

OREGON STATE UNIVERSITY

REQUEST FOR PROPOSALS

Johnson Hall Commissioning

CONTRACT ADMINISTRATOR: Oregon State University

Heather M. Cooney, CPPB
Construction Contract Officer

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ISSUE DATE: May 5, 2014

RFP CLOSING (DUE) DATE: May 22, 2014, 2:00 PM, Local Time

NO LATE RESPONSES WILL BE ACCEPTED

SUBMITTAL LOCATION

Oregon State University
Capital Projects Contract Administration
Attention: Heather Cooney
Construction Contract Officer
3015 SW Western Blvd.
Corvallis OR 97333

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 new Johnson Hall building on the OSU Campus, which 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.

Johnson Hall will be located on OSU's main campus in Corvallis, Oregon. The estimated direct construction budget for the Project is \$28 million. The project scope includes the construction of a new 62,000 square-foot building for the School of Chemical, Biological and Environmental Engineering. The building will contain research laboratories, classrooms, study and meeting spaces, and administrative offices.

Construction is anticipated to begin January, 2015. The project (and associated commissioning) must be completed by April, 2016. SRG Partnership is the project Architect, PAE is providing mechanical and electrical engineering, and Hoffman Construction is the 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.leedbuilding.org) and (d) The HVAC Commissioning Process, most recent ASHRAE Standards & Guidelines.

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 the Contract to be awarded. 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.

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 near the end of 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 has 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% DD, 50% CD and 90% CD.

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 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.

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 Retainer Contract Supplement attached as an exhibit to this RFP.

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 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 what stage you are in terms of completion. (Weight: 15)
2. Experience working with higher education institutions, with a focus on the Pacific Northwest. (Weight: 5)
3. Local experience over the past five years on projects of similar size and scope. 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)

4. 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 contact information (including email) for each identified key person. (Weight: 20)
5. Identify any sub-consultants and the key personnel of the sub-consultants that you propose to use on this project. Describe their recent (past 5 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)
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 response as an appendix and as such will not count toward the 25 page limit.** (Weight: 20)
7. 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 the Proposer's current workforce diversity program/plan, and the plan for obtaining subcontracting, consulting, and supplier 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 Proposer shall perform the Work and the Contract with respect to diversity according to the means and methods described in Proposer's 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. (Weight: 20)

8. Provide the names, addresses and phone numbers of three owners and three architects to be used as references for this project. These references should be from projects that have relevance to the project identified in this solicitation. 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. (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.

May 5, 2014	Issue RFP
May 22, 2014, 2:00 PM	RFP response due
Week of May 26, 2014	Firm Selection & Notification

Evaluation Process:

This Request for Proposals (RFP) is a single-step process in the selection of a Commissioning Agent for this Project. The selection committee will score each submittal on the basis of responses to the evaluation criteria. Submittals will be rated based upon the weights assigned to each item as noted in the parentheses at the end of the categories.

Each criterion has been assigned a weight between 0 and 25. Each member of the evaluation committee will rank each firm in each category between 0 and 5, and multiply that number by the weight assigned to the criterion. The committee members will then total the weighted score from all of the criteria to obtain the total score. The result of this total proposal score will be used to rank all respondents.

The RFP requires reference information for your firm. OSU will use this information and any other independently obtained references that can provide background on the firm. This information will not be separately scored, but results obtained from these and/or other reference checks will be used in evaluating and scoring the other criteria and in the final ranking.

The evaluation committee will meet and use the individual evaluation committee member rankings as a beginning of their discussion. The discussion of the responses will include firm strengths and weaknesses and the committee member scorings. After all of the committee discussions are completed, the evaluation committee will select the Apparent Successful Proposer by ranking the proposers based on all information received, found, and heard. OSU will then negotiate with the Apparent Successful Proposer the price and specific statement of work of a contract, based on the OSU Retainer 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 **Four (4)** 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:

Heather M. Cooney, CPPB
Capital Projects Contract Administration
Oregon State University
3015 SW Western Blvd.
Corvallis OR 97333
Phone : 541-737-9635 FAX : 541-737-4810
email : heather.cooney@oregonstate.edu

Your proposal must be contained in a document **not to exceed twenty-five (25) 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 and the firm's sample commissioning report are exempted from the 25-page limit and should be **appended to the end of your response**. No supplemental information to the 25-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 25-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 Heather Cooney 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 Ms. Cooney at the address, email or fax listed in this document. Requests and protests must be received no later than 2:00 p.m., May 9, 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 Heather Cooney 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 at the Capital Projects Contract Administration address given in the RFP 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 Heather Cooney 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 is seeking to award a consultant's agreement to a commissioning firm for the Project; however, OSU reserves the right to terminate the project and the agreement, 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 OUS Retainer Supplement.

Enclosures:

OSU Standard Retainer Supplement

End of RFP