

**University of California,
Santa Barbara**



Request
for
Qualifications
Number:

FM180016

for the

**Multiple Building
Heating System
Improvements Project**

Office of Design and
Construction Services

August 2017



**University of California, Santa Barbara
Multiple Building Heating System Improvements Project**

RFQ No. FM180016

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EXHIBITS:

Statement of Qualifications Form	See UCSB website for download at: http://web.facilities.ucsb.edu/contracts/
Professional Services Agreement	(See hyperlink above for separate .pdf file)
Executive Design Professional Agreement	(See hyperlink above for separate .pdf file)
Certificate of Insurance	(See hyperlink above for separate .pdf file)



ADVERTISEMENT

Project Name: Multiple Building Heating System Improvements Project

Project/RFQ No: FM180016

Project Description: Qualifications are hereby solicited from Design Professionals interested in providing master planning and design services for the Multiple Building Heating System Improvements Project.

The UCSB Multiple Building Heating System Improvements Project will replace existing natural gas boilers of varying age, capacity and configuration with emissions-compliant heating systems. The project includes upgrading approximately 24 existing natural gas boilers at 16 buildings to emissions-compliant heating systems.

Basis of design for each heating plan will include one of two scenarios. Scenario A will be SBAPCD Rule 361 compliant natural gas boilers. In addition, pre-design work will include feasibility analysis and life cycle cost assessment of replacement of existing boiler systems with electric water-source heat pump systems (Scenario B). Scenario B applies to eight of sixteen facilities within the scope of work that are connected to the UCSB campus chilled water loop system.

Major project milestones are completion of preliminary and final designs and equipment specifications by June, 2018, and construction and commissioning completion by December, 2019. Estimated construction cost: \$5,000,000 - \$7,000,000.

Scope of Services

Work will be authorized in two stages. The first stage ("Stage 1") will be conducted under a Professional Services Agreement ("PSA") for the development of Detailed Project Program (DPP), including conceptual designs and detailed cost estimates. The programming and planning effort will then seek to identify stakeholders' priority needs, verify project scope and produce a program document. The successful consultant(s) will need to identify the cost for each project component to assist the University in establishing its requirements and an affordable scope. Stage 1 services may also include, but are not limited to general evaluation of existing conditions, identification of current and future site constraints, project programming, adjacency studies, concept design, and cost estimating.

Note, the project planning phase at the University is highly collaborative and consensus on recommended plans will be required between various University departments and stakeholders.

The second stage ("Stage 2") of each project, if authorized, will be conducted under the University's Executive Design Professional Agreement ("EDPA") for, among other services, engineering design, preparation of construction documents, support services during the administrative and environmental approval process, bidding assistance, construction phase administrative services and surveys.

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Authorization to proceed with Stage 2 will be contingent upon satisfactory completion of Stage 1, University project approvals, and the appropriation of adequate funding. While it is anticipated that funding will be obtained, there is no assurance that funds will be received for the anticipated projects.

Site investigation, pre-design analysis and design work to be performed as directed by the University's Representative and in coordination with the construction contract schedule.

Types of Services: Heating hot water system investigation, facility hot water temperature modeling/testing, life cycle cost assessment, heating plant design. Services may also include, but not be limited to, the following tasks:

- Systems investigation and design coordination with UCSB operations staff
- Evaluation of water-source heat pump systems (return side of campus chilled water loop), where applicable
- Identification of most effective phasing plan to reduce interruption to building heating systems to extent feasible
- Construction administration.

General Instructions

Mechanical engineering consultant(s) with qualifications that include experience in providing similar services are encouraged to respond. A current and valid Registered Professional Engineering license is required. A copy of the Request for Qualifications form will be available on the University's website at: <http://www.facilities.ucsb.edu/departments/contracting-services/consultantsdesigners> (click Request for Qualifications>>click the appropriate project button>>download the project documents) or call Steve Eggemeyer (805) 893-7193 for assistance securing the RFQ documents, further information regarding the project requirements, or additional technical information.

Consultant selection will follow the University of California qualifications-based selection procedures. The selection criteria for this project will be detailed in the Request for Qualifications.

Interested firms shall deliver three (3) hardcopy sets and one (1) digital copy (.pdf) of their consultant team's submittal to UCSB by 4:00 p.m. on **August 16, 2017** to the following address:

Attn: Greg Moore, Assoc. Director
Facilities Management Bldg. 439, Room 'E'
University of California, Santa Barbara
Santa Barbara, CA 93106-1030

Affirmative Action Statement

Each candidate firm will be required to show evidence of its equal employment opportunity policy. Every effort will be made to ensure that all persons shall have equal access to contracts and other business opportunities with the University, regardless of: race; color; religion; sex; age; ancestry; national origin; sexual orientation; physical or mental disability; veteran's status; medical condition; genetic information; marital status; gender identity; pregnancy; service in the uniformed services; or citizenship within the limits imposed by law or University's policy.

(Advertisement Posted 8/02/17)



PROGRAM STATEMENT

The UCSB Multiple Building Heating System Improvements Project will replace existing natural gas boilers of varying age, capacity and configuration with emissions-compliant heating systems. The project includes upgrading approximately 24 existing natural gas boilers at 16 buildings to emissions-compliant heating systems.

Basis of design for each heating plan will include one of two scenarios:

Scenario A will be SBAPCD Rule 361 compliant natural gas boilers. In addition, pre-design work will include feasibility analysis and life cycle cost assessment of replacement of existing boiler systems with electric water-source heat pump systems (Scenario B).

Scenario B will be replacement of existing boiler systems with electric water-source heat pump systems. Scenario B applies to eight of sixteen facilities within the scope of work that are connected to the UCSB campus chilled water loop system.

Major project milestones are completion of schematic, design development and construction documents and equipment specifications by June, 2018, and construction and commissioning completion by December, 2019.

Estimated construction cost: \$5,000,000 - \$7,000,000.

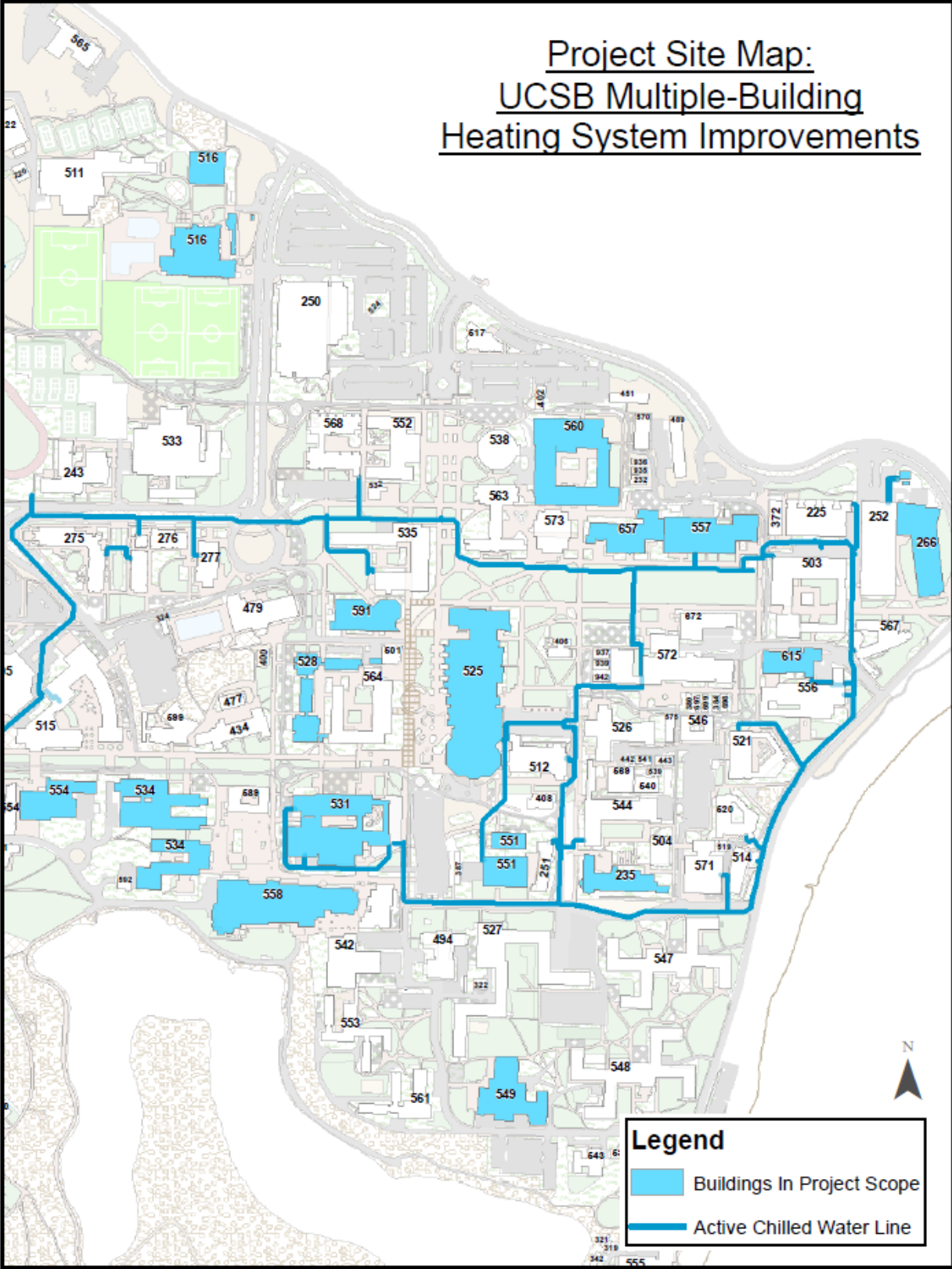


SCOPE OF SERVICES

Site investigation, planning, design and construction oversight is to be performed as directed by the University's Representative and in coordination with the construction contract schedule.

Types of Services: Heating hot water system investigation for all 16 buildings in scope, facility hot water temperature modeling/testing, life cycle cost assessment, heating plant design. Services may also include, but not be limited to, the following tasks:

- Systems investigation and design coordination with UCSB operations staff
- Evaluation of water-source heat pump systems, where applicable
- Identification of most effective phasing plan to reduce interruption to building heating systems to extent feasible
- Construction administration.



PROJECT SCHEDULE*

Advertise Request for Qualifications	August 2, 2017
SOQ Submittal Due at UCSB by 4:00 p.m.	August 16, 2017
Screening Committee/Selection of Short-listed firms	August 21, 2017
<i>The selected short-listed firms will be posted on the UCSB Design, Construction, & Physical Facilities website, on the project page under "Request for Qualifications."</i>	
Notify Selected Firms of Shortlisting	August 23, 2017
Firm Interviews, if deemed necessary	August 28 th – September 7 th
Successful Candidate Notified	September 12, 2017
<i>*The anticipated project schedule is tentative and subject to change by the University.</i>	
Fee Negotiations	September 2017
Contract Award/Project Kickoff	October 2017



INSTRUCTIONS TO APPLICANTS

1. Respond concisely to the Selection Criteria and complete the Statement of Qualifications Form. A list of projects of similar scope, complexity, and cost will be essential to a successful application. The Statement of Qualifications must be signed by a responsible member of the firm applying for the project.
2. Provide a list of projects of similar scope and complexity along with team member's roles, experience, qualifications and expertise. Please also address the scheduled duration of construction and other relevant project statistics. Comparable characteristics of each project and a contact person with a telephone number for each listed project.
3. Your submittal shall also address the following:
Cost Control and Scheduling – What mechanism or procedures will the team implement to control costs?

Professional Services Agreement – Note any exceptions to the enclosed Professional Services Agreement that would prevent your firm from executing the Agreement. The University cannot accept any request to include language to limit liability with regards to insurance and/or modify the indemnification clauses. Submittals shall include a separate letter affirming the intent of the proposer's acceptance of terms and conditions contained in the Agreement (see enclosed Agreement). Provide a copy of your current billing rate schedule and proposed consultants.

Executive Design Professional Agreement – Confirm your firm's intention to abide by the terms included in the attached Executive Design Professional Agreement ("EDPA"). Proposal submittals shall include a separate letter affirming the intent of the proposer's acceptance of terms and conditions contained in the Agreement. Note any exceptions to the EDPA that would prevent your firm from executing the Agreement. The University cannot accept any request to include language to limit liability with regards to insurance and/or modify the indemnification clauses.

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Certificate of Insurance – Note any exception to the Certificate requirements and provisions that would prevent your firm from executing an Agreement. Submittals shall include a separate letter affirming the intent of the proposer’s acceptance of terms and conditions contained in the Certificate of Insurance (see enclosed certificate). Minimum Insurance limits are as follows:

General Liability:	Amount
Comprehensive or Commercial Form	
Each Occurrence	\$1,000,000
Products/Completed Operations Aggregate	\$2,000,000
Personal and Advertising Injury	\$1,000,000
General Aggregate	\$2,000,000
Business Automobile Liability	Amount
Each Occurrence	\$1,000,000
Workers’ Compensation	as required under California State Law
Professional Liability	Amount
Each Occurrence	\$1,000,000
Project Aggregate	\$1,000,000

Individual Experience – Submit resumes of the each team member, including the Project Manager, Principal and technical consultants focusing on relevant experience of those individuals (not the collective corporate experience of the firm).

Work Location – Identify any portions of the scope of work that will be performed outside of the office responding to the RFQ and the individuals responsible for that work.

4. Include supplementary information supporting qualifications (8 ½ x 11 format), including Professional Engineering licenses, if applicable. Organization and brevity will be appreciated. Work submitted as an example of the consultant’s qualifications will be considered only to the extent it is similar to the proposed project. Additional information may be submitted demonstrating relevant experience. Provide information on proposed staff and consultants for this project and an organization chart. Provide a list of previous projects the proposed team has participated in together as a team.

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5. Return SOQ submittal to: Greg Moore, Associate Director
Facilities Mgmt., Building 439, Room 'E
University of California, Santa Barbara
Santa Barbara, CA 93106-1030
6. Submittal(s): Submit three (3) copies of all material bound into single documents and one (1) digital copy (.pdf) of each consultant team's submittal package.
7. SOQ Submittal Deadline: **August 16, 2017** no later than 4:00 p.m.
8. Consultants with qualifications considered appropriate by the Screening Committee may, at the sole discretion of the University, be asked to interview with the Selection Committee.



SELECTION CRITERIA

1. ***Professional ability;*** Ability as it can be evaluated by examination of the functional and technical qualities of work successfully completed on comparable for the University or other clients.
2. ***Program responsiveness;*** Previous experience that demonstrates success in completing projects consistent with similar technical requirements, which indicates the ability to complete the proposed project in a manner that is responsive to the specifics of the program.
3. ***Evaluation of consultants proposed to be employed;*** Previous experience with special requirements appropriate to the project under consideration with demonstrable evidence that the consulting services can be obtained from the proposed staff, as required.
4. ***Production capability;*** Evidence of ability to perform all phases of the work, to produce work product that is of superior quality.
5. ***Coordination and supervision;*** Evidence of ability to provide experienced staff and timely support.
6. ***Proximity;*** To the Project location, willingness to establish a local office or an association with a local consulting firm.
7. ***Client relationships;*** Recognition of the consultative processes associated with work on a University Campus, public sector owner, or other comparable clients.
8. ***Equal Opportunity;*** The commitment of the University to equal opportunity applies to the selection of design professionals.



PRIVACY NOTIFICATION

The state of California Information Practices Act of 1977 requires the University to provide the following information to individuals who are asked to supply information about themselves:

The principal purpose for requesting the information on this form is for use in the selection process for Design Professionals commissioned by the University. University Policy authorizes maintenance of this information.

Furnishing all information requested on this form is mandatory - failure to provide such information will delay or may even prevent completion of the action for which the form is being filled out. Information furnished on this form will be used by the Office of Design & Construction, Facilities Management, University of California at Santa Barbara in consideration of commissions to Design Professionals.

Individuals have the right to access to this record as it pertains to them.

The official responsible for maintaining the information contained on this form:

Associate Director, Contracting Services
Office of Design & Construction Services and
Physical Facilities, Building 439, Room 'E'
University of California, Santa Barbara
Santa Barbara, California 93106-1030