

Request for Professional Qualifications
Information Package

Strategic Energy Plan Monitoring Based Commissioning Services

Project No. 12401
University of California, Berkeley

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- Project Process Flow Chart

University of California, Berkeley
Capital Projects
February 2009

STRATEGIC ENERGY PLAN MONITORING-BASED COMMISSIONING

The Berkeley campus of the University of California requests that engineering firms submit written statements of qualifications for providing services for the following proposed project:

Strategic Energy Plan Monitoring-Based Commissioning

Project No. 12401

Estimated Cost: \$7,800,000

This project will perform monitoring-based commissioning of approximately 45 buildings on the Berkeley Campus over the next four years. Individual buildings range in size from approximately 50,000 to 420,000 gross square feet.

An information package containing further details about this project will be available at www.cp.berkeley.edu on or after Wednesday, February 18, 2009. The packet also provides specific submittal requirements.

Submittals must be delivered to the address below no later than 4:30 pm, Friday, March 6, 2009. Five (5) copies of the submittal are requested. Firms that meet the screening criteria will be invited for an interview. Please address submittals to:

Patrick MacArdle

Capital Projects

University of California, Berkeley

1936 University Avenue, 2nd Floor

Berkeley, CA 94720-1380

The University of California is an Equal Opportunity Employer. Every effort will be made to ensure that all persons, regardless of race, religion, sex, color, ethnicity and national origin have equal access to contracts and other business opportunities with the University.

PROJECT BACKGROUND & DESCRIPTION

The University is committed to reducing energy consumption. A system wide Strategic Energy Plan for campus buildings 50,000 square feet in area and larger was recently completed. The plan identified projects that could be implemented to reduce annual energy use in campus buildings. Projects were identified at the concept level only. For existing buildings, potential projects include monitoring-based commissioning and retrofit projects. The UC Berkeley plan is available to view online at:

www.facilities.berkeley.edu/GreenBuildings/Use_Savings/SEP/Report_final.pdf

Identified retrofit projects ideally will be integrated with the commissioning process for each building. It is also expected that additional retrofit projects will be identified during the commissioning effort.

Projects will be completed as part of the 2009-2011 UC/CSU/IOU Partnership. This is a statewide energy efficiency program for higher education that provides incentives for energy efficiency projects. The commissioning consultant will work closely with the Partnership administration at each phase of the project including scoping, preliminary engineering, application, scheduling, implementation, final report, and verification.

SCOPE OF SERVICES

The scope of services includes full services from project definition through to project completion and verification.

1. Develop project based on Strategic Energy Plan. Perform preliminary investigation of measure potential.
2. If necessary, revise savings estimate based on measure potential and/or meter data.
3. Working with the University, prepare Partnership Application and proposed project schedule and anticipated construction budget. Project schedules to use Primavera software and to include mandatory milestones as shown on attached MBCx template.
4. Assist the University with preparation of submittal materials for review purposes.
5. Implement project in accordance with Best Practices in Commissioning Existing Buildings as published by the Building Commissioning Association.
6. When directed, prepare design and bidding documents for identified retrofit measures, including complete plans and specifications.

7. Prepare cost estimates at all phases.

The University reserves the option to terminate services based on performance concerns or inability to reach agreement on compensation.

SCHEDULE

It is anticipated that design services will begin immediately upon selection.

ENGINEERING FEES

Fees for the project will be in the range of \$2,000,000 to \$2,500,000 and will be negotiated and invoiced on a building-by-building basis.

Reimbursable expenses will be in accordance with the Regents Agreement and will not include local (within Bay Area) transportation, phone or fax charges, CADD fees, or expenses for reproductions made for the designer's or consultant's in-house use.

JOINT VENTURES/ASSOCIATIONS

If the Commissioning Consultant proposes to be comprised of an association or joint venture, then the submittal should address the qualifications of the firms forming the association/joint venture. Proposals should consist of a single set of forms incorporating both firms.

SELECTION CRITERIA

The Screening Committee will be seeking project teams with experience in comparable projects. Major considerations in selection of the firm will be the following:

- Demonstrated firm and staff experience in the commissioning of existing university, institutional, or corporate facilities.
- Proven capabilities for providing creative energy efficiency solutions in existing buildings with an economy of means. Firms are asked to submit appropriate graphic material supporting design creativity that meets strict budget constraints.
- Proven ability to manage a multi-year, multi-building Monitoring Based Commissioning project on a single campus or a single client.
- Proven technical, cost and schedule management capabilities.

- Experience with institutional clients and building committees.
- Qualifications of the Principals and Project Team Members, including a clear definition of the primary responsibility of each.
- Proximity to the Berkeley campus, or ability to provide a comparable level of service if non-local.
- Ability to provide Professional Liability Insurance in the amount of \$3,000,000.

SELECTION PROCESS

Written Qualifications Statements should be in accordance with the attached Submittal Format.

Submittals must be delivered to the address below no later than 4:30 pm, Friday, March 6, 2009. Five (5) copies of the submittal are requested. Firms that meet the screening criteria will be invited for an interview. Please address submittals to:

Patrick MacArdle
Capital Projects
University of California, Berkeley
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Berkeley, CA 94720-1380

The firm will be required to complete the project within the approved budget and schedule in accordance with the agreement between the Regents of the University of California and the design professional. The successful firm will be required to sign the University's Professional Services Agreement, which is posted for review at <http://www.cp.berkeley.edu/CP/ContractAdmin/SampleDocs/Agreements/PSA.pdf>.

Questions not answered in this information package may be addressed to Patrick MacArdle at (510) 642-4451 and pmacardle@cp.berkeley.edu.

SUBMITTAL FORMAT

1. **COVER LETTER** (maximum of 1 page)
 - provide name of contact person, phone and fax
 - summarize qualifications most relevant to this project

2. **RELEVANT QUALIFICATIONS** (maximum of 2-4 pages)
 - provide in summary format only
 - do not include general information
 - offer short, focused paragraphs by topic per Selection Criteria

3. **RELEVANT EXPERIENCE** (maximum of 8 pages, color Xerox acceptable)
 - briefly state relevance and role firm played
 - specify role of the firm or individual if work was not exclusively by the firm (i.e., joint venture, association) or, if work was done by individuals on the project team while with other firms, their roles should be clearly stated
 - provide a list of the following:
 - project name
 - beginning/ending dates of the project
 - square footage
 - cost
 - measures implemented
 - owner contact person & phone no.
 - identify which proposed team members worked on this project, if any

4. **PROJECT TEAM SUMMARY** (maximum of 2 pages)
 - identify individual team member
 - summarize roles/responsibilities on this project and experience relative to those roles
 - describe previous collaborative experience on relevant projects; state relevance

5. **COST AND QUALITY CONTROLS** (maximum of 1 page)
 - concisely describe cost and quality control techniques employed by the firm, as they relate to cost containment and scheduling
 - include benefits attributable to these techniques used on specific projects; ideally, references (see below) should confirm effectiveness of these systems

6. **REFERENCES** (minimum of 3-6)
 - provide client references that are relevant to the above projects

7. **APPENDIX (items to be included)**
 - firm brochure/history/background, reprints, etc. (maximum 10 pages)
 - key team member resumes

Index all submittals with tabs labeled as per numbered categories above. Double-sided printing is encouraged.