



REQUEST FOR PROPOSAL: HVAC CONTRACTING FOR BELHAVEN UNIVERSITY

A proposal for the following services is sought:

HVAC Contracting

Owner:

**Belhaven University
Jackson, MS**

Date of Request:

November 8, 2024

PROPOSAL DUE DATE:
December 10, 2024

PROPOSAL DUE TIME:
3:00 PM CST

SUBMIT PROPOSALS TO:
<https://bit.ly/BURFPSubmissions>

Contact Person:

Ricky White
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Lance Zaerr, Jr.
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Questions:

Submit ALL Proposal Questions via
<https://bit.ly/BU-RFPQuestions>

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Section 1: Project Information

Belhaven University is soliciting proposals from qualified engineering firms who have extensive experience in designing HVAC renovation projects on time and on budget. The submitted proposals will be quickly evaluated.

All proposals should follow the format described in Section 5 with thorough answers tailored specifically to this Request for Proposal. Responses should refer directly to section numbers in this request and meet or exceed the requirements as described.

Belhaven University reserves the right to accept or reject any or all proposals, or portions thereof.

1.1 About Belhaven University

Founded in 1883 Belhaven University serves over 3,400 students and offers undergraduate degrees in 80 areas of study, 20 master's level degrees, and doctoral programs in business and education. Belhaven University is accredited by the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) to award associate, baccalaureate, master's, educational specialist, and doctorate degrees. The University has achieved the distinction of being among only 36 universities nationally accredited in each of the major arts—music, theatre, visual art, and dance. With 17 NCAA Division III sports, nearly 400 Belhaven student-athletes wear a Blazers uniform and participate in over 300 athletic contests every year. Belhaven offers a high-quality education in a supportive environment with a 13:1 student to faculty ratio, where faculty and staff members are dedicated to academic rigor and grace-filled care. We are a residential-living campus, which means that a significant portion of our undergraduate population live in campus housing. At the beginning of the pandemic, we had 528 students living in dorms operated by the University. Although we do offer online classes, the majority of the classes (undergraduate, in particular) meet in-person in our academic building classrooms.

1.2 Project Delivery Method

Belhaven University seeks a professional engineering firm who specializes in HVAC and Mechanical scopes to provide design services that would upgrade the systems and equipment in several of their academic and dormitory buildings.

1.3 Project Background

Belhaven University has several older HVAC systems in their dormitories and academic buildings. The University seeks to improve the ventilation of their buildings through an HVAC replacement program that provides newer, more modern equipment, and more energy efficient equipment.

1.4 Project Schedule

Your firm should be capable of mobilizing quickly. A basic outline of the schedule is included below:

Date	Task
November 8, 2024	Release RFP
December 4, 2024	Site Walkthrough Note: Date may change due to respondent availability
December 4, 2024	Questions due by 10pm via https://bit.ly/BU-RFPQuestions
December 10, 2024	Receive Responses by 3:00pm via https://bit.ly/BURFPSubmissions
December 13, 2024	Firm Selection (Tentative Date)
December 16, 2024	NTP Issued (Tentative Date)

All dates above are subject to change at the discretion of the Owner.

1.5 Proposal Submittal Instructions

All proposals should follow the format outlined in Section 5.

To submit your proposal, please submit your digital response to the following:

<https://bit.ly/BURFPSubmissions>

An email confirming receipt of your proposal will be sent.

Late proposals will not be considered.

Section 2: Scope of Services

2.1 Contract Performance Deliverables

The selected firm shall perform the following services for the projects listed in section 2.2:

2.1.1 Schedule Development

1. The Contractor will establish a detailed Master Project Schedule encompassing all aspects of the project including Owner activities, Design milestones, other consultants/contracts, and Contractor's responsibilities for Construction, Testing and Balancing, Project Closeout, and Warranty.
2. The Contractor is responsible to monitor this schedule during all phases, update the schedule as required, and advise the Owner of any changes to the schedule as the project progresses.
3. The Contractor will utilize standard industry scheduling to prepare, provide, and maintain appropriately detailed schedules.

4. The Master Project Schedule shall be sufficiently detailed to allow for a realistic projection of construction and procurement activity sequences and durations. A draft Project Schedule shall be reviewed with the Owner for coordination prior to formally submitting.
5. The Schedule will be updated regularly by the Contractor.
6. The Contractor will be responsible for providing, on a regular basis, 3-week lookaheads that coincide with the Master Project Schedule.

2.1.2 Logistics Plan

1. Within 15 days of the Notice to Proceed, Contractor will develop a graphic Site Logistics Plan to help analyze the project site, define the flow of labor and material into the site, and reduce offsite traffic impacts. The Site Logistics Plan will show locations of all temporary construction facilities, including hoists, offices, and scaffolding, refuse removal chutes, crane positioning, safety equipment, staging areas, etc. The plan will also reference surrounding roads, parking, offices, public buildings, and activities that may be affected. The Site Logistics Plan will attempt to maintain a smooth flow of material and labor around the job site(s) and maintain an efficient project schedule.
2. Develop additional Logistics strategies with associated plans to support phased construction, if needed, to maintain access to existing facilities and active areas that need to remain accessible and operational during construction.

2.1.3 Quality Control / Quality Assurance Program

1. The Contractor shall furnish to the Owner for review and approval a written Quality Control / Quality Assurance Plan.
2. This plan shall be based on structured and industry acceptable QA/QC steps to be performed by the Contractor during all phases of construction.
3. Review all design and construction documents, including but not limited to drawings, specifications, cost estimates, constructability reports, engineering reports, site assessments, and other related project documentation created by the Project Engineer or the provisioned by the Owner.

2.1.3 Constructability Reviews

1. Contractor shall review the Contract Documents to determine the Project's constructability. All issues identified as creating a risk to the project or potentially impacting constructability shall be identified in a written report submitted to both the Owner and the Engineer. At a minimum, the written report shall contain: (1) a description of the constructability issues with background information; (2) a summary description of the potential impact to design, budget, and schedule; (3) option for addressing the issue; and (4) any proposed value engineered items for consideration by the City and the Engineer.
2. Develop a phase procurement strategy for review and approval by the Owner to support the Project Schedule requirements.

2.1.4 General Construction Services

1. The Contractor shall construct the project pursuant to the Contract Documents and in accordance with the Schedule requirement for the Project.

2. The Contractor shall schedule and conduct regular meetings at which the Owner, Owner's Representative, and Engineer can discuss the status of the Work. The Contractor shall prepare and promptly distribute agendas and minutes of all meetings.
3. The Contractor shall develop a system of cost control for the Work, including regular monitoring of actual costs for activities in progress and estimates for uncompleted tasks and proposed changes. The Contractor shall identify variance between actual and estimated costs and report the variance to the Owner and shall provide this information for review.

2.2 HVAC Replacement Projects

The projects listed below are ranked in terms of priority. While the University intends to complete all listed projects, only the projects that can be completed within the established budget shall be fully executed.

2.2.1 Lakeview Residence Hall

1. Replace boiler, air handling unit, roof top unit, and install controls throughout the building.

2.2.2 University Village Residence Hall

1. Replace air handling unit, replace roof top unit, and install controls throughout the building.

2.2.3 Helen White Dorm

1. Replace 6 air handling units and install controls throughout the building

2.2.4 Stuart Irby Science Building

1. Replace boiler and install controls throughout the building.

2.2.5 Hood Library

1. Replace air handling unit, boiler, and install controls throughout the building

Section 3: Project Documents

3.1 Proposal Package Access

You can access the proposal package by utilizing this link: <https://bit.ly/BU-HVACRFP>

Section 4: Insurance

4.1 Insurance

It is the policy of Belhaven University to ensure that its vendor partners meet minimum insurance requirements. Accordingly, listed below are the general insurance requirements for its vendor partners.

1. Workers Compensation insurance as prescribed by the law of the state of Mississippi, and in no event less than one million dollars (\$1,000,000) for each employee, one million dollars (\$1,000,000) for each accident, and one million dollars (\$1,000,000) policy limit, with endorsements waiving subrogation and including a primary and non-contributory clause;

2. Commercial General Liability (“CGL”) Insurance (with Belhaven University as an additional insured) with limits of at least one million dollars (\$1,000,000) per occurrence, two million dollars (\$2,000,000) annual aggregate, one million dollars (\$1,000,000) products/completed operations and two million dollars (\$2,000,000) annual aggregate per location / per project, with endorsements waiving subrogation and including a primary and noncontributory clause.
3. Business Auto Liability Insurance with limits of at least one million dollars (\$1,000,000) combine single limit, per accident, for owned, non-owned, and hired autos, with an endorsement waiving subrogation.

Upon selection, the selected firm must produce a Certificate of Liability Insurance within 10 days.

Section 5: Proposal Format

Your response to the RFP should follow the format laid out in this section. The proposal should employ the appropriate covers and tabs as depicted in the subsections below. The proposal should be no longer than 25 pages, with the front and back constituting two pages.

5.1 Proposal Cover Letter & Table of Contents

In your cover letter, please provide a statement of interest along with a brief explanation of your firm’s unique qualifications as they pertain to the work of this project.

5.2 Proposer’s Information

5.2.1 General Information

Provide your company’s information including your address, years in business, experience in healthcare, your mission/values, and your familiarity with the Mississippi area. Share a history of the company, the types of projects delivered, and general expertise in construction.

5.2.2 Pending Transactions

Identify if your firm is currently for sale or involved in any transaction to expand or to be acquired by another business entity. If yes, please explain the impact on the organization and management efforts.

5.2.3 Litigation

Provide details of any past or pending litigation, or claims filed, against your company that may affect your performance.

5.2.4 Project Default

Identify if your firm has ever defaulted, failed to complete any work, or otherwise been discharged prior to the completion of the project. If yes, stipulate when, where, and why.

5.3 Personnel & Organization

Provide a description of how your team internally operates and communicates. Elaborate on how you approach teamwork and how different teams collaborate.

5.3.1 Team Resumes

Provide resumes for key individuals who will be assigned to this project. Include information on their years in the industry, recent projects, and experience in healthcare.

5.3.2 Organization Chart

Provide a graphic representation of your team's organization chart, explaining the relationship between team members through lines of authority and communication.

5.4 Project Experience

5.4.1 Overall Project Experience Summary

Provide an overall description of your experience working in an higher education setting. Elaborate on your experience in higher education and working with active campuses.

5.4.2 Representative Projects

Identify and describe the proposed team's past projects that implemented the services required in this RFP. Please provide at least 3 (three) project examples, but no more than 7 (seven). These project highlights should include the following information:

- Project name and location
- Description of the project and your scope of work
- Name of Owner
- Color image of the project
- Total Project Value

5.5 Design Management Approach & Philosophy

5.5.1 Construction Management Approach

Describe your overall approach to Construction Management in terms of collaboration, capacity to meet expectations, conflict resolution, and ability to deliver projects on time and budget. Offer insight into what sets your firm apart and why your firm should be selected.

5.5.2 Quality

Describe your quality assurance program. Explain the methods used to ensure quality control during the Construction phase of the project. Provide specific examples of how these techniques and procedures are regularly employed. Elaborate on quality control inspections, pre-installation meetings, testing, submittal control, commissioning procedures, and other items you deem relevant.

5.5.3 Budget

Describe your process for designing projects to an established budget. The projects for this RFP will be funded by a Federal Grant. As such, the design will need to adhere to the provided budgets. Further, describe your processes for cost control measures and developing value engineering solutions.

5.5.4 Schedule

Describe how you will develop, maintain, and update the project schedule during design. Describe your approach to assuring timely completion of design, including methods for schedule recovery, if necessary. Please include specific examples and techniques.

5.5.6 Technology

Describe what technology you employ to effectively design projects. Explain how this technology improves operational efficiencies.

5.5.7 Project Communication

Describe how you communicate between Trade Partners, Stakeholders, and Owners. Utilize examples to showcase your effectiveness in communicating project status, the need for decisions, and milestones.

5.6 Proposed Fees, Rates, & Schedule

5.6.1 Provide a Fee Proposal

Provide a Fee Proposal for the project based on the drawings and confirm resources and timelines will be met to keep the project on schedule. Belhaven University's intent is to have a stipulated fee that encompasses both design and construction administration.

5.6.2 Provide Rates

Provide rates for each position necessary to complete the project in its entirety. You may submit your standard rate sheet.

5.6.3 Provide a Schedule

Provide a milestone design schedule to complete the design of the project.

Section 6: Selection Process

6.1 Criteria

The award of this RFP is subject to the terms and conditions contained herein, in addition to any supplemental terms and conditions developed by Belhaven University during the course of this RFP process.

Quality of service, pricing, products, schedule, and other terms will be an integral part of the decision selection process.

We reserve the right to award this RFP bid, in whole or in part, to the Respondent that can best meet the needs required by the RFP according to our judgment.

Belhaven University reserves the right to request either all or just a shortlisted group of firms to participate in interviews. Firms may be selected, based on their submittal information, to present their proposal and

qualifications to the Belhaven University selection committee. Firms participating in the interview process are asked to have the proposed Project team members who will participate in this present for this meeting.

6.1.1 Specified Criteria and Potential Awarded Point Structure

Criteria	Total Potential Points
Key Personnel The education, experience, and accomplishments of key personnel will be evaluated to determine the degree to which they possess the qualifications to perform their proposed duties under the contract.	10 Points
Technical Approach The proposal will be evaluated on how the offeror intends to organize, staff and manage the contract and the means that will be used to accomplish the contract requirements. The degree to which the proposal demonstrates an understanding of the requirements will be evaluated, as well as the offeror's planned management of consultants and subcontractors, if applicable.	15 Points
Past Performance The offeror's past performance on related contracts will be evaluated to determine, as appropriate, successful performance of contract requirements, quality and timeliness of delivery of goods and services, effective management of subcontractors, cost management, level of communication between the contracting parties, proactive management and customer satisfaction.	20 Points
Proposed Cost The offeror's Proposed Cost will be evaluated with the highest number of points being given to the most responsible Proposed Cost number.	35 Points
Proposed Schedule The offeror's Proposed Schedule will be evaluated for efficiency and reasonable execution expectations.	25 Points

Section 7: Terms, Conditions, and Required Clauses

7.1 Cost Incurred in Responding

All costs directly or indirectly related to preparation of a response to the RFP or any oral presentation required to supplement and/or clarify a Proposal which may be required by the City shall be the sole responsibility of and shall be borne by the participating Proposers.

7.2 Withdrawal of Proposals

A representative of the company may withdraw a Proposal at any time **prior to** the RFP submission deadline, upon presentation of acceptable identification as a representative of such company.

7.3 Tax Exemption

Belhaven University is exempt from Federal Excise and State Sale Tax; therefore, tax must not be included in any contract that may be awarded from this RFP.

7.4 Unauthorized Communications

After release of this solicitation, Proposers' contact regarding this RFP with members of the RFP evaluation, interview or selection panels, employees of Belhaven University or officials of Belhaven University other than those indicated in this RFP is prohibited and may result in disqualification from this procurement process. No officer, employee, agent or representative of the Proposers shall have any contact or discussion, verbal or written, with any members of Belhaven University, members of the RFP evaluation, interview, or selection panels, the University's staff or Contractors, or directly or indirectly through others, seek to influence any Belhaven University Board of Trustee member, staff, or Contractors regarding any matters pertaining to this solicitation, except as herein provided. If a representative of any Proposers violates the foregoing prohibition by contacting any of the above listed parties with whom contact is not authorized, such contact may result in the Proposers being disqualified from the procurement process. Any oral communications are considered unofficial and non-binding with regard to this RFP.

7.5 Lobbying

Byrd Anti-Lobbying Amendment, 31 U.S.C. 1352, as amended by the Lobbying Disclosure Act of 1995, P.L. 104-65 [to be codified at 2 U.S.C. § 1601, et seq.] - Contractors who apply or bid for an award of \$100,000 or more shall file the certification required by 49 CFR part 20, "New Restrictions on Lobbying." Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier shall also disclose the name of any registrant under the Lobbying Disclosure Act of 1995 who has made lobbying contacts on its behalf with non-Federal funds with respect to that Federal contract, grant or award covered by 31 U.S.C. 1352. Such disclosures are forwarded from tier to tier up to the recipient.

7.6 No Government Obligation to Third Parties

The recipient and contractor acknowledge and agree that, notwithstanding any concurrence by the US Government in or approval of the solicitation or award of the underlying contract, absent the express written consent by the US Government, the US Government is not a party to this contract and shall not be subject to any obligations or liabilities to the recipient, the contractor, or any other party (whether or not a party to that contract) pertaining to any matter resulting from the underlying contract.

7.7 Equal Opportunity Requirements

This contractor and subcontractor shall abide by the requirements of 41 CFR 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, sexual orientation, gender identity, national origin, and for inquiring about, discussing or disclosing compensation. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability or veteran status.

7.7 Davis-Bacon Act and Prevailing Wage

Under the Davis-Bacon and Related Acts (DBRA), all contracts awarded under Federal assistance agreements (grants) in excess of \$100,000 that involve the employment of mechanics or laborers require contractors and subcontractors to comply with the overtime provisions of the Contract Wage Hours and Safety Standards Act (CWHSSA) at 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations in 29 CFR Part 5 and 2 CFR 200 Appendix II(E). By accepting this RFP, you agree to comply with the requirements of CWHSSA described below, in addition to the DBRA Requirements for Contractors Under EPA Grants. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. For the purposes of this provision, the terms "laborers and mechanics" include watchpersons and guards.