



REQUEST FOR PROPOSALS:
MECHANICAL ENGINEERING SERVICES CONSULTANT

Issue Date: Friday, May 31, 2019

Due Date: Tuesday, Jun 18, 2019

In order to be considered, proposals must be signed and returned via email to oleon@wested.org.

Hard copies may be mailed to the WestEd Procurement Department at 4665 Lampson Ave., Los Alamitos, CA 90720 by (Tuesday, June 18, 2019).

Proposal responses will be considered valid for a period of 120 calendar days after the proposal due date.



RFP - MECHANICAL ENGINEERING SERVICES CONSULTANT

TABLE OF CONTENTS

I.	INTRODUCTION	1
II.	BACKGROUND	1
III.	WESTED CONTACT	2
IV.	SOLICITATION KEY DATES AND TIMELINE	2
V.	SOLICITATION FORM	3
VI.	SCOPE OF WORK	4
VII.	PROPOSAL OUTLINE	7
VIII.	PROPOSAL SUBMISSION AND SELECTION PROCESS	9
IX.	REVIEW PROCESS	9
X.	NOTICE TO FIRM(S)	10
XI.	REJECTION OF PROPOSAL(S)	10
XII.	USE OF SEPARATE CONSULTANTS/CONTRACTORS & SUBCONSULTANTS FOR PORTIONS OF SERVICES	11
XIII.	COMPLIANCE WITH LAWS	11
XIV.	WRITTEN QUESTIONS AND ADDENDA	11
XV.	SUBMISSION	12
XVI.	PROTESTS	12
XVII.	GENERAL PROVISIONS	12

I. INTRODUCTION

WestEd is soliciting proposals from qualified firms to provide mechanical engineering services.

This request for proposal (RFP) contains background information on WestEd and specific information that must be included in the proposals submitted. An electronic version of the proposal must be received no later June 18, 2019.

Electronic copies must be delivered via email to oleon@wested.org. If necessary, physical copies may be delivered directly to our office at the following address:

WestEd
4665 Lampson Ave.
Los Alamitos, CA 90720
Attn: Oscar Leon, Procurement Manager

II. BACKGROUND

WestEd is a not-for-profit research, development, and service agency that works with education and other communities to promote excellence, achieve equity, and improve learning for children, youth, and adults. WestEd has over 700 employees, located in 16 offices across the United States, and had revenue of \$167 million for Fiscal Year 2018.

WestEd is a Joint Powers Agency (“JPA”) formed under the California Joint Exercise of Powers Act, California Government Code section 6500 et seq. and governed by public entities in Arizona, California, Nevada, and Utah. WestEd’s Board of Directors is comprised of members representing agencies from these states, as well as other national education and business leaders. WestEd’s income is tax exempt under Section 115 (1) of the Internal Revenue Code.

WestEd complies with the required federal regulations on procurement, as well as applicable State procurement law and procedures.

Efforts, including affirmative steps prescribed by federal regulation (if applicable), will be made by WestEd to utilize small and minority-owned businesses, women’s business enterprises and labor surplus area firms when possible. The selected firm may be required to undertake affirmative steps to utilize such firms in subcontracts if this contract is federally funded. A firm qualifies as a small business firm if it meets the definition of “small business” as established by the Small Business Administration (13 CFR 121.201, Subsector 541330) by having average annual receipts for the last three fiscal years not exceeding \$15 million.

III. WESTED CONTACT

All communications, including any requests for clarification, concerning this RFP should be addressed in writing to the following:

Oscar Leon
 Procurement Manager
oleon@wested.org

IV. SOLICITATION KEY DATES AND TIMELINE

RFP Activity	Dates
RFP Released	Friday, May 31, 2019
Questions Due by bidders	Wednesday, June 12 th , 2019
Response to questions posted	Friday, June 14 th , 2019
Proposal Due Date	Tuesday, June 18 th , 2019
730 Harrison HVAC Walkthrough (optional)	10:00 am on Tuesday, June 11 th , 2019
Target Award Notice	Friday, June 21 st , 2019
Target meeting with Firm to commence work	Monday, June 24 th , 2019

V. SOLICITATION FORM

FAILURE TO SIGN THIS PAGE WILL DISQUALIFY YOUR RESPONSE

If awarded, the undersigned offers and agrees to furnish the services listed in this RFP at the prices and terms stated, subject to mutually agreed upon terms and conditions. Additionally, the undersigned warrants and represents their authority to bind the firm into an agreement subject to the terms and conditions of this Request for Proposal.

Company Name:

Street Address:

City, State Zip:

Email:

Telephone:

By (Authorized Signature)	Date Signed:
Print name and title of Authorized Signatory	

ALL SPECIFICATIONS, TERMS, AND CONDITIONS OF THIS PROPOSAL WILL BE INCORPORATED INTO ANY RESULTING AGREEMENT.

VI. SCOPE OF WORK

WestEd requests information on Firm's qualification and fee structure for mechanical engineering services and a proposal related to the replacement of WestEd's original 800 GPM cooling tower located at 730 Harrison Street, San Francisco, CA. The successful bidder may be retained for 5 years as a result of this procurement process.

Mechanical, electrical, and plumbing engineering services are sought by a Consulting Engineer or Engineering team. Such services will include:

1. Conducting assessments of existing systems, including evaluations of energy efficiency opportunities.
2. Preparing design and contract documents for remodeling and construction work and providing inspection of that work during construction.

WestEd anticipates that the consultant selected will provide services on a continuing basis related to projects at various stages from pre-design to post-construction. The consultant shall provide engineering services meeting all standards and codes used in design for basic services. An agreement will be negotiated for one-year service with conditions for annual extensions of services outlined up to a total of 5 years.

The Consultant being selected through this Request for Proposal process shall (as relevant to the Project):

1. Review existing floor plans, and actual conditions, and advise WestEd on issues of concern in regard to design, material selection, cost estimation as well as cost (life-cycle) analysis.
2. Provide schematic and design development for mechanical, electrical, and plumbing (MEP) bid documents, and a detailed cost estimate at each phase, which may include:
 - a. Attend coordination meetings
 - b. Provide progress prints/cost estimates (labor and materials) at appropriate intervals
 - c. Include elevations of exposed mechanical or electrical units, and/or three-dimensional renderings (as requested)
 - d. Provide architectural design drawings which shall include all components and accessories
3. Assist in the bidding phases:
 - a. Attend pre-bid and pre-construction meetings
 - b. Answer questions/clarifications during bidding
 - c. Review and evaluate submittals and claims for extra costs.

- d. Inspect the construction site and actively participate in on-site construction meetings as needed. Advise WestEd regarding interpretations of contract documents and payments to contractors when requested.
4. Conduct and assist WestEd for substantial completion by preparing a punch list and conducting a final inspection.

Detail/Phases

Pre-Design Evaluation

Consult with WestEd and other necessary and appropriate government units, utilities, organizations, and persons in order to ascertain project requirements and review the proposal prepared by WestEd, recommending any necessary revisions.

Cost Estimating / Condition Survey and Report

Investigate, analyze, and measure the existing facilities to the extent necessary to determine the information necessary for project work. Measure and verify floor plans and equipment locations in the existing building. Review existing system replacement studies (if applicable), analyze building components, heating/cooling load requirements, WestEd floor plans and drawings (as available) and make system recommendations. Prepare drawings and a report summarizing existing facilities, their condition, and their effect on the Project or the Project's effect on them.

Prepare probable construction cost estimates to assist WestEd in the preparation of Capital Improvement Funding requests. As part of the investigation, identify and document issues pertaining to a future project (accessibility, operations impact, etc.) to inform the project schedule.

Schematic Design and Development

Upon receipt of written notification to proceed, prepare schematic designs for review and approval by WestEd. The schematic drawings shall show project design features. A detailed cost estimate separating labor and materials shall accompany the schematic drawings for each design option developed. Life-cycle cost estimates to be provided upon request. Advancement to next design phase pending WestEd review of report, comments and approval to proceed.

Provide architectural design drawings which shall include all components and accessories, including system elevations (when applicable) in relation to project. Prepare a list of all permits, licenses, review, and approvals as required.

Contract Documents

Perform the final design and the preparation of detailed contract documents in accordance with applicable City, County, State, and Federal regulations (“codes”) for all elements of work including architectural plans, custom details, phasing plans and structural and/or engineering modifications, as needed. Provide design progress reviews with WestEd and other authorities as required (typically at 50% and 95% completion). Provide progress prints, specifications and revised cost estimates at specified intervals for WestEd’s review and approval.

Construction Administration

Attend a preconstruction conference. Such preconstruction conference shall include at least the Consultant, or its authorized representative, the contractor(s), authorized representatives of WestEd, as well as representatives of any other public or private agencies which WestEd determines should be in attendance. At the preconstruction conference, the Consultant shall:

1. Observe that all necessary permits and licenses have been obtained prior to work commencement.
2. Raise for discussion and decision, the manner in which the construction will be administered, the scheduling of construction, and any and all other issues or questions which in the opinion of the Consultant or WestEd must be settled before the start of construction
3. Make visits to the job site for the purpose of clarifying or interpreting any phase of the work and monitoring job progress, where necessary and/or requested. Attend on-the-job field meetings (at a frequency dictated by specific project) to review procedures, progress, scheduling, contractor compliance and other issues.
4. Furnish to WestEd, based on marked up prints, drawings and other data furnished by the contractor, a set of reproducible drawings showing all construction (elements/systems) as actually built.

Initial 2019 Project Description

WestEd needs to replace the original 800 GPM cooling tower which is well beyond its design life. The location of the cooling tower is at WestEd’s headquarters located at 730 Harrison Street in San Francisco. This facility is a six-story commercial office building consisting of approximately 76,000 square feet with approximately 30,000 square feet of parking across four split-level floors in a subterranean parking garage.

The base building cooling plant consists of original 1990 floor-by-floor water-cooled air condition 40-ton units. The units are served by the central condenser water system

consisting of the original cooling tower, water pump and chemical treatment system located on the rooftop.

The base building heating plan consists of two indoor floor mounted gas fire boilers. Each boiler is sized at 1250 MBH heating capacity, 1 heating hot water pump and expansion tank. The hot water loop consists of constant volume pumping configuration with no variable speed control. The building uses VAV boxes with hot water reheat coils serving primarily the exterior zones.

Building ventilation utilizes one outside air fan with hot water pre-heat coil located in the penthouse to provide outside air to each of the floor-by-floor air conditioning units. Each floor has pneumatic type variable air volume (VAV) boxes for interior zones and VAV boxes with hot water re-heat coils for exterior zones, medium/low pressure ductwork and air outlets.

Controls are pneumatic served by air compressors (duplex, five HP each) and an air dryer.

VII. PROPOSAL OUTLINE

In order to simplify the review process and to obtain the maximum degree of comparability, the proposals should include the following items and be organized in the manner specified below.

1. Letter of Transmittal

A letter of transmittal briefly outlining the firm's understanding of the work and general information regarding the firm and individuals to be involved is limited to a maximum of two pages. The letter should clearly identify the local address of the office of the firm performing the work, the telephone number, and the name of the authorized representative. The letter shall include a clear statement from Proposer that this offer is binding and shall remain open for 120 days from the due date of this RFP and acknowledges that its proposal cannot be withdrawn within that time without the written consent of WestEd.

2. Table of Contents

Include a table of contents that identifies the material by section, page number, and a reference to the information to be contained in the proposal.

3. Solicitation Form

The Solicitation Form included in the RFP shall be included here.

4. Profile of Firm Proposing

- a. State whether the firm is a local, national, or international firm and include a brief description of the size of the firm. State whether the proposer is a qualified small or minority-owned business, women's business enterprise or labor surplus area firm.
- b. State whether the firm is in compliance with the registration and permit requirements to do business in California.
 1. Describe the local office from which the work is to be performed.
 2. Location of office.
 3. Current size of the office.
 4. The size of professional staff by level, such as partner, manager and supervisor, senior, and other professional staff.
 5. The credentials and qualifications of professional staff.

5. Qualifications

Describe recent experience with similar engagements to which the proposal relates.

- a. Include resumes of all key professional members who will be assigned to the project. Résumés should be included for all professional members of the team. The résumés should include specific engagements or clients to whom similar services have been provided if possible.
- b. Describe the firm's policy on notification of changes in key personnel.
- c. Briefly describe the firm's system of quality control to ensure the work meets a high quality standard.
- d. Include three client references.

6. Scope of Services and Proposed Project Schedule

Briefly describe the firm's understanding of the scope of services to be provided.

7. Fees and Compensation

Provide the following information as relevant to the fee proposal:

- a. Estimated total hours for each phase of services called out in Section VI.
- b. Estimated out-of-pocket expenses.
- c. The hourly rate by staff classification.
- d. The frequency and timing of the firm's billing process.
- e. Cost of additional related services if requested by WestEd and offered by Consultant by not contemplated in this Request for Proposals.

If the fee is proposed under a different methodology (e.g., a fixed price for all services) please provide a basis for the proposed fee.

8. Exceptions to RFP Requirements

Any exceptions to the requirements of this RFP shall be noted in the proposal. WestEd shall have no obligation to accept any exceptions and may reject any proposal noting exceptions to its RFP requirements.

VIII. PROPOSAL SUBMISSION AND SELECTION PROCESS

By use of numerical and narrative scoring techniques, proposals will be evaluated by WestEd against the factors specified below. The relative weights of the criteria—based on a 100-point scale—are shown below.

Criteria	Points
1. Qualifications, experience, references, and ability to carry out the described work	35 points
2. Proposed methodologies and processes to accomplish work	25 points
3. Fees / expenses	25 points
4. Other factors, including completeness of proposal, adherence to RFP instructions, other relevant factors not considered elsewhere	15 points

IX. REVIEW PROCESS

WestEd may, at its discretion, request interviews/presentations by or a meeting with any or all firms, to clarify or negotiate modifications to the firm’s proposal. However, WestEd reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the firm can propose. WestEd contemplates award of the contract to the responsive, responsible firm whose proposal is the most advantageous to WestEd, based on the highest total points and its decision is final.

As a federal contractor, it is WestEd’s policy to utilize, whenever possible, small businesses, disadvantaged small businesses, veteran-owned small businesses, minority-owned firms, and/or woman-owned businesses. Therefore, firms that meet these criteria will be given preference, should they meet all other stated criteria in the RFP.

X. NOTICE TO FIRM(S)

All materials provided to WestEd become the property of WestEd and may be returned only at its sole discretion. WestEd is a public entity. All proposals and any materials submitted with a proposal may be deemed public records subject to disclosure pursuant to the California Public Records Act. No portion of any proposal or materials submitted therewith will be withheld from disclosure as proprietary, trade secret or confidential unless that portion is clearly marked by the firm as such, and the firm agrees to indemnify WestEd against any claim or action to compel disclosure of such portion of the proposal. WestEd is not obligated to accept any proposal or to negotiate with any entity. All transactions are subject to the final approval of WestEd, which reserves the right to reject any and all proposals without liability. All costs directly or indirectly related to a response to this RFP will be borne by the firm.

The contract, if any, shall be awarded to the responsible firm whose proposal is most advantageous to WestEd, based on the evaluation criteria set forth in this RFP. WestEd may at its sole discretion select the response that best fits its needs, may choose to cancel the RFP, or to not select any Firm. A selection committee will evaluate the responses based on established criteria, including compliance with the direction herein, experience and qualifications, cost, financial position of the company, and other factors as stated in this RFP. If selected, the successful firm will enter into a written agreement with WestEd that will include service agreements and compensation agreements.

All information in this RFP should, for purposes of this RFP, be considered proprietary and confidential. Information contained in this RFP should not be shared or distributed without the expressed written consent of WestEd.

XI. REJECTION OF PROPOSAL(S)

WestEd reserves the right in its sole discretion to reject any or all proposals, in whole or in part, without incurring any cost or liability whatsoever. All proposals will be reviewed for completeness of the submission requirements. The proposal may be rejected if it fails to meet a material requirement of the RFP or if it is incomplete or contains irregularities. A deviation is material to the extent that a proposal is not in substantial accord with RFP requirements.

Immaterial deviations may cause a bid to be rejected. WestEd may or may not waive an immaterial deviation or defect in a proposal. WestEd's waiver of an immaterial deviation or defect will in no way modify the RFP or excuse a firm from full compliance with the RFP requirements.

Any proposal may be rejected where it is determined to be not competitive, or where the cost is not reasonable.

Proposals that contain false or misleading statements may be rejected if in WestEd's opinion the information was intended to mislead WestEd regarding a requirement of the RFP.

WestEd may reject a proposal from a firm it finds non-responsible. Any person or entity that has substantially assisted WestEd in preparing any part of this RFP is prohibited from submitting a proposal. Submission of a proposal to WestEd shall constitute the firm's certification that the proposal is not collusive.

XII. USE OF SEPARATE CONSULTANTS/CONTRACTORS & SUBCONSULTANTS FOR PORTIONS OF SERVICES

WestEd reserves the right to award all or only a portion of the work/scope of services that is the subject of this RFP to the successful proposer. This includes the right to award one or more portions of the services to a separate contractor if WestEd deems such award to be most advantageous to WestEd in its sole discretion. WestEd further reserves the right to review, approve, and/or reject any proposed subconsultants and/or subcontractors proposed by any proposer if deemed to be in the best interest of WestEd. Proposers acknowledge that if WestEd elects to award any such separate or independent contract the successful proposer shall coordinate its work with such separate contractors as directed by WestEd.

XIII. COMPLIANCE WITH LAWS

Any Firm must affirmatively agree and certify that it will comply with all applicable federal, state, and local laws and regulations, including but not limited to the provisions of the Fair Employment and Housing Act (Govt. Code, § 12900 et seq.) and any applicable regulations promulgated there under (Cal. Code of Regs., tit. 2, § 72850.0 et seq.). Any Firm must affirmatively agree to include the non-discrimination and compliance provisions of this clause in any and all subcontracts to perform work under the agreement.

XIV. WRITTEN QUESTIONS AND ADDENDA

Written questions or comments regarding this RFP must be in writing and received no later than June 12th, 2019. Questions should be emailed to the Procurement Manager at oleon@wested.org. All questions will be responded to via email. Firm(s) invited to submit proposal understand and agree that they have an affirmative duty to inquire and seek clarification regarding anything in this RFP that is unclear or open to more than one interpretation.

WestEd, at its sole discretion, may make questions submitted by Firms and responses to the submitted questions available to all Firms.

WestEd reserves the right in its sole discretion to revise or amend this RFP prior to the stated submittal deadline. Any such revisions will be made by written addenda to this RFP. Firms are responsible for verifying they have received, and all proposals shall acknowledge receipt of, all addenda issued by WestEd relating to this RFP. Failure to acknowledge receipt of all such addenda may render a proposal nonresponsive.

XV. SUBMISSION

Electronic copies of responses must be received by June 18th, 2019. Any response received after this date may be returned or not considered. Responses should be submitted electronically to the Procurement Manager at oleon@wested.org. If Firms wish to also submit a hard copy of the proposal, it needs to be postmarked no later than the due date and mailed to 4665 Lampson Ave., Los Alamitos, CA 90720; Attn: Oscar Leon. Submission of a proposal shall constitute the firm's representation that it:

- Has thoroughly examined and become familiar with the scope of work set forth in this RFP;
- Understands the requirements of the scope of work, the nature of the work and all other matters that may affect the work;
- Will honor its proposal for no less than 90 days after the submission date stated in this RFP (or until execution of a final contract with the selected firm, if sooner), and acknowledges that its proposal cannot be withdrawn within that time without the written consent of WestEd;
- Will comply with all requirements set forth in this RFP, and in the ensuing contract, if any.

XVI. PROTESTS

Following the selection of the apparent successful firm, WestEd shall notify all firms of its intent to award a contract to such firm. Any protest to the award of the contract to the apparent successful firm shall be submitted to WestEd in writing within no less than five (5) calendar days from the date of such notice. Any protest shall state with specificity the ground on which the protestor alleges the contract may not be awarded to the apparent successful firm. WestEd shall consider any properly submitted protest and may accept or reject such protest as it determines appropriate in its sole discretion.

XVII. GENERAL PROVISIONS

- A. Amendments to RFP. WestEd reserves the right to amend the RFP or issue to all Respondents a Notice of Amendment to answer questions for clarification.

- B. No Commitment to Award. Issuance of this RFP and receipt of proposals does not commit WestEd to award a contract. WestEd expressly reserves the right to postpone the RFP process for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one Respondent concurrently, or to cancel all or part of this RFP.
- C. Amendments to Proposals. No amendment, addendum or modification will be accepted after the deadline stated herein for receiving Proposals. Respondent may modify or amend its Proposal only if WestEd receives the amendment prior to the deadline stated herein for receiving Proposals.
- D. Non-Responsive Proposals. A Proposal may be considered non-responsive if conditional, incomplete, or if it contains alterations of form, additions not called for, or other irregularities that may constitute a material change to the Proposal.
- E. Late Proposals. WestEd will not be responsible for Proposals that are delinquent, lost, incorrectly marked, sent to an address other than that given herein, or sent by mail or courier service and not signed for or acknowledged by WestEd.
- F. Costs for Preparing. WestEd will not compensate any Respondent for the cost of preparing any Proposal, and all materials submitted with a Proposal shall become the property of WestEd. WestEd will retain all Proposals submitted and may use any idea in a Proposal regardless of whether that Proposal is selected.
- G. Alternative Proposals. Only one final proposal is to be submitted by each Firm. Multiple proposals will result in rejection of all proposals submitted by the Respondent.
- H. Public Documents. All Proposals and all evaluation and/or scoring sheets shall be available for public inspection at the conclusion of the selection process.