

SCHOOL OF BUSINESS ADMINISTRATION EXPANSION AND RENOVATION

Solicitation #1524

Request for Proposals
Commissioning Services



Portland State
UNIVERSITY

June 6, 2014

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SECTION 1 - ADMINISTRATIVE INFORMATION

1.1 INTRODUCTION

Portland State University is proposing to expand and renew its existing home for the School of Business Administration, one of its most important academic programs, to accommodate its growth over the last 10 years, its growing array of programs and its critical ties to the regional business community. The current facility is located on Harrison Street and 6th Avenue. By locating an expansion on the existing SBA site and reusing the existing structure, the new facility will be particularly symbolic of the School's international prominence in sustainability.

The ethic supporting the mission of Portland State's School of Business Administration is clear, consistent and direct. It is to research, teach and practice in a manner that advances new ideas, sustainability and environmental stewardship while partnering with area businesses to enrich the livability and economy of the region. Consequently, the new School of Business Administration building will enhance Portland State University's reputation as an institution dedicated to social, economic and environmental sustainability. The building will seek LEED Gold certification at a minimum and aspires to achieve LEED Platinum certification. Given the School's international reputation for social and environmental stewardship, the new building will be a living laboratory for creating the next generation of leaders in the sustainable economy.

The project will provide a building program developed with the following goals:

- Provide enough teaching space to house all SBA classes.
- Provide sufficient space for SBA faculty, staff and graduate assistants, while allowing for future growth.
- Increase the social and interaction space within the building to better serve students, faculty and guests.
- Create visible, expandable centers that enhance the school's ability to directly contribute to the food, active wear and outdoor gear, and real estate industries, and to increase the success of the region's many small businesses.
- Design for the greatest flexibility of space to adjust for shifting needs over time.
- Design the new expansion to seamlessly, integrate to the existing building structures (ED/BA). The finished product shall appear to be a single concept.
- The new design and appearance shall inspire visitors as they approach the building by foot or vehicle.
- A significant portion of the renovated building and expansion's ground floor shall be available for retail space.
- Meets the visions and objectives outlined in the "SBA Building Design and Sustainability Visions" created by the SBA faculty. See Appendix 4.8.

The two major components of the project are:

- 1) Construction of a new approximately 42,000 (+/-) square feet addition to the North end of the building that will fully utilize the project site, create a new dramatic entrance to the School, and activate the building along Sixth Avenue.
- 2) Modernization and upgrade of the existing structure that is currently occupied by SBA and the Graduate School of Education, including addressing a significant amount of deferred maintenance.

A programming document for design of the building, initiated in 2008 and updated in 2010, is provided in Appendix 4.4. This document includes a two-month conversation with Portland State University's School of Business Administration faculty, students, staff and administrators.

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.

The Oregon State Board of Higher Education ("OSBHE") on behalf of PSU is seeking commissioning services for the School of Business Administration Expansion and Renovation project.

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 Consultant's 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 a Consultant's 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

It is estimated that the direct, hard construction costs for this project will total approximately \$44 million (excluding owner's contingency).

In addition to the expansion of the building, the SBA Expansion and Remodel project scope is listed below.

- Demolition
- Abatement
- Accessibility Improvements
- Seismic Stabilization
- Modify Connecting Bridges
- Window Replacement and Other Exterior Envelope Upgrades
- Interior Partition Replacement and Remodels Incidental to Other Construction.
- Floor Coverings
- Roof Repair and/or replacement
- Painting & Other Finishes
- Elevator Modernization and/or replacement
- Fire Protection System Upgrade
- Plumbing Upgrade including drain piping, water piping and fixtures.
- HVAC System Upgrades including replacement of duct board & upgrade of HVAC terminal units

- Atrium Ventilation System
- Electrical Distribution Upgrade including generator
- Lighting Upgrade including lighting control system.
- Fire Detection and Alarm Upgrade
- Audio visual and high tech upgrades in classrooms
- Solar Array System

1.2.1 Objectives of Commissioning in General

The objective of commissioning is to provide documented confirmation that the building fulfills the functional and performance requirements of the building Owner, occupants, and operators. To reach this goal, it is necessary for the commissioning process to confirm the owner's criteria for system function, performance, and maintainability; and also to verify and document compliance with these criteria throughout design, construction, start-up, and the initial period of operation. In addition, complete operation and maintenance (O&M) manuals, as well as training on system operation, are provided to the building operators to ensure the building continues to operate as intended. The commissioning provider typically reviews and comments on both the O&M manuals and the training materials, so that any necessary modifications and clarification can be made prior to their use.

The commissioning provider is involved throughout design confirmation, construction, start-up, and warranty phases. Their primary role during the overall design phase is to develop detailed commissioning specifications and review design to ensure it meets the Owner's objectives. During construction, the commissioning provider reviews the testing plan and its execution, which include some observation of system performance and review of contractor-prepared documentation for all systems' performance to ensure that all equipment, features, and systems are functioning in accordance with the Owner's project requirements and the contract documents. The commissioning provider is not responsible for design or general construction scheduling, cost estimating, or construction management, but assists the owner with problem solving or resolving non-conformance issues or deficiencies.

The commissioning provider shall hereinafter be called "Consultant"

1.2.2 Scope of Commissioning Services

The Owner will be requiring the Architect and CM/GC to provide Leadership in Energy and Environmental Design ("LEED") certification in accordance with the LEED rating system. The Consultant scope of work shall include services necessary to meet LEED Energy and Atmosphere Prerequisite 1, "Fundamental Commissioning and Verification," and LEED Energy and Atmosphere Credit 3, Enhanced Commissioning. Also included is coordination of all commissioning activities performed by the Architect and CM/GC to meet LEED certification.

Consultant shall be responsible for carrying out the following tasks:

Design Phase

(LEED Energy & Atmosphere Prerequisite 1.0 Fundamental Commissioning and Verification)

1. Document the Owner's Project Requirements and create a Basis of Design and Design Narrative based on documents prepared by the Architect and discussions with the Architect. For each commissioned item of equipment, feature, and system (collectively referred

- alternatively as “Components”), and for equipment, features, and systems that interact with the commissioned Components, develop a Commissioning Plan. Include performance criteria for each Component.
2. Prepare a Commissioning Plan (“Commissioning Plan”). The Commissioning Plan shall include the following:
 - A brief overview of the commissioning process to be employed on the Project
 - A list of all equipment, features, and systems to be commissioned
 - Identification of primary commissioning participants and their responsibilities
 - A description of the management, communication, and reporting functions to be performed in implementing the Commissioning Plan
 - A detailed outline of the commissioning process and scope, including submittal review, observation, start-up, testing, training, O&M documentation and warranty-period activities
 - A list of the written work products to be delivered to Owner
 - A performance schedule covering all commissioning activities
 - A description of the rigor and scope of testing to be performed
 3. Prepare the commissioning specifications. Commissioning specifications shall include the following:
 - The scope of commissioning to be performed, and by whom
 - The equipment, features, and systems to be commissioned
 - Requirements for commissioning-related submittal review, inspection, start-up, testing, training, O&M documentation and warranty period activities, commissioning documentation requirements, commissioning activity performance schedule, and rigor and scope of testing.
 4. Attend construction pre-bid meetings to answer commissioning-related questions.
 5. Prepare and implement a Thermal Comfort Verification plan (*EQc7.2*), based on review of the Thermal Comfort design and interview of building users.

Construction Phase

(LEED Energy & Atmosphere Prerequisite 1.0 Fundamental Commissioning and Verification)

1. Review the progress of the commissioning activities, which will be managed by the CM/GC. Verify that commissioning activities are being performed in accordance with the Commissioning Plan and the Construction Documents, in a logical, sequential and efficient manner using consistent protocols and forms, centralized documentation, clear and regular communications and consultations with all necessary parties (including but not limited to, the Owner, the CM/GC, the Architect, the Architect’s consultants and sub-contractors, frequently-updated timelines and schedules, and with competent technical expertise.
2. Coordinate the performance of commissioning activities with the CM/GC, ensuring that all commissioning activities are being incorporated into the master construction schedule.
3. Revise, as necessary, the Commissioning Plan developed during design, including scope and schedule. Submit each revised Commissioning Plan to the Owner for approval and upon approval, to the Architect and CM/GC for incorporation into the project.
4. Attend commissioning meetings as needed, and review all commissioning meeting minutes (recorded by the Architect and CM/GC).

5. Review information required to perform commissioning tasks, including O&M materials, functional test plans, contractor startup and checkout procedures. Before startup, review the detailed testing procedures (to be provided by the CM/GC).
6. Review all CM/GC submittals pertaining to equipment, features, and systems being commissioned for compliance with commissioning requirements.
7. Review requests for information and change orders, as required, to assess impacts on commissioning schedule and activities, and Owner's Project Requirements.
8. Review construction checklists for commissioned equipment, features, and systems (to be provided by the CM/GC).
9. Review the enhanced start-up and initial systems checkout plan prepared by the CM/GC for commissioned equipment.
10. Perform site visits to observe commissioned equipment, component, and system installations. Attend selected planning and job-site meetings to obtain information on construction progress. Review construction meeting minutes for revisions/substitutions relating to or affecting the commissioning process. Assist Owner in resolving any discrepancies.
11. Review reports for HVAC piping pressure test and flushing to confirm that proper procedures were followed. Include all testing documentation in the Commissioning Report (as defined below).
12. Review reports of any ductwork testing and cleaning to confirm that proper procedures were followed. Include all documentation in the Commissioning Report.
13. Document construction completion relating to commissioned equipment, component, and system installation by reviewing completed construction checklists and by selected on-site observation.
14. Document equipment and systems startup by reviewing start-up reports and by selected on-site observation.
15. Review air and water systems balancing by reviewing completed air and water systems balancing reports and by selected on-site observation.
16. Review the functional performance test procedures for equipment and systems (prepared by the CM/GC). This will include manual functional testing and energy management control system trending, and may include stand-alone datalogger monitoring, if required in the commissioning specifications.
17. Analyze functional performance trend logs and monitoring data to verify proper performance of all commissioned equipment, systems, and components.
18. Witness (by on-site observation) selected manual functional performance tests performed by installing contractors. Review reported test results, and require CM/GC to order retesting as necessary until satisfactory performance is achieved. The functional testing shall include operating the system and components through each of the written sequences of operation, and other significant modes and sequences, including startup, shutdown, unoccupied mode, manual mode, staging, miscellaneous alarms, power failure, security alarm when impacted, and interlocks with other systems or equipment. Sensors and actuators shall be calibrated during construction check-listing by the installing contractors, and spot-checked by the Consultant during functional testing. Tests on respective HVAC equipment shall be executed, if possible, during both the heating and cooling season. However, some overwriting of control values to simulate conditions shall be allowed if necessary. Functional testing shall be done using conventional manual methods, control system trend logs, and read-outs or stand-alone dataloggers, as deemed appropriate by the Consultant and the Owner.

19. Maintain a master commissioning issues log and a separate record of all functional performance testing. Report all issues as they occur to the Architect, CM/GC and Owner. Provide directly to the Architect, CM/GC and Owner written commissioning progress reports and test results, together with recommended actions.
20. Review the CM/GC's training plan for the PSU operating personnel for compliance with the manufacturer, design, and commissioning specifications.
21. Review the CM/GC prepared O&M manuals for commissioned equipment, features, and systems for compliance with manufacturer specifications.
22. Compile a Commissioning Report ("Commissioning Report"), which shall include:
 - Owner's Project Requirements
 - Basis of Design
 - Design Narrative
 - A brief summary report that includes a list of all commissioned equipment, features and systems, and the Consultant's evaluation of compliance/non-compliance with the requirements of the Construction Documents. The evaluation for each commissioned item of equipment, feature and system shall be determined based on the following criteria:
 - Meeting Design Intent
 - Meeting specifications
 - Proper Installation
 - Functional Performance and Efficiency
 - Proper O&M Documentation
 - Proper Operator Training Manual provisions
 - All outstanding non-compliance items shall be specifically listed. Recommendations for improvement to equipment, features, systems, or operations, future actions, commissioning process changes, etc. shall also be listed. Each non-compliance issue shall be referenced to the specific functional test, inspection, trend log, etc. where the deficiency is documented.
 - Also included in the Commissioning Report shall be the issues log, commissioning plan, commissioning progress reports, O&M manual reviews, comments, and recommendations, operating personnel training plan and records, performance test schedules, construction checklists, start-up reports, functional tests, and trend log analysis.

Warranty Period

(LEED Energy & Atmosphere Prerequisite 1.0 Fundamental Commissioning and Verification)

Coordinate and observe required opposite season or deferred testing and deficiency corrections, and provide the final testing documentation for the Commissioning Report and O&M manuals.

Design Phase

(LEED Energy & Atmosphere Credit Enhanced Commissioning)

1. Conduct a review of the Design Documents to ensure that each commissioned item of equipment, feature, and system meets the Owner's Project Requirements relating to functionality, energy efficiency, performance, maintainability, sustainability, systems cost, indoor environmental quality, and local environmental impacts. Evidence of this design review must be fully documented in a written report.

2. Conduct a review of the Construction Documents to ensure that commissioning is adequately specified, that each commissioned item of equipment, feature, and system can be commissioned and meets both Owner's Project Requirements and the design intent with regard to functionality, performance, maintainability, sustainability, systems cost, indoor environmental quality, and local environmental impacts. Evidence of this design review must be fully documented in a written report.

Construction Phase

(LEED Energy & Atmosphere Credit Enhanced Commissioning)

1. Conduct a review of the Architect and CM/GC's submittals relating to commissioned equipment, features, and systems to ensure that the particular item of equipment, feature, or system will meet the commissioning specifications and Owner's Project Requirements.
2. Develop an indexed Recommissioning Management Manual ("Recommissioning Management Manual"), which shall include the following:
 - Owner's Project Requirements
 - Basis of Design
 - Design Narrative
 - As-built sequences of operation for all equipment, features, and systems; control drawings
 - A list of time-of-day recommissioning schedules and a schedule of recommissioning frequency
 - A description of all energy- and water-saving features and strategies incorporated into the Project, together with operating instructions and an explanation of the effect of the feature's function and maintenance on energy use
 - Guidelines for establishing and tracking benchmarks for whole building energy use and equipment efficiencies of cooling, heating and service hot water equipment
 - Seasonal start-up and shutdown procedures, manual and restart operation procedures, recommendations regarding seasonal operational issues that affect energy use
 - Recommendations for recalibration frequency of sensors and actuators by type and use
 - A list of all user-adjustable setpoints and reset schedules, with a brief discussion of the purpose of each and the range of reasonable adjustments, together with associated energy implications/impacts
 - Plans for continuous commissioning or recommended frequency for recommissioning, by equipment type with reference to tests conducted during initial commissioning
 - A schedule frequency to review the various setpoints and reset schedules to ensure they are at optimally efficient values
 - Guidelines for energy accounting, including assurance that future renovations and equipment upgrades will not result in decreased energy efficiency or deviation from Owner's Project Requirements
 - A list of diagnostic tools with use descriptions to assist facility staff
 - A copy of the Commissioning Report

Warranty Period

(LEED Energy & Atmosphere Credit Enhanced Commissioning)

Return to the Project site at 5-months, 9-months, and prior to completion of 12-month warranty period and review with Owner's Authorized Representative the current building operation and

issues, if any, concerning the original or seasonal recommissioning. Also, interview facility and staff to identify problems or concerns they may have with operating the building as originally intended. Make suggestions to the Owner for improvements and for recording these changes in the O&M manuals. Identify issues that may be covered by warranty or are addressed in the original construction contract. Assist Owner's Authorized Representative in developing reports and documents and requests for services to remedy outstanding problems.

1.2.3 Systems to be Commissioned

The following systems and assemblies (including all associated equipment, features and components) will be commissioned:

- Central building automation system
- All heating, ventilating and air conditioning systems, equipment and controls
- All fire and life safety systems
- All elevator systems and equipment
- All electrical systems
- Scheduled or occupancy sensor lighting controls
- Daylight dimming controls
- All plumbing systems
- Solar array systems

1.2.4 Coordination of Commissioning Activities

Consultant shall be responsible for coordinating with the Owner, Architect and CM/GC all commissioning activities involved in the acquisition of LEED certification. Coordination responsibilities shall include:

1. Ongoing communication with the Owner and Design/Build team regarding the status of commissioning activities
2. Review and updating of the Commissioning Schedule to reflect any changes in the timing or sequence of commissioning activities
3. Attendance at commissioning, planning, and job-site meetings as needed to ensure proper coordination of commissioning activities

1.2.5 Desired Qualifications

It is the University's desire for the person(s) designated on the Consultant team to satisfy as many of the following requirements as possible:

- Has acted as commissioning provider project leader for at least three (3) similar projects
- Has extensive experience in the operation and troubleshooting of heat pumps, heat exchangers, HVAC systems, energy-management control systems, fire and life safety systems, elevator systems and equipment, electrical systems, lighting controls, plumbing systems and solar array systems.
- Has extensive field experience in commissioning; a minimum of five (5) full years in this type of work is required
- Is knowledgeable in building operation and maintenance, as well as O&M manual review and systems training
- Is knowledgeable in testing and balancing of both air and water systems
- Is experienced in energy-efficient equipment design and control strategy optimization

- Has direct experience in monitoring and analyzing system operation using energy-management control system trending and stand-alone data logging equipment
- Has excellent verbal and written communication skills; is highly organized and able to work with both management and trade contractors
- Is experienced in writing commissioning specifications
- Has a bachelor’s degree in mechanical or electrical engineering and P.E. certification is also strongly preferred; however, other technical training, past commissioning, and field experience will be considered
- Being a member of the Building Commissioning Association is desirable

1.3 SELECTION PROCEDURE AND ANTICIPATED TIMETABLE

The selection procedure is intended to evaluate the capabilities of interested consulting firms to provide cost estimating 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 firms will 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.

Attendance at the Mandatory Pre-Proposal Conference is required to propose on this Project. This Conference will be conducted at the time and location specified in Section 0. Attendance will be documented through a sign-in sheet prepared by the OUS representative. Proposers who arrive more than 10 minutes after start time of the meeting (as stated in the solicitation and by the OUS representative’s watch) or after the discussion portion of the meeting (whichever comes first) shall not be permitted to sign in and will not be permitted to submit a bid on the Project. **Note that Parking at PSU can be difficult to find. Please plan accordingly.**

RFP schedule is as follows:

June 6, 2014Advertisement of Request for Proposals
June 17, 2014 @ 3:00 pmMandatory Pre-proposal Conference
Meet at the Market Center Building, Suite 312,
1600 SW 4th Avenue, Portland.
**Note: Parking is difficult to find at PSU. Please schedule your time accordingly.
June 20, 2014 @ 5:00 pmApplicant questions due, solicitation protest deadline
June 24, 2014Final addendum published if needed
July 1, 2014 @ 3:00 pmProposals Due**
At the Market Center Building, Suite 260
1600 SW 4th Avenue, Portland.

The following are proposed timelines and are subject to change without notice:

July 9, 2014Notice of Intent to Award or notification of the most qualified proposers, and assignment of interview appointments
July 15-17, 2014Finalist interviews (please hold these dates as finalists will be assigned a time on one of these three days.)
July 18, 2014Notice of Intent to Award issued to apparent successful Proposer

July 24, 2014 @ 5:00 pm.....Selection protest period ends
July 25, 2014PSU finalizes Agreement

Project Milestones:

May 15, 2014Programming Complete
August 30, 2014Schematic Design Complete
December 31, 2014.....Design Development Complete
May 31, 2015Construction Documents Complete
May 31, 2017Substantial Completion Date
September 1, 2017.....Final Completion Date

1.4 RESPONSE

To be considered for selection, written proposals and bid forms must arrive at Portland State University, Contracting and Procurement Services by the dates specified in Section 1.3. Delivery is recommended. Proposers who mail packages should allow ample delivery time to ensure timely arrival.

FOR DELIVERY:

Portland State University
Contracting and Procurement Services
Attn: Cate Antisdell
SBA Expansion & Renovation Commissioning RFP
1600 SW Fourth Avenue, Suite 260
Portland OR 97201

FOR MAIL: (Not Recommended)

Portland State University
Contracting and Procurement Services
Attn: Cate Antisdell
SBA Expansion & Renovation Commissioning 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.

Proposers 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 INSURANCE AND LICENSURE REQUIREMENTS

1.5.1 Insurance Provisions

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

- A. **Workers Compensation** - Consultant, 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** - Consultant shall obtain, at the Consultant'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** - Consultant shall obtain, at Consultant'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. Consultant shall provide proof of insurance to Owner of not less than the following amounts: **\$1,000,000 each occurrence**.
- D. **Professional Liability** - Consultant 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 Consultant, as it pertains to 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.

Consultant 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.

Consultant 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 Consultant's services to be provided under the Agreement. Consultant 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 Consultant.

1.5.2 Professional Registration

The Consultant and all firms providing professional 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 necessary licensure requirements.

1.6 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.

1.7 QUESTIONS FROM PROPOSERS

Questions and requests for clarifications or changes from proposers 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.

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. Proposers are encouraged to call to check on the status of such addenda prior to submission of their Written Proposals.

1.8 PROTESTS

1.8.1 Solicitation Questions, Requests for Clarification or Change, and Protests

Prospective proposers 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 Consultant's Agreement, Appendix 4.1) by e-mail to 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.

1.8.2 Selection Protests

Any proposer who responds to the RFP and claims to have been adversely affected or aggrieved by the selection of competing proposers 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.

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.

FOR DELIVERY:

Portland State University
Contracting and Procurement Services
Attn: Cate Antisdell
PROTEST - SBA Expansion Commissioning RFP
1600 SW Fourth Avenue, Suite 260
Portland OR 77201

FOR MAIL: (Not Recommended)

Portland State University
Contracting and Procurement Services
Attn: Cate Antisdell
PROTEST - SBA Expansion Commissioning RFP
PO Box 751, Mail Stop: FAST-CAPS
Portland OR 97207-0751

1.9 INCURRED COSTS

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

No billable work can proceed prior to negotiation and execution of a Consultant's Agreement and the Consultants receipt of a Notice to Proceed.

1.10 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.

1.11 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.

1.12 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

2.1.1 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 exceed six (6) double-sided 8 ½" x 11" pages in length for a total of twelve (12) pages. 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 and the Cost Estimating Rate Sheet. If proposal exceeds the page limit, only the allowed number of pages will be considered starting with the first page.
6. Be of a readable font size (such as Arial size 10).
7. Be stapled in the corner and printed on recycled paper.

2.1.2 Submission must include:

1. One (1) CD containing a PDF (Portable Document Format) version of the written proposal
2. Four (4) paper copies of the proposal
3. Items above submitted in a sealed envelope that includes contractor name and project name.

2.2 EVALUATION CRITERIA

2.2.1 Professional Experience of the Firm - 25 Points

Demonstrate experience of the firm in relation to the scope of work, and quality of service provided to customers in the past.

2.2.2 Professional Expertise of Personnel – 25 points

Demonstrate expertise of key personnel in relation to the scope of services required.

2.2.3 Continuity of Firm's Proposed Staff and Subconsultants - 10 Points

Demonstrate continuity of service of staff and established relationships with proposed subconsultants.

2.2.4 Quality Assurance/Quality Control Plan - 10 Points

Describe your Quality Assurance/Quality Control Plan, and cite examples of successful implementation of the plan.

2.2.5 Contract Price - 20 Points

Submit proposed fee, broken down by project phase. Submit labor rates for all classes of personnel working on the project. The Grand Total amount based on those rates will be scored as follows: $[1 - (\text{Proposer's Bid} - \text{Low Proposer's Bid}) / \text{Proposer's Bid}] \times 20$ points. Note: there will be no reimbursable allowance on this contract.

2.2.6 Equity and Diversity – 10 Points

PSU is committed to increasing contract opportunities for Minority, Women and Emerging Small Businesses (MWESB).

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.

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.

2.2.7 Optional Reference Check – 10 Points

List four clients for whom you have provided similar services for a similar type of project in the past four years. These references should have had direct contact with the primary staff proposed on this project. Give a brief scope of work for each project. Provide the contact person's name and current telephone number. Provide two client and contractor references for projects currently under construction, or completed within the last year, including contact names and current telephone numbers. References may be scored for short-listed firms only.

2.2.8 Optional Interview – 25 Points

For short-listed firms, interviews may be conducted to allow the proposer to expand on each of the above categories.

END OF SECTION 2

SECTION 3 - EVALUATION AND SELECTION PROCESS

3.1 SELECTION COMMITTEE

Proposals will be evaluated by a qualified Selection Committee. Selection Committee members will not be announced prior to interviews.

3.2 EVALUATION CRITERIA

The Selection Committee will evaluate each applicant's qualifications, background and experience to determine if, in the judgment of the Committee, the organization is adequately qualified to perform the Work.

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

Item	Criteria and Points
2.2.1	Professional Experience of the Firm - 25 Points
2.2.2	Professional Expertise of Personnel – 25 points
2.2.3	Continuity of Firm's Proposed Staff and Subconsultants - 10 Points
2.2.4	Quality Assurance/Quality Control Plan - 10 Points
2.2.5	Contract Price - 20 Points
2.2.6	Equity and Diversity – 10 Points
Total available for written Proposals – 100 points	
2.2.7	Optional Reference Check – 10 Points
2.2.8	Optional Interview – 25 Points
Total available for short-listed firms – 35 points	
Total possible– 135 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 2.2.6.
- 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 shall be checked and scored for interviewed firms. Points will be assigned using the criteria specified in Section 2.2, item 2.2.7.
- E. The Proposer with the most cumulative total points (Section 2.2, items 2.2.1 through 2.2.8) shall be issued a Notice of Intent to Award.

END OF SECTION 3

APPENDICES

- 4.1 SAMPLE CONSULTANT AGREEMENT
- 4.2 PSU CAMPUS MAP
- 4.3 PROJECT SCHEDULE
- 4.4 JAN. 2011 ZGF REPORT
- 4.5 CURRENT FLOOR PLANS
- 4.6 DRAWINGS
 - 4.6.1 Original SBA Design Drawings
 - 4.6.2 Original ED Design Drawings
- 4.7 PSU DATA AND CABLING STANDARDS
- 4.8 SBA BUILDING DESIGN AND SUSTAINABILITY VISIONS
- 4.9 BRIGHTWORKS REPORT