Campus Wide Facility Condition Assessment
Solicitation #1522

Request for Proposals for Professional Services

July 21, 2014

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All proposal documents are available at:
www.pdx.edu/purchasing-contracting/construction-contracting
SECTION 1 – ADMINISTRATIVE INFORMATION

1.1 INTRODUCTION

Portland State University is a large and diverse urban campus which encompasses 50 acres and 53 buildings with approximately 5.3 million square feet of space. PSU offers more than 60 undergraduate and 40 graduate programs in fine and performing arts, liberal arts and sciences, business administration, education, urban and public affairs, social work, engineering, and computer science. The current student enrollment for PSU is 29,400 as of fall 2013. This Request for Proposal is for work to complete a building condition assessment and inventory of the majority of PSU’s buildings. This inventory includes, but is not limited to, housing, parking structures, academic buildings, science/lab spaces, and special use facilities. The team selected will work closely with PSU staff on each building to ensure the final report is accurate and complete.

The estimated cost of this project is $185,000.00. Estimates are based on the assumptions of $0.05 per square foot for occupied spaces and $0.025 per square foot for unoccupied spaces.

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

This Request for Proposals (“RFP”) does not commit Portland State University (“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 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.

1.2 SCOPE OF WORK

PSU is requesting proposals from professional services firms for comprehensive Facility Condition Assessment services, including complete software capabilities as described herein. Required services shall include, but are not limited to:

1. Identifying and documenting current facility condition and deficiencies
2. Recommending corrections for all deficiencies
3. Providing cost estimates for corrections
4. Forecasting future facility renewal costs
5. Incorporating pre-existing FCA data

Consultant will meet with PSU to identify all reliable sources of existing study materials for information such as building lists, plans, maps, studies, inventories, naming conventions, and capital requests. In order to produce accurate data and ensure consistent, up-to-date reports, PSU will provide any past studies, current bids for work, or detailed evaluation reports such as:

- Asset preservation studies
- Capital Plan
- Detailed Technical Studies
- Roofing studies
- Building drawings: mechanical, electrical, architectural, structural; and AutoCad versions
- Facility Replacement costs
- Special studies conducted
- Building maintenance histories
• FEMA Seismic reports
Where applicable, study amounts, engineering reports, HAZMAT audits, roofing reports, etc. will be incorporated in the database and reflected in the final reports.

The types of building systems surveyed may vary with each building and shall include, but are not limited to, the following systems:

- Exterior Systems: foundation, roofs, walls, window systems, exterior doors, civil/structural components, sky-bridges
- Interior Systems: walls, doors, flooring, ceiling, hardware, architectural components
- Fire/Life Safety issues (including hazards, alarms, fire escapes, exit codes)
- Heating, Ventilation and Air Conditioning, including controls and terminal units (condition)
- Electrical and Electrical Distribution (condition, not load analysis)
- Plumbing Systems: fixtures, supply, storm and sanitary drainage, on and off valves, irrigation
- Fire Protection
- Special Construction
- Specialized Equipment & Systems
- Elevator Systems if Owner elects to add Option #2

1.2.1 Method of Collection

A. General
The Consultant shall inspect all identified facilities to produce an accurate analysis that identifies all components and elements requiring maintenance, repair, or major capital investment. The Inspection team will include an architect and engineer. The Consultant will thoroughly examine building systems using non-destructive on-site observations to compile a complete picture of current conditions, then use the PSU database to record cost data and expected life cycles. With this information, consultant will create a database that will generate an accurate projection of building component lifespans and repair/replacement cost data for up to thirty (30) years. The Consultant will utilize processes that eliminate variability and produce accurate facility information.

B. Inspector Training
Consultant will ensure that the inspection staff has the appropriate training and equipment (i.e. ultra sound equipment) to record consistent and accurate data.

C. PSU Staff Interviews
In order to understand the characteristics of each property beyond what is recorded in existing plans, documents, or other materials, the Consultant will interview knowledgeable PSU project managers, engineers, maintenance staff, and/or tenants for each facility, in order to benefit from their input and perspective. These interviews will be facility-specific and are to be reflected in the final reports.

D. Inspection Schedule
Consultant will coordinate with PSU staff for dates and times to conduct the on-site inspections. A master schedule of the entire project will then be circulated for review. After receiving comments, Consultant will send finalized copies to all affected parties.
E. Inspections

The method of the inspection process shall allow for a comprehensive inspection of observable systems, while utilizing input from knowledgeable PSU staff to complement the assessment of current conditions with details of the facilities’ background. At a minimum, Inspectors shall gather the following information on each property:

- **Property Characteristics** - An inventory of all building systems with each system component quantified as a count, an area, a length, and/or a height; whichever measurement is most appropriate for each system.
- **Age** - Identification of the year each system component was installed.
- **Current Condition** - An assessment of the current condition of each system component and a determination of the level of repair necessary to restore these components to optimal condition, or year the asset is to be replaced.

For purposes of consistency, system components shall be defined along with a standard list of repairs and action levels for inspectors to choose from in rating each system condition. Action level shall be defined for individual components. Standard definitions and systems of actions are intended to provide a more accurate assessment of facilities.

1.2.2 Format

The equipment, asset, and deficiency/project information will need to be provided in a format that will allow for import into PSU’s AiM facilities management software, version 7, specifically the master asset and property profiles, and the assessment and needs analysis module screens. The AiM 7.0 Reference Guide, ANA (Assessment and Needs Analysis) Data Requirements document (Appendix 4.5) assists in the definition and explanation of formats used in bulk data loading for AiM.

1.2.3 Options

**Option #1: LEED Assessment and Submission**

Perform all data collection and documentation necessary for LEED Existing Building submission, on the following buildings:

- Urban Center Building (CUPA, DLC, Transit Info Center)
- Stephen E. Epler Hall (SEH)
- Parking Structure One (PS1)

**Option #2: Perform In Depth Elevator Study**

Engage an elevator consultant to provide a detailed study of elevator equipment and efficiency.

**Option #3: Broadway Housing Building**

The Broadway Housing Building had a recent Facilities Condition Assessment performed on it. Consultant shall review the current BH Condition Assessment (Appendix 4.6), BH Funding Analysis (Appendix 4.7), update missing information, and provide information in the required format described in this RFP.

**Option #4: Parking Structures**

Many of the Parking Structures had recent Facilities Condition Assessments performed for them. Consultant shall review the provided FCAs (Appendix 4.8), update the missing information, and provide the information in the required format described in this RFP.

No billable work can proceed prior to negotiation and execution of an Agreement and the Consultant’s receipt of a Notice to Proceed.
1.3 INSURANCE, PROFESSIONAL REGISTRATION REQUIREMENTS

Due upon signing an Agreement:

☐ General Liability – $1M/$2M
☐ Auto Insurance – $1M/$2M
☐ Worker’s Compensation
☐ Professional Liability – $1M/$2M

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.

All insurance certificates must meet the requirements of the PSU Consultant Terms and Conditions, Section F.2.

Proposer shall include in its proposal all insurance costs required to complete the Base Fee and all Options for this Project.

1.4 MANDATORY PRE-PROPOSAL MEETING

A mandatory pre-proposal meeting will be conducted. Only Proposers who have an employee at the meeting shall be allowed to proposal. Attendance will be documented through a sign-in sheet prepared by the PSU representative. After the meeting there may be a walk through and examination of the site and conditions.

Prime Proposers who arrive more than 5 minutes after start of time of the meeting (as stated in the solicitation and by the PSU representative’s watch) or after the discussion portion of the meeting (whichever comes first) may not be permitted to submit a proposal on the project.

PRE-PROPOSAL MEETING LOCATION:
Market Center Building
1600 SW 4th Avenue, Suite 316
Portland, OR 97201

1.5 SCHEDULE

Advertisement of Request for Proposals......................................................... July 21, 2014

Mandatory Pre-Proposal Meeting ......................................................July 24, 2014 @ 3:00 PM local time

Questions Due....................................................................................... August 4, 2014 @ 5:00 PM local time

Solicitation Protest Deadline ................................................................. August 4, 2014 @ 5:00 PM local time

Final Addendum Shall Be Issued By ....................................................August 6, 2014

Proposals Due.......................................................................................August 12, 2014 @ 1:00 PM local time

The following dates are tentative and subject to change without notice:

Notice of Intent to Award or notification of the most qualified........ August 19, 2014

Proposers and assignment of interview appointments

Finalist Interviews .............................................................................. August 26, 2014
Notice of Intent to Award (if interviews are held)............................. August 27, 2014

Selection Protest Deadline................................................................. September 2, 2014 @ 5:00 PM local time

PSU Issues Agreement ................................................................. September 3, 2014
Project Milestones

- Contract Executed: September 10, 2014
- Investigation/Data Collection Period: September 10 to November 12, 2014
- Report Preparation: November 13 to December 31, 2014
- Report Submission to PSU: January, 2015

1.6 QUESTIONS

Prospective Proposers must submit questions or requests for clarification or change via email to proposals@pdx.edu. Questions must be received by the deadline indicated in Section 1.5.

Questions and requests for clarification or change that are timely received will be answered via addenda. Any changes to the RFP resulting from such questions will be made only via addenda to the RFP. Responses from Owner not contained in an official addendum to the solicitation will not be binding on Owner. The final addenda, if any, will be released no later than the date specified in Section 1.5. Proposers are encouraged to check on the status of all addenda prior to submission of their proposal.

1.7 PROTESTS

1.7.1 Solicitation Protests

Prospective Proposers must submit protests of particular solicitation provisions, specifications, and/or conditions (including comments on any specifications that a firm believes limits competition) via email to proposals@pdx.edu. Solicitation protests must be received by the deadline indicated in Section 1.5.

Solicitation protests must include the reasons for the protest and any proposed changes to the RFP. Protests will be answered directly with the protesting Proposer. Any changes to the RFP resulting from a protest will be made only via addenda to the RFP. Responses from Owner not contained in an official addendum to the solicitation will not be binding on Owner. Proposers are encouraged to check on the status of all addenda prior to submission of their proposal.

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.

1.7.2 Selection Protest

Any Proposer who has proposed on this RFP and claims to have been adversely affected or aggrieved by the selection of competing Proposers may submit a protest via email to proposals@pdx.edu. Selection protests must be received by the deadline indicated in Section 1.5.

Protests will be answered directly with the protesting Proposer. Selection protests must comply with and will be addressed pursuant to Oregon Administrative Rule 580-061-0145. (http://arcweb.sos.state.or.us/pages/rules/oars_500/oar_580/580_061.html)

1.8 ADDENDA

This solicitation will only be modified by documents issued as addenda by Owner. No other direction or comments received by Proposers, written or oral, will serve to change the solicitation document.
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 Agreement and the Consultant’s receipt of a Notice to Proceed.

1.10 PUBLIC RECORDS

PSU will keep this RFP and each proposal received in response to it, together with all documents pertaining to the award of any contract, as part of the 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.

1.11 PROPOSAL SUBMISSION

To be considered for selection, written Proposals must arrive at the location shown below by the date and time specified in Section 1.5. Delivery is recommended. Proposers who mail packages should allow ample delivery time to ensure timely arrival. The address is:

FOR DELIVERY:               FOR MAIL: (Not Recommended)
Portland State University   Portland State University
Contracting and Procurement Services
Attn: Cate Antisdel
CW Facility Condition Assessment RFP
1600 SW Fourth Avenue, Suite 260
Portland OR 77201

1600 SW Fourth Avenue, Suite 260
Portland OR 77201

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.
1.12 **FORM OF AGREEMENT**

A sample copy of the Consultant Agreement is attached to this RFP (Appendix 4.2). PSU will enter into negotiations with the selected firm to determine final scope and description of services, schedule and cost and, if the negotiations are successful, will enter into an Agreement substantially 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 the next highest ranked Proposer.

1.13 **NON-RESPONSIVE PROPOSALS**

Proposals which are incomplete, conditioned or qualified, are not in conformity with the law, contain a statement by the Proposer reserving the right to accept or reject an award or to enter into the Agreement, or include any other irregularity shall be rejected as non-responsive if the irregularity is material and may be rejected as non-responsive if the irregularity is not material.

1.14 **PROPOSAL VALIDITY PERIOD**

If an Agreement is to be awarded, it shall be made within 60 calendar days after the proposal submission deadline. Proposal shall be considered valid during this period.

1.15 **TERMS FOR PROPOSING**

By submitting a proposal, 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 the Owner 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-061-0040, Proposers are hereby notified that PSU has adopted policies applicable to consultants and contractors that prohibit sexual harassment and that Proposer and their employees are required to adhere to Owner’s policy prohibiting sexual harassment in their interactions with members of Owner’s community.

The Owner is committed to ensuring equity and diversity in its procurement and contracting process and increasing opportunities for Emerging Small Businesses and Minority and Women Owned Businesses. Therefore the Owner strongly encourages its contractors and consultants to use these businesses in providing services and materials for Owner contracts and projects.

**END OF SECTION 1**
SECTION 2 - PROPOSAL REQUIREMENTS

2.1 PROPOSAL SUBMISSION

To be considered for selection, written Proposals must arrive at Portland State University, Contracting and Procurement Services by the date specified in Section 1.5. Delivery is recommended. Proposers who mail packages should allow ample delivery time to ensure timely arrival. The address is:

2.1.1 Proposals must:
1. Include responses to the requested information in Section 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 ten (10) double-sided 8 ½” x 11” pages in length for a total of twenty (20) 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. 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. Five (5) paper copies of the proposal
3. Items above submitted in a sealed envelope that includes consultant name and project name

2.2 EVALUATION CRITERIA

2.2.1 Firm Background and Experience – 20 Points
Describe your firm’s history. Explain relevant experience particularly with working on projects of similar scope for public entities. Provide information identifying your firm’s strengths and weaknesses along with special capabilities that may be appropriate to this Project that will assist in the evaluation.

2.2.2 Key Personnel – 20 Points
Provide the names of the Project Manager and other key personnel who will be dedicated to this project. Demonstrate their specific experience on projects of similar type, size and scope. Provide specific job experience as it relates to their experience with an FCA. Identify their length of employment with your firm and, if less than three years, recent prior firm(s), their responsibility on this Project, and their primary office locations.

2.2.3 Proposed Project Schedule – 15 Points
Prepare a proposed Project schedule that identifies milestones and duration for each proposed activity.

2.2.4 Safety and Logistics Plan - 10 Points
Provide a proposed safety and logistics plan. Outline proposed time allotment per building and time anticipated for research and compilation of study results.
2.2.5 **Equity and Diversity – 15 Points**
PSU is committed to increasing contract opportunities for Minority, Women and Emerging Small Businesses (MWESB). PSU is seeking qualified firms that demonstrate a commitment to diversity in the workforce and in its contracting practices.

Include a Management Plan for the project as follows: Include your firms plan to increase the diversity of a business’ workforce and to subcontract with or purchase from MWESB firms or businesses that have been historically underrepresented on public contracts. The Management Plan should also include your firms’ nondiscrimination practices, sub-consultant strategy, workforce diversity plan, and outreach plan to increase participation by MWESB firms. The Management Plan, except for any percentage goals to utilize MWESB firms, shall become part of the Agreement.

Identify by name any MWESB sub-consultants, partners, or suppliers that you will utilize on this project team. Please include their specific role on the project. Substitutions of these sub-consultants or suppliers after award shall require PSU approval.

Provide examples of your firms past performance in regards to workforce diversity and sub-consulting plans. Please include number and dollar amount of sub-contracts awarded, and any utilization percentages or other performance indicators.

2.2.6 **Professional Fees – 60 Points**
Provide a total base fee for this Project. The Proposer with the lowest base fee will receive full points, higher cost Proposers will receive proportionally lower points according to the formula: \[
\left(1 - \frac{\text{Proposer's Fee} - \text{Low Proposer's Fee}}{\text{Proposer's Fee}}\right) \times 60 \text{ points}.
\]

2.2.7 **Options – 20 Points**
Provide a fee for each Option. These Options are not to be included in the base fee above.

- Option #1: LEED Assessment and Submission
- Option #2: Add Elevator Study
- Option #3: Broadway Housing Building
- Option #4: Parking Structures

The Optional fees will be scored as follows: \[
\left(1 - \frac{\text{Proposer’s Fee} - \text{Low Proposer’s Fee}}{\text{Proposer’s Fee}}\right) \times 5 \text{ points each}.
\]

2.2.8 **Hourly Rates – 0 Points**
Provide a complete rate schedule for the Proposer and all sub-consultants. These rates shall be utilized for any time and materials amendments to the Agreement and shall be locked for the duration of the project.

2.2.9 **Optional Reference Check – 10 Points**
Provide three (3) professional references from similar projects, including at least one from a University or College, contact name and phone number. Information from references may be utilized for the evaluation of any of the above criteria. References shall only be checked and scored for interviewed firms.

2.2.10 **Optional Interview – 40 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 PROCESS
Proposals will be evaluated by a qualified committee. Evaluation Committee member names will not be announced prior to interviews. The Evaluation Committee will numerically evaluate the responses to the RFP based on the Evaluation Criteria. A Notice of Intent to Award may be released naming the top scoring firm or the highest scoring firms may be selected for final consideration through interviews and further investigation of references.

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Criteria and Points</th>
<th>Evaluated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.2.1</td>
<td>Firm Background and Experience – 20 Points</td>
<td>Selection Committee</td>
</tr>
<tr>
<td>2.2.2</td>
<td>Key Personnel – 20 Points</td>
<td>Selection Committee</td>
</tr>
<tr>
<td>2.2.3</td>
<td>Proposed Project Schedule – 15 Points</td>
<td>Selection Committee</td>
</tr>
<tr>
<td>2.2.4</td>
<td>Safety and Logistics Plan - 10 Points</td>
<td>Selection Committee</td>
</tr>
<tr>
<td>2.2.5</td>
<td>Equity and Diversity – 15 Points</td>
<td>MWESB Committee</td>
</tr>
<tr>
<td>2.2.6</td>
<td>Professional Fees – 60 Points</td>
<td>Calculation</td>
</tr>
<tr>
<td>2.2.7</td>
<td>Options – 20 Points</td>
<td>Calculation</td>
</tr>
<tr>
<td>2.2.8</td>
<td>Hourly Rates – 0 Points</td>
<td>Not Evaluated</td>
</tr>
</tbody>
</table>

Total available for written proposals – 160 points

<table>
<thead>
<tr>
<th>Item</th>
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</tr>
</thead>
<tbody>
<tr>
<td>2.2.9</td>
<td>Optional Reference Check – 10 Points</td>
<td>Selection Committee</td>
</tr>
<tr>
<td>2.2.10</td>
<td>Optional Interview – 40 Points</td>
<td>Selection Committee</td>
</tr>
</tbody>
</table>

Total available for short-listed firms – 50 points

Total possible– 210 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 given to each Proposer using the criteria specified in Section 2.2, items 2.2.1 through 2.2.8.
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 2.2.10.
D. At this point, references shall be checked and scored for interviewed firms. Points will be assigned using the criteria specified in Section 2.1, item 2.2.9.
E. The Proposer with the most cumulative total points (Section 2.2, items 2.2.1 through 2.2.10) shall be issued a Notice of Intent to Award.

END OF SECTION 3
SECTION 4 – APPENDICES

4.1 PSU CONSULTANT TERMS AND CONDITIONS
4.2 SAMPLE CONSULTANT AGREEMENT
4.3 BUILDING INVENTORY
4.4 ELEVATOR INVENTORY
4.5 AIM ANA DATA REQUIREMENTS
4.6 BH CONDITION ASSESSMENT
4.7 BH FUNDING ANALYSIS
4.8 PARKING CONDITION ASSESSMENTS
4.9 PSU CAMPUS MAP