Western Carolina University

Division of Administration and Finance

Request for Qualifications
For Commissioning Agent for the Energy Production Facility

1.1 SUMMARY OF REQUEST

Western Carolina University (WCU) is soliciting Request For Qualifications for professional Commissioning Agent (CxA) design, construction administration and post construction services the new Energy Production Facility located on the Main Campus in Cullowhee, North Carolina. The project will consist of the construction of approximately 20,000 square foot multi-storied steam plant to replace the existing steam plant. The project will be phased to allow for the existing steam production bay to stay operational until the new plant is online. After existing operations are relocated, the existing equipment will be demolished for the construction of Phase II (site amenities and landscaping). It is expected that construction will be completed by June 2021.

It will be the responsibility of the successful CxA firm to provide review during the design phases, including but not limited to constructability review conformance with WCU's project requirements; the design team's energy model; Life Cycle Cost Analysis; and of proposed building operation systems and specifications. The CxA will also be responsible for the development of the commissioning scope of work including but not limited to Commissioning specifications, procedures, and checklist for the project.

The purpose of this document is to provide the detail of the CxA services required for this project and establish the basis for the contract agreement between WCU and the CxA service provider. Although unforeseen circumstances may require departures from this directive; any deviations require prior written approval or direction from WCU or the WCU Project Manager.

1.1.1 WCU Background

WCU was founded in August 1889 as a semi-public secondary school and chartered as Cullowhee High School in 1891. The founder, Professor Robert Lee Madison, wanted to provide an education for the young people in the region and train teachers to spread education throughout the western part of the state. In 1893, the Legislature designated the school as the first publicly funded normal school.

Over the next 40 years, the school expanded its curriculum and evolved into a junior college, and in 1929 it was chartered by the legislature as a four-year institution under the name Western Carolina Teachers College. Often called "the Cullowhee experiment," Madison's idea became the model for the other regional colleges in the state.

In 1967, the institution was designated a regional university by the North Carolina General Assembly and Western Carolina University was given its current title. And, on July 1, 1972, WCU became a member of the University of North Carolina system.

The Millennial Initiative, doubling the size of the campus in 2005, is a growing knowledge enterprise zone where university faculty and students, private industry, and government partners conduct research and development into scientific and technological innovations that have commercial applications. WCU continues its promise to the region by giving students intensive, hands-on educational opportunities while simultaneously promoting economic development.

2.1 PROJECT

2.1.1 Project Confidentiality

The CXA service provider will be required to: 1) Maintain strict confidentiality of all oral, written and otherwise documented information pertaining to this project; 2) Limit distribution of such information to only individuals necessary to prepare your proposal; 3) Return all materials provided by WCU during the Request for Qualifications (RFQ) process to the WCU Project Manager, within ten (10) calendar days of notification, if you are not awarded the contract; and 4) Include an acknowledgement that all copies made have been destroyed. If you are awarded the contract, do not distribute any project related information at any time, except as required to complete the project, without written permission or direction from WCU.

2.1.2 CxA Scope of Services

The selected CxA firm will review and comply with the Western Carolina University's Design Standards section "Appendix A – Commissioning Guide" as part of the contractual requirements. The Design Standards will be shared with the selected CxA firm prior to the development of their fee. The scope of work shall include but not limited to the following items:

A. Design Development Phase

a. Participate in design meetings with Owner and their consultants
b. Review constructability of building systems and constraints
c. Review Architectural and Engineering space/system documents
d. Review Energy Model and LCCA for compliance to WCU's project requirements
e. Develop Commissioning specifications and checklist
f. Review conceptual cost estimate and reconciliation with Design Team's estimate
g. Update final preliminary constructability report for WCU's review.

B. Construction Document Phase

a. Participate in design meetings with Owner and their consultants
b. Review constructability of building systems and constraints
c. Review Architectural and Engineering space/system plans
d. Present final constructability report for WCU's review.
e. Prepare final Cx documents in coordination with the Design Team

C. Construction Administration

a. Attendance of monthly SCO meeting
b. Review of installation of building systems
c. Review submittals related to building systems
d. Conduct pre-commissioning meeting with design/construction teams
e. Commission building systems prior to Substantial Completion

2.1.3 Changes in CxA Scope or Criteria

During the design and/or construction phase, it may be necessary for WCU to make modifications or additions to the project scope or criteria. In such cases, the WCU Project Manager will request a Proposal Request (PR) from the appropriate party. In either case, do not proceed with the changes until receipt of a change order or contract alteration signed by an authorized WCU representative and SCO. If verbal instructions are received from one of the members of the WCU project team that would result in changes to the original scope or criteria and have an impact on the total costs or schedule of your contract, notify the WCU Project Manager. Unless otherwise directed by WCU, submit detailed break out quotations for Proposal Request.

Change Notice with details of CxA hour's, certified payroll rates, labor burden (not to exceed 40%), reimbursable, etc. to be provided. There may be times when the WCU Project Manager will request that you prepare one or more of the following, to be included in an ASP:

- Description of the change
- Estimated hours, by trade, to accomplish the change
- Proposed duration for the completion of design revisions and notification of whether or not the modifications will result in additional duration to the established contractual delivery dates, if applicable
- Net change in fee to complete the change, broken down by drawing and specification revisions, document distribution, construction cost estimate preparation, and additional shop drawing reviews resulting from the change

2.1.4 1.1.4.1 Changes Initiated by the CxA

WCU encourages you to submit recommendations for procedures or design changes that will reduce project cost, improve functionality of the completed facility, and/or shorten the project schedule. However, any such changes are subject to approval by WCU and must meet the same functional and technical requirements that are included in this RFP. Identify and submit recommended changes separately from other project correspondence and documentation. Provide all information and materials necessary to satisfy the WCU project team that recommended changes do not adversely affect cost, functionality, or schedule.

3.1 Kick-Off Meeting

The WCU Project Manager will schedule a kick-off meeting with the A/E and CxA. It is mandatory that your project organization chart be established by the day of this meeting and that your Project Manager and all assigned pre-planning staff be in attendance. The CxA shall require that all the people that will be attending the kick-off meeting read the entire document and formulate questions regarding the parts of it that they will be responsible for and do not fully understand.

At this kick-off meeting the following items will be completed/reviewed:

- Review of project scope.
- Review of, and the identification of, specific people from each organization for the items, services, tasks, etc. indicated including roles and responsibilities.
- A preliminary schedule, by A/E - CxA, indicating functional review meeting dates, coordination meeting dates, completion of engineering dates, issue of bid dates, award of contract dates, and construction duration periods for each bid package.

3.2 SCHEDULE

3.2.1 Project Summary Schedule

Anticipated milestone dates that are critical to the delivery of this project are as follows:

Posting of RFQ	October 17, 2018	5:00 PM
Question Period	October 17 – November 7	
Issue of Addendum	November 8, 2016	5:00 PM
Proposals due	**November 15, 2018**	**2:00 PM**
Recommend Selection List to SCO	November 20, 2018	
Negotiate/Award Contract	**December 2018**	**30 days**
Kick-off Meeting	January 10, 2019	1:30 PM
Design Development Phase	January – April 2019	Estimated
SCO Review and Comment Period	May 2019	30 days
Construction Document Phase	June – October 2019	Estimated
50% Construction Document Plot	August 2019	Estimated
95% Construction Document Plot	October 2019	
SCO Review and Comment Period	October - November 2019	60 days
100% Construction Document Plot	November 2019	
SCO re-submittal	November 2019	
SCO Final Approval	December 2019	15 days
Negotiate/Award CXA for Construction Contract	**February 2020**	**30 days**
Start of Construction	January 2020	Estimated
Completion of Construction	**June 2021**	

4.1 QUALIFICATIONS

4.1.1 Organization

Please submit general statements about your organizations qualifications and other information deemed necessary. Include at least the following:

- Firm name, business address, telephone, email address, website address and fax numbers
- Contact person(s) with title(s)
- Professional history and affiliations
- Current staff size and professional registrations
- Range of Construction Management service capabilities
- Impact of current workload on ability to meet the requirements of this RFQ
- Previous experience with WCU

4.1.2 Relevant Project Experience

Provide descriptions of at least three projects that have been executed within the past five years. The projects described shall be similar in scope and complexity to the project described within this RFQ. Please include at least the following:

- Project size (square feet)
- Construction value
- Basic project program
- Project delivery approach
- Project owner with current address and telephone number
- Principal Tenant Organization contact with current address and telephone number

4.1.3 Key Personnel

Please submit resumes for key personnel proposed for the project form. State their proposed project responsibilities. Include the following:

- Project Manager
- Signatory Licensee who will be professionals of record
- Discipline leaders (site, building, plumbing, mechanical, electrical, etc.)
- Project Managers and licensed engineers of consulting firms
- Field representative(s)
- Other specialists

4.2.1 Proposal Submittal Information

Please submit one (1) electronic copy (PDF format on flash drive or email) of your qualifications with all requirements of this RFQ to the following postal address:

Matthew J. Ketchum, AIA
Director of Capital Projects
Office of Facilities Management
Western Carolina University
3476 Old Cullowhee Road
Cullowhee, NC 28723
mjketchum@wcu.edu

- Each proposal is limited to 20 pages (40 printed pages if printed double sided) exclusive of Cover, Cover Letter, Dividers, and Back Cover