Request for Qualifications
for Master Agreement

ON-CALL MECHANICAL ENGINEERING SERVICES

Submittal Deadline: June 2, 2017 at 3:00 p.m.

The University of Washington is soliciting Statements of Qualifications (SOQ) from engineering firms to provide on-call professional and mechanical engineering design services for Capital Planning & Development (CPD) and for other programs, departments, and locations at the University of Washington.

**Master Agreement:** The University intends to select one or more firms under on-call Master Agreements that will have no specific scope of work or contract amount. As individual projects arise, the parties will negotiate the scope of work and fee and formalize it in a project authorization. Project authorizations under each Master Agreement must be executed prior to the expiration of the Master Agreement. Design Basic Services authorizations will be limited to those with a total project budget (including design, construction, contingency, and other costs) of less than $2 million. Over the life of each Master Agreement, the aggregated total project budgets for all authorized design projects under the Master Agreement will be an amount up to $5 million. The initial term of each Master Agreement will be two years with an option for the University, with the firm’s concurrence, to extend the Agreement by amendment for up to two additional years (for a maximum of four years). Hourly rates established for each Master Agreement will remain in effect for the initial two year term of the Master Agreement. Upon request of the consultant the hourly rates will be subject to renegotiation for the optional term(s), and new rates, if approved, shall be authorized by an amendment to the Master Agreement.
**Scope of Services:** The services under the Master Agreement may include, but are not limited to, the following: design, preparation of bid documents and construction administration for HVAC modifications, building mechanical systems, utility systems such as steam boilers, steam distribution, chillers, cooling towers, chilled water distribution systems, commercial freezers, and the preparation of early project studies to assist the University in selection of projects. Drawings may be prepared for various delivery methods, public bid, job order contracting and facilities maintenance.

The selected firm(s) will work under the direction of CPD and/or Facilities Maintenance & Construction, and will work with Campus Engineering & Operations, Environmental Health and Safety, UW Information Technology, and other campus entities, as appropriate.

**Submittal Requirements and Evaluation Criteria:** The SOQ must include and will be evaluated based on the following criteria. Each firm’s SOQ must include an index and be organized by discrete sections corresponding to the criteria and in the same order as listed below. The SOQ shall not exceed thirty (30) page sides, except that the cover letter, section tabs/dividers, and resumes are not included in this page limit. The font used for the SOQ and resumes must be no smaller than 10 pt for text and 8 pt for captions.

1) **Cover Letter:** A cover letter expressing interest in providing on-call services, addressing, at a minimum, the following:

   A. A high level summary of your firm’s relevant qualifications, including a summary of relevant expertise, experience, and practice.

   B. Acknowledge that you have reviewed any addenda issued to the RFQ, as posted at [http://cpd.uw.edu/cpo/business/consult-opp](http://cpd.uw.edu/cpo/business/consult-opp).

   C. Outline the size and organization of your firm and discuss your capability to successfully manage and complete a project of the indicated size and scope.
within the identified schedule and budget, relative to your expertise and other workload.

D. Identify the office location(s) that will manage and administer this project, as well as the office that will develop the design and construction documents.

E. The name and contact information of the individual in your firm that the University should contact regarding questions about your SOQ and scheduling a potential interview. The contact information should include the following: name of individual, title (Mr., Ms., etc.), firm name, address (city, state, zip code), telephone number, and e-mail address.

2) Relevant Experience of the Firm: Demonstrated expertise and experience of the firm in completing similar size projects with durations of a few days to a few months that were completed over the last ten years, and that demonstrate your staff’s expertise and experience in all aspects of engineering consulting for mechanical system selection and sizing through design, construction and startup. Examples may be working as a prime consultant as well as subconsultant on an architectural project.

As part of the qualifications submitted, include a completed Federal Government GSA Standard Form 330, Part II. The form is available online at: http://www.gsa.gov/portal/forms/download/116486.

3) Ability to Manage Schedule and Budget: Experience and history of successful completion of related projects showing the ability of the staff proposed by your firm to perform the work on this contract to manage schedule and budget throughout the project’s phases, without loss of design outcomes. Provide narratives of projects describing how Target Value Design (or a comparable cost management technique) was used to ensure the design remained within budget, and describe how challenges were overcome. Provide specific recent examples of projects where the
design duration was established, what tools your firm used to monitor progress against that schedule, and how issues were identified and managed. Provide examples of design schedules developed by your firm which show an established baseline, the progress measured against that baseline, and any adjustments made to maintain schedule. Describe how the bid and construction schedules were affected by this design scheduling process. Use of tables listing project initial and final costs is discouraged.

4) **Programming/ Concept Development/Design Expertise Experience:** Demonstrated experience in the preparation of programming, including concept development, and design expertise for relevant public works projects. Provide examples from past projects where the staff proposed to perform the work on this project developed and implemented creative solutions to challenging programming, concept development, and design goals.

5) **Project Management Approach:** Demonstrated expertise of the staff proposed by your firm to work on this contract in the following project management functions: supervision, coordination, collaboration, communication/consensus building, and quality assurance and control related to design documents and project administration. Provide specific recent examples of how the staff proposed to work on this project collaborated in a team environment, including with contractors and trade contractors.

6) **Permitting and Other Regulatory Knowledge:** Knowledge of and experience with the approval and permit processes of the City of Seattle, Bothell and Tacoma or other city/county government agencies, other applicable regulatory agencies, and with the administrative review processes and requirements relevant to any project authorized under the Master Agreement.
7) **Staff Experience and Availability:** A description of the relevant qualifications and expertise of the proposed staff. Describe work done on projects delivered in a similar on-call collaborative environment. Include a copy of the resume for each proposed staff member and include a paragraph on each resume showing specific experience relevant to this contract and a paragraph explaining why the individual was selected for this contract.

8) **References:** At least three (3) project owner references for work completed by the project manager and lead designer. References should be selected from projects prominent in your SOQ. Cited references should include project name, reference name, title, project role, and current contact telephone number. Refer to the References section of this RFQ for information about how reference checks will be used in the evaluation process.

9) **Acceptance of the University’s Standard Agreements:** The University intends to utilize its standard Master Agreement for Engineering Services for design services and its standard Master Agreement for Professional Services for pre-design work. This Agreement is available for review on CPD’s website at: [http://cpd.uw.edu/cpo/business/contracts-forms](http://cpd.uw.edu/cpo/business/contracts-forms). Select the ‘Master Agreement for Engineering Services OA3’ and the ‘Master Agreement for Professional Services OA4’. Each firm must affirm in this section of the SOQ that the terms and conditions of this agreement is acceptable, or if the firm takes exception to any of the proposed language in the agreement, the firm must specifically describe the reasons for the exceptions and propose in this section of the SOQ alternative language for review and consideration by the University. The University makes no commitment that it will modify any of the terms of the standard agreement based on the firm’s suggestions. Firms should not comment on the terms of Attachment A to the Agreement that include compensation provisions. Failure to respond to this item may result in the University eliminating the firm’s SOQ from consideration.
**Weighting of Evaluation Criteria:** The SOQ will be evaluated based on the following points for each evaluation criterion:

<table>
<thead>
<tr>
<th>SOQ Evaluation Criteria</th>
<th>Weighting (Maximum Points)</th>
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<tbody>
<tr>
<td>1 Cover Letter</td>
<td>2</td>
</tr>
<tr>
<td>2 Relevant Experience of the Firm</td>
<td>15</td>
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<tr>
<td>3 Ability to Manage Schedule and Budget</td>
<td>20</td>
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<tr>
<td>4 Programming and Concept Development Experience</td>
<td>8</td>
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<tr>
<td>5 Project Management Approach</td>
<td>10</td>
</tr>
<tr>
<td>6 Permitting and Other Regulatory Knowledge</td>
<td>5</td>
</tr>
<tr>
<td>7 Staff Experience and Availability</td>
<td>40</td>
</tr>
<tr>
<td>8 References</td>
<td>No points</td>
</tr>
<tr>
<td>9 Acceptance of the University’s Standard Agreements</td>
<td>No points</td>
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<tr>
<td><strong>Total Points:</strong></td>
<td><strong>100</strong></td>
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**Submittal Deadline:** One (1) unbound original, three (3) copies organized in removable, recyclable covers, and one (1) USB thumb/flash drive containing a copy in PDF format of the SOQ containing the above-listed information must be received at the University Facilities Building no later than the submittal deadline stated on the first page of this RFQ, or as modified by any subsequent addenda. Submittals sent by mail or courier shall be sent to the address below (use box number for U.S. Postal Service (USPS) delivery only). Faxed or e-mailed submittals will not be accepted. Firms are responsible for ensuring receipt of the SOQ at the University Facilities Building by the deadline stated above, and should take into account internal UW delivery times once USPS delivers a submittal to the box number indicated, and other delays that may occur when using a delivery service. Submittals received after the deadline will not be considered.
Any addenda issued for this RFQ will be published at the following website address: [http://cpd.uw.edu/cpo/current-solicitations](http://cpd.uw.edu/cpo/current-solicitations). Firms are responsible for checking the website for any addenda prior to submission of qualifications. If you are unable to download the addenda, you may contact the individual noted at the end of this RFQ.

**Selection Process:** The SOQ will be scored by an evaluation committee. The committee will use each firm’s SOQ scores solely to determine a shortlist of the highest scoring firms. The scores from this evaluation will not carry through to the interview evaluation. Each shortlisted firm will be invited by letter to an interview. The firms will be evaluated in the interview based on the following points for each interview evaluation criterion listed below:

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<tr>
<th>Interview Evaluation Criteria</th>
<th>Weighting (Maximum Points)</th>
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<tr>
<td>1 Type of Work: The firm’s understanding of, and approach to, the requirements of the type of work included in the Master Agreement.</td>
<td>20</td>
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<tr>
<td>2 Personnel: Relevancy of experience and knowledge of the work of the Master Agreement.</td>
<td>30</td>
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<td>3 Communication: Interpersonal communication between team members and with the interview committee.</td>
<td>25</td>
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<tr>
<td>4 Presentation and Questions: Clarity of expression and thoroughness in the firm’s</td>
<td>25</td>
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The committee will select the shortlisted firm(s) with the highest interview score(s) as the most highly qualified firm(s) to enter into negotiations with the University. If the University and the most highly qualified firm(s) cannot agree on terms that are fair and reasonable, the University may enter into negotiations with the next most highly qualified firm(s). Selection of a firm is anticipated to occur within thirty (30) calendar days following the submittal date.

One or more engineering firms will be selected at this time. Information from sub-consultants should not be included in the SOQ. The University expects to work with the selected firm(s) to finalize the sub-consultant team for each assigned project prior to authorization of work for each assigned project.

**References:** The University reserves the right to conduct reference checks for the highest scoring firm(s) either after qualifications have been evaluated, and/or after interviews have been held. In the event that information obtained from the reference checks reveals concerns about the firm’s past performance or their ability to successfully perform the work of the Master Agreement to be executed based on this RFQ, the University may, at its sole discretion, determine that the firm is not qualified to move forward in the selection process and/or enter into negotiations with the University. In conducting reference checks, the University may include itself as a reference if the firm has performed work for the University, even if the firm did not identify the University as a reference. Likewise, the University reserves the right to check references for the firm from other owners and designers even if they were not identified by the firm as references in the submitted SOQ.
Business Equity: The University of Washington is committed to providing the maximum practicable opportunity for participation in contracting by sbe, dbe, MBE, WBE, and MWBE through direct contracts with the University, and sub-consulting or supplier participation. No minimum level of sbe/dbe/MBE/WBE/MWBE participation, however, shall be required as a condition for receiving an award.

The definitions which follow apply to certain terms set forth in this section of the RFQ.

1. “sbe” means an in-state business, including a sole proprietorship, corporation or other legal entity, that:
   a. certifies, under penalty of perjury that it is owned and operated independently from all other businesses and has either:
      i. Fifty or fewer employees; or
      ii. A gross revenue of less than seven million dollars annually as reported on its state and federal tax returns over the previous three consecutive years; or
   b. is certified with the Office of Minority and Women’s Business Enterprises (OMWBE).

2. “dbe” means any business entity certified with the OMWBE.

3. “MBE” means any state-certified or non-certified business entity that is more than 50% owned and controlled by at least one minority person.

4. “WBE” means any state-certified or non-certified business entity that is more than 50% owned and controlled by at least one non-minority woman.

5. “MWBE” means any state-certified or non-certified business entity that is more than 50% owned and controlled by at least one minority woman. The term “minority” includes a person of Asian, Black, Hispanic and Native American racial or ethnic heritage.

Questions: All questions regarding this RFQ should be addressed to Mark Miller, Manager, Design Services at (206) 221-3959, or by e-mail at mkmiller@uw.edu.