

**WELLESLEY FACILITIES MAINTENANCE DEPARTMENT
REQUEST FOR PROPOSALS #WFMD-RFP-FY15-001
MECHANICAL ENGINEERING SERVICES**

AUTHORITY

Town of Wellesley
Facilities Maintenance Department
40 Kingsbury Street
Wellesley, MA 02481

PROJECT

Provide *Mechanical Engineering Services* for the purpose of evaluating energy conservation measures (ECMs) at four Town buildings.

Requests for Proposals (RFP)

Available April 16, 2014 at:
Facilities Maintenance Department
40 Kingsbury Street
Wellesley, MA 02481, or online at:

http://www.wellesleyma.gov/pages/wellesley_ma_facilities/index

Estimated Construction Costs

N/A

Briefing Session and Tours

April 30, 2014 at Town Hall at 1:00 pm

Time Period for Completed Work

See Project Schedule

Specific Designer Services

Mechanical Engineering study and design

Scope of Work

Perform mechanical engineering services at four buildings to recommend HVAC modifications at two buildings and energy conservation measures at all four.

Submissions

Deadline:
May 8, 2014 before 11:00 am

Location:
Town of Wellesley FMD Offices
40 Kingsbury Street
Wellesley, MA 02481

Clearly marked:
“Proposal for FMD Mechanical Engineering Services”

Contact Information

Allen Hebert, Project Manager
Telephone: (781) 446-6210 X5633
Email: ahebert@wellesleyma.gov
Facsimile: (781) 446-6207

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SECTION I - INTRODUCTION

The Town of Wellesley is seeking Requests for Proposals (RFP's) from qualified registered engineers and/or other qualified firms to provide professional services to study existing heating, ventilating and air-conditioning (HVAC) systems and to recommend energy conservation measures (ECMs) at four buildings: Town Hall, Warren Recreation Building, Sprague Elementary School and Bates Elementary School.

<i>Building</i>	<i>Contact: Custodian and Phone</i>	<i>Year of Last Major Upgrade</i>	<i>Size (sf)</i>
Town Hall, 525 Washington Street	Bill Newton/781-431-1019 x2284	1985	32,240
Warren Recreation Building, 90 Washington Street	Ron Colleton/781-235-2370 x4114	2004	26,100
Sprague School, 109 School Street	Scott Grady/781-263-1969 X2532	2001	72,700
Bates School, 116 Elmwood Road	Al Martignetti/781-446-6315 X2133	2004	52,750

The project goal is to evaluate and analyze key elements of the existing HVAC systems and appurtenances for the purpose of identifying potential energy conservation measures (ECMs) and other improvements. Construction work for schools would need to be performed during summer recesses to avoid interruption to school functions. The Town FMD is soliciting submittals from qualified mechanical engineers.

The Sprague and Bates schools were substantially renovated in 2001 and 2004 respectively and accordingly the focus will be on identifying ECMs. Although new chillers and a direct digital control (DDC) system was installed at Town Hall in 2011, the last substantial HVAC work was performed in 1985 and much of the system is near the end of its service life and there are known deficiencies in many areas of the building. The Warren Building was substantially renovated in 2004; however the building lacks controls, many of the more than 20 heats pumps have failed or are in danger of failing and the boiler plant has several known deficiencies.

SECTION II – SCOPE OF SERVICES

The Town of Wellesley is seeking Requests for Proposals (RFP's) from qualified registered engineers and/or other qualified firms to provide professional services, which may include but not be limited to:

The engineering consultant shall be responsible for assessing all heating, ventilating and air-conditioning (HVAC) systems at each building in the project to a level that is sufficient for the purpose of identifying potential energy conservation measures (ECMs). It is anticipated that this will include: boilers, pumps, heat pumps, variable-frequency drives (VFDs), chillers, roof top air-handling units, classroom unit ventilators, rooftop exhaust fans, and ventilation units, control devices, thermostats, computer control system and all associated electrical/plumbing/fire protection appurtenances. Electricity and natural gas utility data will be furnished for each building. An initial list of potential ECMs will be developed and

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discussed with the Town. ECMs deemed by the Town to be most advantageous will be identified, and the consultant shall prepare more detailed information on such items including, but not limited to: scope of work, capital costs (including soft costs), life-cycle cost analysis (LCCA), pros/cons, grant opportunities and prioritization with respect to other ECMs.

Task 1 – EXISTING SYSTEMS AUDIT AND INVESTIGATION

Evaluate and audit key equipment related to Heating, Ventilating, and Air-Conditioning (HVAC) in the school:

1. Collect name plate information
2. Record the state of functionality
3. Indicate original life expectancy and years left until replacement is needed
4. Calculate efficiency of equipment
5. Make recommendations as necessary to provide maximum performance required by the building demands and manufacturer's specifications.

Task 2 – REVIEW EXISTING DOCUMENTATION AND INTERVIEW STAFF

1. Meet with Wellesley Facilities Maintenance Department personnel and their HVAC contractors for back ground information, repair history and expected functionality of the system.
 - a. Review "School Dude" maintenance work orders for last 24 months.
2. Review available original design drawings.
3. Review existing building design criteria as it relates to the HVAC systems
 - a. Review existing Metasys computerized control system.
4. Review previous electrical and natural gas utility data – furnished by Town.

Task 3 – IDENTIFY IMPROVEMENTS AND ECM'S

1. Document the results of the existing conditions assessment as part of the study, including system inadequacies, inefficiencies, equipment life expectancy and utility costs.
2. Based on the results of the existing conditions assessment, identify and evaluate repairs or other improvement options.
 - a. Address specific deficiencies at Warren and Town Hall
 - b. Prioritize proposed repairs/improvements
 - c. Identify criteria used for each option including, but not limited to: capital cost, life-cycle, construction schedule and impact to school environment, construction schedule sustainable
3. Develop an initial prioritized list of all potential ECMs for all four buildings and discuss them with the Town.
4. After reviewing with the Town, develop a short-list of the most advantageous ECMs with more detailed information including, but not limited to: scope of work, capital costs (including soft costs), life-cycle cost analysis (LCCA), pros/cons, grant opportunities and prioritization with respect to other ECMs.
5. Investigate and discuss possible utility rebate incentives as it relates to recommendations.

Task 4 – PREPARE REPORT

1. Prepare and submit eight (8) bound copies of the report, including a PDF version. All photographs in the study shall be color.
2. Report shall include an executive summary, summarize the results of the assessment and include at minimum:
 - a. Statement of project goals and objectives

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- b. Description of existing systems, conditions/deficiencies and operations
- c. Evaluation of repair/replacement/improvement options at Town Hall and Warren
- d. Preliminary list of ECMs for all buildings
- e. Final list of ECMs with: capital costs, life-cycle cost analysis, pros/cons
- f. Discussion of construction related issues including phasing

Task 5 – MEETINGS AND PRESENTATIONS

Prepare for and attend meetings with the Town to discuss the progress of the project.

1. Consultant shall meet with the Town approximately every two to three weeks, and as necessary. There shall also be a Project Kick-Off meeting.
2. Consultant shall attend and present the results of the work at a meeting to the Board of Selectmen at a date to be determined.

FUTURE PHASES – FINAL DESIGN, BIDDING ASSISTANCE AND CONSTRUCTION SERVICES

The Town may, at their discretion, continue with the engineer as the Design Engineer in the preparation of Contract Documents for selected recommendations in accordance with MGL Chapter 149 Public Bidding Laws and subsequently provide Bidding Assistance and Construction Administrative Services to each construction project.

SECTION III – RFP INSTRUCTIONS

There will be a pre-submission briefing and tour for this project on April 30, 2014 at 1:00 pm, starting at the Town Hall located at 525 Washington Street, Wellesley, Massachusetts.

To be considered for selection interested consultants must ensure seven (7) bound packets and seven (7) CDs containing all the information specified in Section IV of this *Request for Proposals* are to be received by the Wellesley Facilities Maintenance Department, 40 Kingsbury Street, Wellesley, MA 02481 by 11:00 am, May 8, 2014. All packets must clearly identify the contents as “***Proposal for Mechanical Engineering Services***”.

All questions pertaining to the general nature of this project, or to the specific requirements of this RFP, must be received in writing and may be addressed to the Project Manager listed in the *Contact Information* on the front page of this RFP.

As required by the Designer Selection Guidelines put forth by the Commonwealth of Massachusetts Designer Selection Board, the following information is provided to potential consultants for the above work.

SECTION IV – SUBMISSION REQUIREMENTS

The following information shall be submitted by each firm in order to be considered for this project:

1. Completion of Standard Designer Application Form (updated February 2013);
2. Firm Background: A two-page narrative (maximum) of general, brief description of firm including history, size and staff make-up.
3. Resumes: Key staff and sub-consultants who will work on project, highlighting the proposed project manager and his/her experience on similar projects.

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4. References: The name, title, address and telephone numbers of client contacts of projects outlined in related experience.
5. Approach: Proposal outlining how the firm would approach/provide the specified Scope of Services;
6. Preliminary schedule;
7. A certified statement to support the firm's financial stability; and
8. Copies of current insurance certificates. Demonstrated ability to provide professional liability insurance in the amount of \$100,000 for the study phase.

SECTION V - SELECTION PROCEDURE

The Facilities Maintenance Department and/or its designees will review all proposals and select at least three finalist engineering firms based on the information provided in the qualifications and the following criteria, as a minimum:

1. Prior similar experience;
2. Past performance on public sector projects;
3. Quality of work;
4. Financial stability;
5. Sufficient capacity to complete the project in a timely manner;
6. Qualifications and registrations of personnel and subconsultants who will work on the project; and
7. Any other criteria that the Town considers to be relevant to the project.

Once the submitted qualifications have been reviewed, the evaluation Committee will select a minimum of three finalist firms for interviews. The Committee will then interview the finalists, at which time firms may be asked to detail their qualifications further; providing additional information and their ideas and approach to the project. The Committee will rank the interviewed finalists and make a recommendation to the Director of Facilities Maintenance Department.

A contract and fee will be negotiated with the selected firm. The maximum amount of the fee shall not exceed \$35,000. The final negotiated contract(s) shall contain all minimum requirements/certifications as outlined in the State's most recent version of the Designer Selection Guidelines – Cities and Towns.

The Town reserves the right to select the firm it feels is most qualified based on the information submitted, to waive any informality and to choose an engineering consultant determined to be able to perform in the best interests of the Town. The Town may, at their discretion, continue with the engineer as the Design Engineer in the preparation of Contract Documents for selected recommendations in accordance with MGL Chapter 149 Public Bidding Laws and subsequently provide Bidding Assistance and Construction Administrative Services to each construction project.

SECTION VI - PROJECT SCHEDULE

The following time schedule is planned, but subject to change:

April 16, 2014	Notice Published in Central Register and RFP Available
April 30, 2014	Project Briefing and Tours starting at Town Hall at 1:00 pm
May 2, 2014	Last day for proposer questions by 4:00 pm

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May 8, 2014	RFP Submissions Due before 11:00 am
May 15, 2014	Finalists (Top 3) Selected by Committee
May 29, 2014	Finalists Interviewed at Town Hall – 9:00 am to Noon
June 6, 2014	Award letter issued
June 20, 2014	Contract Executed
July 1, 2014	Notice to Proceed
October 1, 2014	Work Complete

SECTION VII - GUIDELINES FOR PROPOSAL REVIEW COMMITTEE

The Town of Wellesley will determine an appropriate Selection Committee comprised of representatives from various departments, including the Facilities Maintenance Department. Each Committee member is responsible for independently ranking each proposal in accordance with point system below:

- | | |
|--|---------------------------|
| 1. Experience, past performance and qualifications | 40 points maximum |
| 2. Personnel to be utilized on project | 20 points maximum |
| 3. Project Approach | 40 points maximum |
| 4. Supplementary Material | No point for this section |
| 5. Adjustment for Experience with Candidate Firm | |
| a. For a firm with which a contacted reference has had a particularly favorable experience | Add up to 10 points |
| b. For a firm with which a contacted reference has had a particularly negative experience | Deduct up to 20 points |
| c. For a firm with which a contacted reference has had no experience or average to good experience | Make no adjustment |

TOTAL POINT **100 points maximum**

NOTES

1. Supplementary material is to be considered incidental to categories 1 through 3. The ratings for those categories should reflect any of the supplementary material that is referenced in the direct responses to the items in the Proposal.

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SECTION VIII – POST INTERVIEW RATING GUIDELINES

1. Demonstrated knowledge of project scope	25 points maximum
2. Project Approach	25 points maximum
3. Reference Checks	25 points maximum
4. Project Manager	25 points maximum
5. Adjustment for experience with the candidate firm	
a. For a firm with which a contacted reference has had an especially favorable experience	Add up to 5 points
b. For a firm with which a contacted reference has had a particularly negative experience	Deduct up to 20 points
c. For a firm with which a contacted reference has had no experience or average to good experience	Make no adjustment
TOTAL POINT	100 points maximum

SECTION XI – CONTRACTUAL PROVISIONS

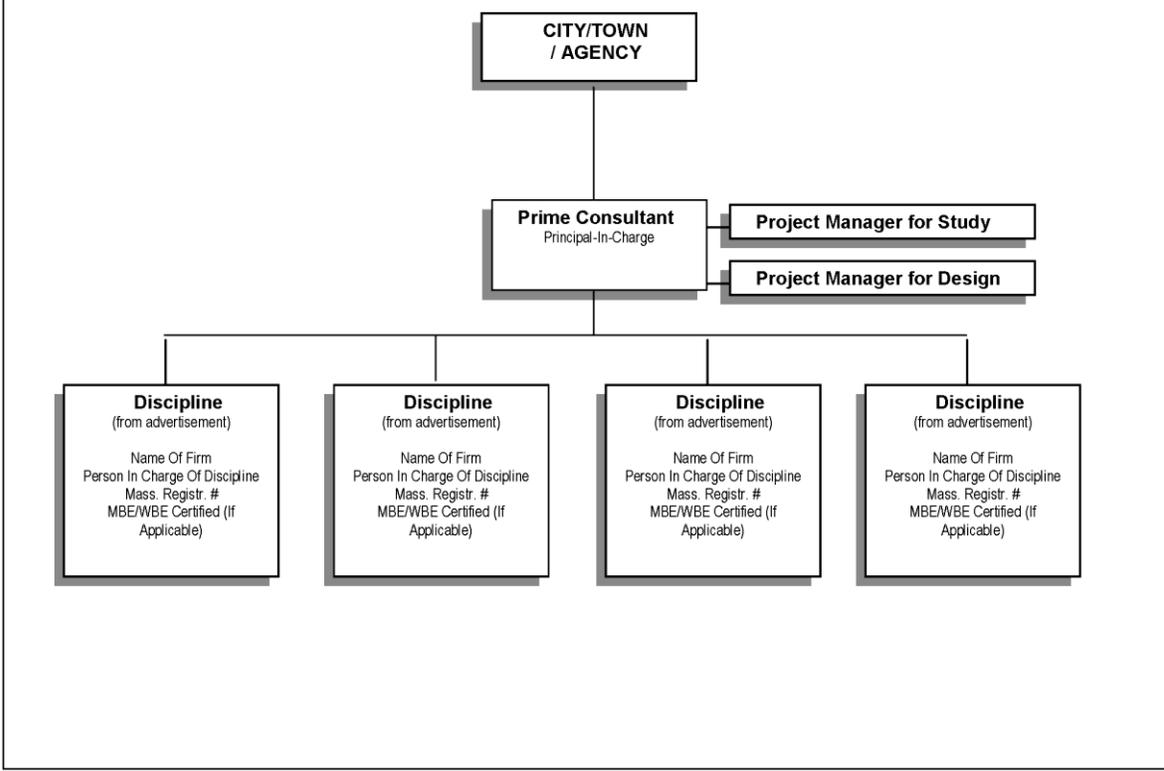
In accordance with M.G.L. c.7C, §§44-58 the following requirements must be included in the design contract relating to non-collusion in the submission of applications, and to financial reports that the designer must file:

- Certification that the designer or construction manager has not given, offered, or agreed to give any person, corporation or other entity any gift, contribution, or offer of employment as an inducement for, or in connection with, the award of the contract for design services;
- Certification that no consultant to or subcontractor for the designer or construction manager has given, offered, or agreed to give any gift, contribution, or offer of employment to the designer or construction manager, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a contract by the designer or construction manager;
- Certification that no person, corporation or other entity, other than a bona fide full-time employee of the designer or construction manager, has been retained or hired by the designer or construction manager to solicit for or in any way assist the designer or construction manager in obtaining the contract for design services upon an agreement or understanding that such person, corporation, or other entity be paid a fee or other consideration contingent upon the award of the contract to the designer; and
- Certification with respect to contracts which exceed \$10,000 or which are for the design of a building for which the budgeted or estimated construction costs exceed \$100,000 that the designer has internal accounting controls as required by M.G.L. c.30, §39R(c) and that the designer has filed and will continue to file an audited financial statement as required by M.G.L. c.30, §39R(d).

Note also that any person contracting with a governmental body must certify in writing that he or she has complied with state tax laws, reporting of employees and contractors, and withholding and remitting of child support. [M.G.L. c.62C, §49A]

Commonwealth of Massachusetts Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction (Updated February 2013)	1. Project Name/Location For Which Firm Is Filing:	2. Project #	
	This space for use by Awarding Authority only.		
3a. Firm (Or Joint-Venture) - Name and Address Of Primary Office To Perform The Work:	3e. Name Of Proposed Project Manager: For Study: (if applicable) For Design: (if applicable)		
3b. Date Present and Predecessor Firms Were Established:	3f. Name and Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above:		
3c. Federal ID #:	3g. Name and Address Of Parent Company, If Any:		
3d. Name and Title Of Principal-In-Charge Of The Project (MA Registration Required): Email Address: Telephone No: Fax No.:	3h. Check Below If Your Firm Is Either: (1) SDO Certified Minority Business Enterprise (MBE) <input type="checkbox"/> (2) SDO Certified Woman Business Enterprise (WBE) <input type="checkbox"/> (3) SDO Certified Minority Woman Business Enterprise (M/WBE) <input type="checkbox"/>		
4. Personnel From Prime Firm Included In Question #3a Above By Discipline (List Each Person Only Once, By Primary Function -- Average Number Employed Throughout The Preceding 6 Month Period. Indicate Both The Total Number In Each Discipline And, Within Brackets, The Total Number Holding Massachusetts Registrations):			
Admin. Personnel _____ ()	Ecologists _____ ()	Licensed Site Profs. _____ ()	Other _____ ()
Architects _____ ()	Electrical Engrs. _____ ()	Mechanical Engrs. _____ ()	
Acoustical Engrs. _____ ()	Environmental Engrs. _____ ()	Planners: Urban./Reg. _____ ()	
Civil Engrs. _____ ()	Fire Protection Engrs. _____ ()	Specification Writers _____ ()	
Code Specialists _____ ()	Geotech. Engrs. _____ ()	Structural Engrs. _____ ()	
Construction Inspectors _____ ()	Industrial Hygienists _____ ()	Surveyors _____ ()	
Cost Estimators _____ ()	Interior Designers _____ ()		
Drafters _____ ()	Landscape Architects _____ ()		Total _____ ()
5. Has this Joint-Venture previously worked together? <input type="checkbox"/> Yes <input type="checkbox"/> No			

6. List **ONLY** Those Prime And Sub-Consultant Personnel Specifically Requested In The Advertisement. This Information Should Be Presented Below In The Form Of An Organizational Chart. Include Name Of Firm And Name Of The One Person In Charge Of The Discipline, With Mass. Registration Number, As Well As MBE/WBE Status, If Applicable:



<p>7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. Confine responses to the space provided on the Form and limit Resumes to ONE person per discipline requested in the Advertisement. <u>Include Resumes of Project Managers.</u> Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.</p>	
a. Name and Title Within Firm:	a. Name and Title Within Firm:
b. Project Assignment:	b. Project Assignment:
c. Name and Address Of Office In Which Individual Identified In 7a Resides: <div style="text-align: right;"> MBE <input type="checkbox"/> WBE <input type="checkbox"/> </div>	c. Name and Address Of Office In Which Individual Identified In 7a Resides: <div style="text-align: right;"> MBE <input type="checkbox"/> WBE <input type="checkbox"/> </div>
d. Years Experience: With This Firm: _____ With Other Firms: _____	d. Years Experience: With This Firm: _____ With Other Firms: _____
e. Education: Degree(s) /Year/Specialization	e. Education: Degree(s) /Year/Specialization
f. Active Registration: Year First Registered/Discipline/Mass Registration Number	f. Active Registration: Year First Registered/Discipline/Mass Registration Number
g. Current Work Assignments and Availability For This Project:	g. Current Work Assignments and Availability For This Project:
h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):

8a. Current and Relevant Work By Prime Applicant Or Joint-Venture Members. Include ONLY Work Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (List Up To But Not More Than 5 Projects).					
a. Project Name And Location Principal-In-Charge	b. Brief Description Of Project And Services (Include Reference To Relevant Experience)	c. Client's Name, Address And Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee for Work for Which Firm Was Responsible
(1)					
(2)					
(3)					
(4)					
(5)					

8b. List Current and Relevant Work By Sub-Consultants Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (Up To But Not More Than 5 Projects For Each Sub-Consultant). Use Additional Sheets Only As Required For The Number Of Sub-Consultants Requested In The Advertisement.

Sub-Consultant Name:

a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience)	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/s Responsible
(1)					
(2)					
(3)					
(4)					
(5)					

9. List All Projects Within The Past 5 Years For Which Prime Applicant Has Performed, Or Has Entered Into A Contract To Perform, Any Design Services For All Public Agencies Within The Commonwealth.					
# of Total Projects:		# of Active Projects:	Total Construction Cost (In Thousands) of Active Projects (excluding studies):		
Role P, C, JV *	Phases St., Sch., D.D., C.D., A.C.*	Project Name, Location and Principal-In-Charge	Awarding Authority (Include Contact Name and Phone Number)	Construction Costs (In Thousands) (Actual, Or Estimated If Not)	Completion Date (Actual or Estimated) (R)Renovation or (N)New
		1.			
		2.			
		3.			
		4.			
		5.			
		6.			
		7.			
		8.			
		9.			
		10.			
		11.			
		12.			

* P = Principal; C = Consultant; JV = Joint Venture; St. = Study; Sch. = Schematic; D.D. = Design Development; C.D. = Construction Documents; A.C. = Administration of Contract

10.	Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Sub-Consultants For The Proposed Project. If Needed, Up To Three, Double-Sided 8 1/2" X 11" Supplementary Sheets Will Be Accepted. APPLICANTS ARE ENCOURAGED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED IN THE ADVERTISEMENT.							
Be Specific – No Boiler Plate								
11.	Professional Liability Insurance:							
	Name of Company	Aggregate Amount	Policy Number	Expiration Date				
12.	Have monies been paid by you, or on your behalf, as a result of Professional Liability Claims (in any jurisdiction) occurring within the last 5 years and in excess of \$50,000 per incident? Answer YES or NO. If YES, please include the name(s) of the Project(s) and Client(s), and an explanation (attach separate sheet if necessary).							
13.	Name Of Sole Proprietor Or Names Of All Firm Partners and Officers:							
	Name	Title	MA Reg #	Status/Discipline	Name	Title	MA Reg #	Status/Discipline
	a.				d.			
	b.				e.			
	c.				f.			
14.	If Corporation, Provide Names Of All Members Of The Board Of Directors:							
	Name	Title	MA Reg #	Status/Discipline	Name	Title	MA Reg #	Status/Discipline
	a.				d.			
	b.				e.			
	c.				f.			
15.	Names Of All Owners (Stocks Or Other Ownership):							
	Name And Title	% Ownership	MA. Reg.#	Status/Discipline	Name And Title	% Ownership	MA. Reg.#	Status/Discipline
	a.				d.			
	b.				e.			
	c.				f.			
16.	I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. I further certify that this firm is a "Designer", as that term is defined in Chapter 7, Section 38A1/2 of the General Laws, or that the services required are limited to construction management or the preparation of master plans, studies, surveys, soil tests, cost estimates or programs. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury.							
	Submitted by (Signature)	_____			Printed Name and Title	_____		Date _____