eliminate space inadequacies, and to improve the overall experience of the Library. The studies must allow PSU to test potential program element combinations and layouts. Create a matrix of the pros and cons of each design concept, including how each concept serves more students and also better serves students, as well as faculty and the PSU community. *Deliverables: Code review, 3 alternative design concepts, including block stacking diagrams, schematics, and phased construction approach, design pros and cons matrix.*

#### **1.2.6 ORDER OF MAGNITUDE COST ESTIMATES & IMPACTS TO OPERATING BUDGETS**

In collaboration with PSU, provide a conceptual level estimate of probable cost for the preferred design concepts, including order of magnitude cost estimates and impacts, if any, to the Library's current operating budget. *Deliverables: Cost and operating budget estimates for each of the three alternative design concepts.*

#### **1.2.7 REFINEMENT OF PREFERRED RECOMMENDATION**

Based on feedback from PSU on the alternative design concepts, develop a preferred recommendation. The design concept preferred by PSU may be one of the three alternative design concepts, or a new design concept merging elements from the previous Conceptual Design Studies. It must include a stacking plan that clearly details recommended spatial changes in the existing Library and areas of expansion, refinement of the cost estimate and operating budget, and a phased approach to work, including prioritized recommendations for immediate, short, and long-term projects and improvements. The report is not expected to include design development, construction documents, or highly detailed construction estimating. *Deliverables: Recommendation of preferred design concepts, preferred design concept, stacking plan, refined cost and operating budget estimate, phasing work analysis.*

#### **1.2.8 SUBMITTAL OF THE FINAL STUDY**

The final Space Planning and Feasibility Study and Strategic Plan document must clearly articulate the participants, purpose, process, methodologies and recommendation. Include an Executive Summary that summarizes key findings and recommendations. In the body of the report or appendices, include, team meeting summaries, plans and data of current conditions, code information, established programming criteria and needs, spatial program, evaluated design studies and the preferred plan recommendation, prioritized list of improvements and cost estimates. The report must include

architectural renderings of any significant improvements that could be used in fund raising documents.  
*Deliverables: Strategic Plan, including Executive Summary and project deliverables.*

Distribute one (1) Portable Document Format (PDF) electronic copy of the full final accepted study to each PSU member of the project team, along with clear JPEG formatted files of all photographs, illustrations and images incorporated into the study. Provide five (5) 8 ½" x 11" bound copies of the final study accepted by PSU along with all project close-out documentation required under the Agreement.

### **1.3 SELECTION PROCEDURE AND ANTICIPATED TIMETABLE**

The selection procedure is intended to evaluate the capabilities of interested architectural firms to provide services to PSU for this project. The Selection Committee will numerically evaluate the responses to the RFP. On the basis of this evaluation, the highest scoring firm may be directly awarded the project or top firms may be selected for final consideration through interviews and further investigation of references.

Following the interviews, a notice of intent to award to the apparent successful Proposer shall be issued.

#### **RFP schedule is as follows:**

October 28, 2013	Advertisement of Request for Proposals
November 7, 2013 @ 5:00 pm	Questions from Applicants and Solicitation Protests due
November 18, 2013	Final Addendum shall be issued by this date
<b>November 25, 2013 @ 5:00 pm</b>	<b>Proposals Due</b>

#### **Tentative RFP Review schedule (subject to change)**

November 27, 2013	Notice of Intent to Award or Notification of finalists
December 4-5, 2013	Finalist interviews if necessary (please hold these dates as finalists will be assigned a time on one of these three days.)
December 13, 2013	Notice of Intent to Award issued to apparent successful Proposer
December 30, 2013 @ 5:00 pm	Selection Protest deadline
January 17, 2014	PSU finalizes Agreement

#### **Milestones:**

January 21, 2014	Project Kick-Off Meeting
October 31, 2014	Project Completion

### **1.4 RESPONSE**

To be considered for selection, written Proposals must arrive at Portland State University, Contracting and Procurement Services by the date specified in Section 1.3. Delivery is recommended. Applicants who mail packages should allow ample delivery time to ensure timely arrival. The address is:

FOR DELIVERY:  
Portland State University  
Contracting and Procurement Services  
Attn: Cate Antisdell  
ML Space Planning Feasibility Study RFP  
1600 SW Fourth Avenue, Suite 260  
Portland OR 77201

FOR MAIL: (Not Recommended)  
Portland State University  
Contracting and Procurement Services  
Attn: Cate Antisdell  
ML Space Planning Feasibility Study RFP  
PO Box 751, Mail Stop: FAST-CAPS  
Portland OR 97207-0751

**It is the sole responsibility of the Proposer to ensure timely delivery. Late Proposals shall not be considered.**

**Proposals will not be accepted at any other PSU location other than the address specified above.  
FAXED OR EMAILED PROPOSALS WILL NOT BE ACCEPTED**

Applicants selected may be requested to provide additional information, either informally or via the interview process, to clarify their proposals and to ensure mutual understanding of the scope of the work requirements and schedule.

## **1.5 RESERVED**

## **1.6 INSURANCE AND LICENSURE REQUIREMENTS**

### **Insurance Provisions**

During the term of the Agreement, Architect shall maintain in full force, at its own expense, from companies licensed to do business in Oregon, insurances as noted below:

- A. **Workers Compensation** - Architect, its consultants, if any and all employers working under the Agreement and supplements hereto are subject employers under the Oregon Workers' Compensation Law and shall comply with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers.
- B. **General Liability** - Architect shall obtain, at the Architect's expense, and keep in effect during the term of this Agreement, Commercial General Liability Insurance covering bodily injury and property damage in a form and with coverages that are satisfactory to the Owner. This insurance shall include personal injury liability, products and completed operations, and contractual liability coverage for the indemnity provided under the Agreement, and is made on an occurrence basis. Combined single limit per occurrence shall not be less than \$1,000,000 each occurrence/\$2,000,000 annual aggregate.
- C. **Automobile Liability** - Architect shall obtain, at Architect's expense, and keep in effect during the term of this Agreement, Automobile Liability Insurance covering owned, non-owned and hired vehicles, as applicable. The coverage may be written in combination with the Commercial General Liability Insurance. Architect shall provide proof of insurance to Owner of not less than the following amounts: \$1,000,000 each occurrence.
- D. **Professional Liability** - Architect shall provide Owner with proof of coverage for Professional Liability/Errors & Omissions insurance covering any damages caused by any negligent error, omission, or any act for the Project, its drawings and project manual, and all related work products of Architect, as it pertains to architectural services services provided under the Agreement. The policy may be either a practice based policy or a policy pertaining to the specific Project. Professional Liability insurance to be provided shall have a combined single limit of not less than \$1,000,000 per claim, \$2,000,000 aggregate.

If any of the required liability insurance is arranged on a "claims made" basis, "tail" coverage will be required at the completion of the agreement for a duration of a minimum of 6 years.



Architect will be responsible for furnishing certification of "tail" coverage as described or continuous "claims made" liability coverage for a minimum of 6 years following completion. Continuous "claims made" coverage will be acceptable in lieu of "tail" coverage, provided its retroactive date is on or before the effective date of the Agreement. This will be a condition of the Final Acceptance of Work or Services and Related Warranty, if any.

Architect shall furnish to the Owner, Certificates of Insurance as evidence of the insurance coverages required under the Agreement. The certificate(s) shall provide that the insurance company or companies shall give a 30 calendar day notice (without reservation) to Owner if the insurance is canceled or changed. The certificate(s) should state specifically that the insurance is provided for the Agreement or Amendments thereto.

The Certificates of Insurance, except for Workers' Compensation and Professional Liability, shall provide that the Owner, and its institutions, officers and employees are Additional Insureds with respect to the Architect's services to be provided under the Agreement. Architect shall provide Owner with copies of all policy endorsements/amendments confirming the State of Oregon and Owner's status as Additional Insureds, as required by the Agreement. The requirements of this Section shall also apply to policies for insurance coverage provided by sub-consultants of Architect.

#### **1.6.1 Professional Registration**

The Architect and all firms providing Professional Architectural services shall be currently licensed to practice in each firm's area of professional expertise in the State of Oregon, and shall comply with all State of Oregon Architect licensure requirements.

### **1.7 ADDENDA**

Although PSU encourages an open proposal process, prospective proposers need to be aware that the RFP will be modified only by documents issued as addenda by PSU. No other direction or comments received by proposers, written or oral, will serve to change the RFP.

### **1.8 QUESTIONS FROM APPLICANTS**

Questions and requests for clarifications or changes from applicants regarding this RFP must be received in writing via email no later than the date specified in Section 1.3 and shall be directed to the Contracting and Procurement Services department at: [proposals@pdx.edu](mailto:proposals@pdx.edu).

All questions and requests that are timely received will be answered via addenda to the RFP. Other information and responses, written or oral, which are not contained in official written addenda to the RFP from PSU or any other source, are not binding on PSU. The final addenda, if any, will be released no later than the date specified in Section 1.3. Applicants are encouraged to call to check on the status of such addenda prior to submission of their Written Proposals.

### **1.9 PROTESTS**

#### **Solicitation Questions, Requests for Clarification or Change, and Protests**

Prospective respondents may submit questions, requests for clarification, or requests for change or protest of particular solicitation provisions and specifications and conditions, (including the terms of the sample Architectural Services Agreement, Appendix 4.1) by e-mail to [proposals@pdx.edu](mailto:proposals@pdx.edu).

These must be in writing and must be received by PSU prior to the date specified in Section 1.3. Such requests for clarification or change must include the reasons for the request and any proposed changes to the solicitation provisions and specifications and conditions. Protests must fully specify the grounds for the protest and include all evidence that the protestor wishes PSU to consider and must otherwise comply with OAR 580-061-0145.

Questions and requests for clarification and change that are timely received will be answered via addenda. Protests will be answered directly with the protesting Proposer. Any changes arising from questions, requests for change or protests will be made only via addenda to the RFP. Responses from PSU not contained in an official addendum to the RFP are not binding on PSU. Proposers are encouraged to check on the status of such addenda prior to submission of their Proposals.

### **1.9.1 Selection Protests**

Any Applicant who responds to the RFP and claims to have been adversely affected or aggrieved by the selection of competing Applicants shall have the opportunity to submit a written protest to the address below. Protests must fully specify the grounds for the protest and include all evidence that the protestor wishes PSU to consider and must otherwise comply with OAR 580-061-0145.

#### **FOR DELIVERY:**

Portland State University  
Contracting and Procurement Services  
Attn: Darin Matthews  
PROTEST - ML Space Planning Study RFP  
1600 SW Fourth Avenue, Suite 260  
Portland OR 77201

#### **FOR MAIL: (Not Recommended)**

Portland State University  
Contracting and Procurement Services  
Attn: Darin Matthews  
PROTEST - ML Space Planning Study RFP  
PO Box 751, Mail Stop: FAST-CAPS  
Portland OR 97207-0751

The written protest must be received by the date and time specified in Section 1.3. All protests will be answered directly with the Proposer.

### **1.10 INCURRED COSTS**

Portland State University is not liable for any costs incurred by the Architect in the preparation or presentation of their proposals.

**No billable work can proceed prior to negotiation and execution of an Architectural Services Agreement and the Consultants receipt of a Notice to Proceed.**

### **1.11 EQUAL EMPLOYMENT COMPLIANCE REQUIREMENT; SEXUAL HARASSMENT**

By submitting a proposal package, the proposer certifies conformance to the applicable federal, state and local laws, acts, executive orders, statutes, administrative rules, regulations, ordinance and related court rulings concerning Affirmative Action toward Equal Employment Opportunities. All information and reports required by the Federal or Oregon State or local Governments, having responsibility for the enforcement of the foregoing, shall be supplied to PSU upon request for purposes of investigation to ascertain compliance with the foregoing.

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 580-061-0040, proposers are hereby notified that the OSBHE has adopted policies applicable to consultants and contractors that prohibit sexual harassment and that proposers and their employees are required to adhere to PSU's policy prohibiting sexual harassment in their interactions with members of PSU's community.

#### **1.12 EQUITY AND DIVERSITY**

PSU is committed to ensuring equity and diversity in its procurement and contracting process and increasing opportunities for Minority, Women and Emerging Small Businesses (MWESB). Therefore, PSU strongly encourages its consultants to utilize MWESB firms in providing services and materials for PSU contracts and projects.

#### **1.13 PUBLIC RECORDS**

PSU will keep this RFP and one copy of each original proposal received in response to it, together with copies of all documents pertaining to the award of any contract, as part of file or record that is open to public inspection . If a proposal contains any information that constitutes a trade secret under ORS 192.501(2), each sheet containing a trade secret must be marked with the following legend: "This data constitutes a trade secret under ORS 192.501(2), and shall 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 may apply "unless the public interest requires disclosure in the particular instance." (ORS 192.501.) Therefore, non-disclosure of documents or any portion of a document submitted as part of a proposal may depend upon official or judicial determinations made pursuant to the Public Records Law. These restrictions may not include cost or price information.

**END OF SECTION 1**

## SECTION 2 - PROPOSAL REQUIREMENTS

### 2.1 PROPOSAL SUBMISSION

Submission must include:

1. One (1) CD containing a PDF (Portable Document Format) version of the written proposal.
2. Seven (7) paper copies of the proposal.

Proposals must:

1. Include responses to the requested information in Section 2.2.
2. Include name, address, email and phone number for the main proposal contact person.
3. Include page numbers and firm name on each page.
4. Respond with information in the same order and headings as in Section 2.2.
5. Not include references to on-line work or QR scan codes.
6. Not exceed ten (10) double-sided 8 ½" x 11" pages in length for a total of twenty (20) pages including covers or letters but not including the bid form or bid security. Ledger size 11"x17" pages may be used. Each side of an 11"x17" page counts as two (2) pages. Page count includes *all* sheets submitted except for a blank page. If proposal exceeds the page limit, only the allowed number of pages will be considered starting with the first page.
7. Be in a font size of 10 point or larger.
8. Be stapled in the corner and printed on recycled paper.

At the Owner's sole discretion, incomplete proposals may not be considered.

### 2.2 EVALUATION CRITERIA

#### 2.2.1 Design Team - 10 Points

- List the makeup of your design team, including the names and addresses of consulting design and support firms.
- Describe each team member that will work on the project including; their role, responsibilities, years with the firm, and a list of similar projects they have worked on and their experience with university library projects.
- Indicate who in your team will be the primary contact person for the Owner.

The Selection Committee will be looking for the experience level and background of the team members that will work on the project and the degree to which their previous experience demonstrates the ability to provide the services in a professional and timely manner.

#### 2.2.2 Previous Experience – 30 points

- Provide descriptions of no more than three (3) similar recent studies, which have been completed by the team, include at least one (1) study that the consulting design and support firms were part of the team. Previous experience must include university library work.
- Clearly demonstrate the experience of the team in the spatial planning of university library facilities.

- Demonstrate the experience of the team in preparation of planning and feasibility studies, including architectural renderings. Demonstrate the ability to communicate complex ideas to a broad audience.

The Selection Committee will be looking for the experience level of the team members working together with clients to successfully deliver feasible design solutions.

### **2.2.3 Approach/ Methodologies - 25 points**

- Describe your philosophy to Owner involvement in project delivery.
- Explain your approach and methodology for current condition assessment, needs analysis and synthesizing options into a concise, compelling and feasible project recommendation.
- Describe any changes or innovations the team would bring to this project and explain how your previous experience has influenced your approach.

### **2.2.4 Schedule - 10 Points**

- Briefly describe how your team must accomplish the project within the Owners' timetable.
- Provide a project schedule that includes details on your approach and methodologies for completing the project and the required deliverables.

### **2.2.5 Budget - 10 Points**

There is an initial budget of \$65,000 for this scope of work. Explain the techniques your team will use to manage the budget and control costs.

### **2.2.6 Proposal Completeness and Quality – 5 Points**

Scoring is based on overall quality of the proposal and compliance with the requirements of the RFP.

### **2.2.7 Equity and Diversity – 10 Points**

PSU is committed to increasing contract opportunities for Minority, Women and Emerging Small Businesses (MWESB). PSU is seeking qualified firms that demonstrate a commitment to diversity in the workforce and in its contracting practices.

**MWESB utilization:** List State of Oregon MWESB certification numbers for your company or any MWESB subcontractors, partners, or suppliers that you will utilize on this Project team, as well as any self-identified firms. Please include their specific role on the Project and give the anticipated percentage of MWESB utilization on Project. Substitutions of these subcontractors or suppliers after award of the contract shall require PSU approval. The selected contractor will be required to report actual utilization to PSU.

Provide examples of your firm's past performance with regards to MWESB utilization and subcontracting plans. Please include number and dollar amount of subcontracts awarded, and any utilization percentages or other performance indicators. (5 points)

**Workforce diversity and community involvement:** State your firms' nondiscrimination policies and practices, hiring strategies, workforce diversity plans, and outreach plans that ensure a diverse

workforce. Include the diversity of your current workforce and what steps are taken to provide employment and promotional opportunities for women and minorities. Include any community activities that promote workforce diversity, such as job fairs and youth outreach events. (5 points)

**2.2.8 Optional Team Interview (FINALISTS ONLY) – 40 Points**

- At the sole discretion of the Owner, team interviews may be conducted to allow the highest scoring proposers to expand on each of the above categories.
- **In the event that team interviews are conducted, at a minimum, a representative from all key sub consultants, and the primary contact with the Owner are required.**

**2.2.9 References (FINALISTS ONLY) – 10 Points**

- List three (3) clients for whom you (the proposer) and each of the sub-consultants have provided similar services in the past three (3) years. These references should have had direct contact with the primary staff proposed on the project.
- Provide a brief scope of work for each project. These may be the same projects provided in the initial written proposal.
- Provide the contact person's name, relationship to the project, current phone number and e-mail address.

**END OF SECTION 2**

## SECTION 3 - EVALUATION AND SELECTION PROCESS

### **3.1 SELECTION COMMITTEE**

Proposals will be evaluated by qualified reviewers as designated in 3.2. Committee members will not be announced prior to interviews.

### **3.2 EVALUATION CRITERIA**

The evaluation criteria and maximum allowable points to be used in the evaluation process are as stated in Section 2.2.

<b>Item</b>	<b>Criteria and Points</b>	<b>Evaluated By</b>
2.2.1	Design Team - 10 Points	Selection Committee
2.2.2	Previous Experience – 30 points	Selection Committee
2.2.3	Approach/ Methodologies - 25 points	Selection Committee
2.2.4	Schedule - 10 Points	Selection Committee
2.2.5	Budget - 10 Points	Selection Committee
2.2.6	Proposal Completeness and Quality – 5 Points	Selection Committee
2.2.7	Equity and Diversity – 10 Points	MWESB Committee

**Total possible points - Written Proposal Evaluation Phase – 100 points**

2.2.8	Optional Team Interview (FINALISTS ONLY) – 40 Points	Selection Committee
2.2.9	References (FINALISTS ONLY) – 10 Points	Selection Committee Designee

**Total possible points – Finalist Evaluation Phase – 50 points**

**Total possible– 150 points**

### **3.3 SELECTION PROCESS**

The proposal packages will be evaluated as follows:

- A. Review for inclusion of all elements specified in Proposal Requirements Section 2. Any proposals which do not include all required elements may be rejected as non-responsive at Owner’s discretion.
- B. Total preliminary point ratings will be assigned to the proposal packages using the criteria specified in Section 2.2, items 2.2.1 through 2.2.7.
- C. At Owner’s sole discretion the proposers submitting the proposal packages who receive the highest point totals, may be invited to an interview with the Selection Committee. Should interviews occur, points will be assigned using the criteria specified in Section 2.2, item 2.2.8.
- D. At this point, references may be checked and scored for interviewed firms at the Committee’s discretion. Points will be assigned using the criteria specified in Section 2.2, item 2.2.9.
- E. A Notice of Intent to Award shall be issued to the proposer with the most cumulative total points (Section 2.2, items 2.2.1 through 2.2.9).

**END OF SECTION 3**

## APPENDICES

### 4.1 ARCHITECTURAL SERVICES AGREEMENT