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# OREGON STATE UNIVERSITY

## REQUEST FOR PROPOSALS

(#176044)

### OSU-CASCADES COMMISSIONING SERVICES

#### **CONTRACT ADMINISTRATOR: Oregon State University**

Brooke Davison

Construction Contracts Officer

**Email: [Brooke.Davison@oregonstate.edu](mailto:Brooke.Davison@oregonstate.edu)**

**Phone: (541) 737-7342**

**FAX: (541) 737-4810**

ISSUE DATE: May 6, 2015

RFP CLOSING (DUE) DATE May 19, 2015 3:00 PM, Local Time

NO LATE RESPONSES WILL BE ACCEPTED

### SUBMITTAL LOCATION

Oregon State University

Capital Projects Contracts Administration

Attention: Brooke Davison

Construction Contracts Officer

3015 SW Western Blvd.

Corvallis OR 97331

## Introduction

Oregon State University (“OSU”) is soliciting the services of a Commissioning firm (“Consultant”) to provide Commissioning Services for equipment and systems to be designed for and installed in three (3) new buildings at OSU-Cascades in Bend, Oregon (the “Project”).

Commissioning Services includes, but is not limited to:

- Coordination of Commissioning Services during design;
- Plan and specification review;
- Draft commissioning plan for construction;
- Development of specifications for commissioning;
- Development of pre-functional checklists;
- Execution of checklists;
- Start-up and testing of buildings systems;
- Operation and maintenance (“O&M”) manuals; and
- Training of OSU-Cascades staff.

Building systems to be commissioned include, but are not limited to: HVAC, HVAC controls, electrical/secured power, emergency generator system, communications, security (including closed circuit television systems and door locks), electronic (including voice and data wiring system and data communications system), fire protection, and testing, adjusting, and balancing (“TAB”) of the ventilation systems.

OSU-Cascades will be opening a new college campus located in Bend, Oregon. Opening of the campus is anticipated for fall 2016. The campus will include construction of three (3) new buildings on an approximately 10-acre site, located at 1500 SW Chandler Avenue in Bend. Construction is anticipated to begin summer 2015, subject to a pending land-use appeal. The buildings will consist of the following:

- **Academic Building**

The academic building will consist of three floors of classroom and laboratory space, spread over approximately 43,300 gross square feet. The building is being designed by Boora Architects and will be constructed through a construction manager/general contractor (“CM/GC”) contract by Fortis Construction Company.

- **Dining and International Learning**

The dining and international learning center will consist of two floors of space; the first floor will include a kitchen, seating space, and administrative offices; the second floor will house classroom and office space. This building will measure 27,500 gross square feet. The building is being developed through a public/private partnership with American Campus Communities (“ACC”). ACC has hired a team led by SERA Architects to design the building and will construct the building with Walsh Construction Company as the general contractor.

- **Residence Hall**

The residence hall will consist of four floors of livings space for students. This building will measure 82,000 gross square feet. The building is being developed by ACC. ACC has hired a team led by SERA Architects to design the building and will construct the

building with Walsh Construction Company as the general contractor. The estimated direct construction budget for the construction of the three buildings is \$62 million.

Construction is anticipated to begin in summer 2015. The Project must be completed by final completion of the construction of the three buildings, anticipated for fall 2016.

Two phases of commissioning services are required. The first phase will begin immediately upon execution of a Contract and will include design review, development of a commissioning plan, specifications, and an owner training plan; and development of performance test procedures. The second phase of commissioning will begin at start of construction, and will continue through acceptance of the project by OSU-Cascades. The scope of services to be provided during the second phase may include, but are not be limited to: implementation of the commissioning plan and construction 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-Cascades personnel, observation of systems and equipment testing; review of operations and maintenance (O&M) manuals; and review of relevant shop drawings and submittals. Some of these services may include the coordination of various trades. Commissioning services will also include testing, adjusting, and balancing ("TAB") services as well as the irrigation audit.

In the performance of commissioning services, the Consultant will be responsible for coordinating with the architects, their staff, and consultants, and the contractors 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 OSU Standard 580-063-0025.

#### 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 agreement attached as an exhibit to this RFP.

#### Response Requirements/Evaluation Criteria:

Proposers shall indicate in writing the following information about the firm's ability and desire to complete the Project. Points will be awarded up to the maximum points allowable for each criteria, as noted in the parentheses at the end of each criteria below.

1. Provide a 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 and what stage you are in terms of completion. (weight 10)
2. Project Samples: Describe three (3) projects you feel are comparable to this Project, which have been completed within the last 5 years and managed by the project manager proposed for this Project.
  - a. Describe the relevance of the example projects to the Project and Services

included in this solicitation, including descriptions of how many outstanding issues and project constraints were addressed and resolved. (15 Points)

- b. Include a description of project type, location, size, duration and objectives; a list of key project staff and their roles; tasks performed by the Proposer to fulfill the project objectives; the project budget, and whether the schedule and budget were met. (weight 15)
3. Key Staff: Identify the key personnel in your firm who will be assigned to this project, their certifications and commissioning responsibilities on previous projects, and specific responsibilities for this project. (weight 20)
4. 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. Identify your firm's role in each of these projects (if applicable). (weight 10)
5. Provide an example of a commissioning plan and an owner training plan that your firm has utilized on a previous project. Include this information as an appendix, and as such will not count toward the 25 page limit. (weight 20)
6. 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)

7. Provide the names, addresses and phone numbers of three clients for whom your firm has provided commissioning services within the past five (5) years. 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-Cascades may check with these references and/or may check with other references associated with past work of your firm. (weight 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-Cascades for the Project.

May 5, 2015	Issue RFP
May 19, 2015 3:00 PM, PST	RFP response due
June 5, 2015	Initial evaluation complete
June 15, 2015	Telephonic interviews with Selection Committee
June 16, 2015	Tentative selection/notification

### Evaluation Process:

This Request for Proposals (RFP) is the first step in a two-step process in the selection of a Consultant for this Project. The two-step selection process includes evaluation of the written responses to the Request for Proposal and then participation in a telephonic interview (the second step) that is scheduled for June 15, 2015 (times will be assigned at random). 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 item.

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 and identify the top ranked Proposer.

Interviews will include a presentation period for the proposers to highlight their proposals as well as respond to additional questions or information requested in advance by the evaluation committee, and then a separate Q&A session.

The RFP requires reference information for your firm. OSU-Cascades 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 committee member rankings in their discussion. The discussion of the responses will include firm strengths and weaknesses and the committee member scorings. After all of the interviews and committee discussions are completed, the evaluation committee will select the Apparent Successful Proposer by ranking the proposers based on all information received, presented, found and heard.

Responsibility Evaluation:

OSU will investigate each proposer's responsibility in accordance with the requirements of Division 61 of Oregon State University Standard 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-Cascades to obtain any information OSU-Cascades 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 Five (5) 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:

Brooke Davison  
Capital Projects Contracts Administration  
Oregon State University  
3015 SW Western Blvd.  
Corvallis OR 97331

Your proposal must be contained in a document not to exceed six (6) 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 page limit and should be appended to the end of your response. No supplemental information to the 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, and example commissioning plan, will not be counted in the 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 and contain appropriate contract information for communication purposes.**

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 OSU or OSU-Cascades regarding any information in this RFP must be addressed in writing, fax or email to Brooke Davison 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 at [debera.massahos@oregonstate.edu](mailto:debera.massahos@oregonstate.edu). Requests and protests must be received no later than 5:00 p.m., May 10, 2015. 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 to the OUS Business and Bid Opportunities website. 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 Contracts 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 Ms. 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 is seeking to award a consultant's agreement for the Project; however, OSU reserves the right to terminate the project and the agreement, after completion of any phase in the project.

Additional Requirements:

Pursuant to OSU Standard 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 OSU Standard 580-061-0040, 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 Commissioning Consultants Contract

End of RFP

