

OREGON STATE UNIVERSITY

REQUEST FOR PROPOSALS

Space Improvement Program

CONTRACT ADMINISTRATOR: Oregon State University
Debera Massahos
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ISSUE DATE: January 28, 2014
RFP CLOSING (DUE) DATE: February 4, 2014, 4:00 PM, Local Time

NO LATE RESPONSES WILL BE ACCEPTED

SUBMITTAL LOCATION

Oregon State University
Capital Projects Contract Administration
Attention: Debera Massahos
3015 SW Western Blvd.
Corvallis, OR 97333

Introduction:

Oregon State University seeks proposals from consulting firms to provide space and architectural programming and coordination services for relocating multiple units throughout OSU's Corvallis campus. Due to a surge of new construction, renovations and purchases of off-campus buildings, as many as 40 OSU units and hundreds of OSU staff will be relocated temporarily or permanently. These relocations will take place over the next two years with many taking place in the summer of 2014.

Project Description:

The successful consulting firm will provide space and architectural programming for short-term, mid-term and long-term college and unit needs and will be responsible for creating, updating, budgeting and communicating a Relocation Plan that will accommodate the affected units and meet the overall needs of OSU.

For each unit affected by the Relocation Plan, the consulting firm will:

- Assess each unit's space and program requirements through meetings and interviews with the unit as deemed necessary by a designated departmental liaison, inspection of existing space and review of OSU standards and space information.
- Evaluate prospective space for meeting the unit's needs and assist OSU staff in identifying and proposing alternative space if prospective space is inadequate.
- Assist the unit in planning for the use of the space, locating personnel and tangible assets.
- Recommend modifications, repairs and improvements to prospective space. Convey space modification requirements to architectural design firms and/or contractors as required. Serve as the owner's representative to design firms and contractors.
- Create a Memorandum of Understanding (MOU) detailing the specifics of the scope, allocation of responsibilities and financial obligations for each relocation for unit and Capital Planning and Development approval.
- Provide unit relocation coordination, assuring required steps and tasks are completed in a timely manner. Task include, but are not limited to:
 - Furniture moves and arrangement in new location
 - New furniture selection and purchasing (through Capital Planning and Development) if required
 - Hazardous or special material relocation (through OSU Environmental Health and Safety)
 - Fragile or sensitive materials and equipment relocation
 - Disposal of unwanted furniture and other items via OSU Surplus or other means
 - Voice and data connections
 - Office equipment relocation and set up, such as copiers, printers, faxes, computers
 - Rekeying door locks (through OSU Key Shop)
- Provide scope of moving services to Capital Planning and Development to facilitate procurement, review proposals and coordinate relocations
- Provide schedules and regular updates to the units
- Provide moving-day assistance and coordination. OSU anticipates that some moves may require the coordination of outside trade contractors and multiple OSU units, such as Environmental Health and Safety and Network Services.

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 580-063-0020, 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.

Response 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. Include an organizational chart. List the projects your firm is currently contracted for and at what stage you are in terms of completion. (10)
2. Describe your firm's recent (past five years) experience with similar projects and indicate specific personnel assigned to the projects. (20)
3. Identify the personnel in your firm who would be assigned to the project and their previous experience in projects of similar scope, including project experience and capability. Confirm the availability of proposed team members for the duration of the project and the proposed percentage of involvement. Describe your experience with expediting projects with aggressive schedules and your capabilities to plan and coordinate relocations of personnel and physical assets. (40)
4. Describe your firm's project management strategies for this project. Describe your firm's communication style and your communication plan. (20)
5. **Workforce Diversity Plan**
Provide a description and identification of Minority Business Enterprise (MBE), Women Business Enterprise (WBE) or Emerging Small Business (ESB) certifications for the Proposer and a description of the Proposer's nondiscrimination practices. Provide any historical information on MBE, WBE or ESB Joint Ventures, subcontracting or mentoring plan, and utilization history for projects completed within the past three (3) years.

Provide a narrative description of your current workforce diversity program/plan, and the plan for obtaining subcontracting and consulting diversity for this project. Include a description of the outreach program or plan, including a schedule of events and specific steps that will be taken to maximize broad based and inclusive participation and the plan to provide mentoring, technical or other business development services to subcontractors needing or requesting such services.

The successful proposer shall perform the work and the contract with respect to diversity according to the means and methods described in its workforce plan described in the

proposal, unless changes are requested and approved in writing in advance by OSU or are required by applicable laws, ordinances, codes, regulations, rules or standards. (10)

6. 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. 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. (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.

January 28, 2014	Issue RFP
February 4, 2014, 4:00 PM	RFP response due
February 12, 2014	Notification of finalists
February 17, 2014	Telephonic Interviews with finalists
February 19, 2014	Tentative Selection/Notification

Evaluation Process:

This RFP will use a two-step process to select a consulting firm for this Project. The first step includes evaluation of written proposals submitted in response to this RFP and then short-listing of three firms, who will be invited to participate in the second step, a telephonic interview that is anticipated to be scheduled on **February 17, 2014, between 1:00 and 4:00 PST**. Please hold this date for tentative interview.

Each of the evaluation criteria has been assigned a weight of between 10 and 40. 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 finalists for interviews will be selected for step two of the process.

Interviews will include a 25-minute presentation period to allow the proposers to highlight their proposal as well as respond to additional questions or information requested in advance by the evaluation committee, and then a separate 20-minute Q&A session. OSU will use the information presented during the interview to further evaluate the proposer's qualifications and abilities and develop a tentative ranking. The evaluation committee may then check references and adjust the scores based on the results of reference checks to determine the final ranking of proposals.

After all of the interviews and committee discussions are completed, the evaluation committee will select the Apparent Successful Proposer by ranking the proposals based on all information received, presented, found and heard. OSU will then send out a Tentative Selection/Notification and the Apparent Successful Proposer will submit its fee proposal within five days of the Tentative Selection/Notification. OSU will then negotiate with the Apparent Successful Proposer to finalize the price and specific statement of work of a contract, consistent with OSU's Standard Architect's Agreement 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 **four (4)** copies of your written proposal, to be received by the closing date and time listed in this document to:

Debera Massahos
Oregon State University
3015 SW Western Blvd.
Corvallis OR 97331
Phone : 541-737-7694 FAX : 541-737-4810
email : debera.massahos@oregonstate.edu

Your proposal must be contained in a document **not to exceed seven (7) single sided pages**, including pictures, charts, graphs, tables and text the proposer deems appropriate to be part of the review of the proposer's response. Resumes of key individuals proposed to be involved in this project are exempted from the 7-page limit and should be **appended to the end of your response**. No supplemental information to the 7 page proposal will be allowed. Appended resumes of the proposed key individuals, along with a transmittal letter, table of contents, front and back covers, and blank section/numerical dividers, etc., will not be counted in the 7 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 one inch) margins.

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

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

Please note that 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 proposals 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 Debera Massahos 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 Debera Massahos electronically at debera.massahos@oregonstate.edu or at 3015 SW Western Blvd, Corvallis OR 97331. Requests and protests must be received no later than 10:00 a.m., January 31, 2014. 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 Debera Massahos 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 Debera Massahos electronically at debera.massahos@oregonstate.edu or at 3015 SW Western Blvd, Corvallis OR 97331 within five days after notification of that selection. Any such protests must be received by Ms. Massahos 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 Debera Massahos via email.

Proprietary Information:

OSU will retain this RFP and one 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 reserves the right to terminate the project and the agreement, at any time, upon ten days' written notice.

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 OUS Retainer Supplement.

Enclosures:

Sample Retainer Consulting Services Supplement

End of RFP