

**REQUEST FOR PROPOSALS
Zoo Electrical Improvements Phase II**

ZOOLOGICAL SOCIETY OF PHILDELPHIA

CONTENTS

	Page
I. Statement of Purpose	2
II. Project Description	2
III. Scope of Services	3
IV. Proposal	7
V. Proposal Review	12

Appendix A

Site Plan

Appendix B

Philadelphia Tax Status Requirement

Appendix C

Equal Opportunity Participation Form

Appendix D

Proposed contract for professional services

I. STATEMENT OF PURPOSE

The purpose of this project is to design, document, and administer the construction of improvements to the Zoo's electrical system. Specifically the goal is to address several elements of the system that are not adequate to meet current needs.

Key goals will be to add an emergency generator and related switching for Bear Country and add electric meters to Zoo buildings throughout the Campus so that we can more efficiently monitor electric consumption.

II. PROJECT DESCRIPTION

Program & Budget

Under the initial phase of the electrical upgrades project improvements to Bear County interior lighting, transformer upgrade, and new switching was completed. Phase II of the upgrade project would be to add an emergency generator connection, a manual transfer switch and a portable 150 KV generator to the Bear country facility. This improvement is necessary to comply with life safety requirements of the USDA for the polar bears that are considered marine mammals.

In addition, the zoo has a need to monitor its electrical usage for all of its major buildings in order to better implement our sustainability program. The project will encompass the addition of electrical meters to 12 buildings (See Appendix A) so that the zoo can manage energy use. The new meters must have the capability to communicate with our existing Johnson Controls FX building digital controllers supervised by a site-wide Tridium based WEB digital control system.

The attached plan identifies the location of the proposed improvement.

The total budget is \$100,000 including design.

Process & Schedule

The design of major infrastructure improvements is overseen by a "Core" team of Zoo staff including the Vice President for Facilities, the Director of Facilities, and a project manager. In addition, the Sustainability Manger and the Facilities Engineering Superintendent will be key members of the Zoo project team for the design of the Electrical Improvements Phase II project.

Project Schedule

Proposals due-	January 9, 2009
Design team selected-	January 20, 2009
Construction bid documents issued-	April 30, 2009

Construction contract awarded-
Construction competed-

June 19, 2009
November 30, 2009

III. SCOPE OF SERVICES

It is the Zoo's intent to hire an engineering firm with significant experience designing electrical distribution. The selected firm shall have the in-house capability to document the design and installation of the systems, all supporting control and electrical wiring, programming and any required trenching and landscape restoration under a single design contract. The proposing firms may utilize subcontracted design firms to provide any skills that are not represented in-house.

Concept/Schematic Design Phase

During this phase, the design professional shall work with the Zoo Staff to refine overall goals, parameters and guidelines for the design and construction of the project. This effort shall generally include the definition of functional criteria, design standards and alternate systems. The ultimate goal of this phase is to develop a design concept that will satisfy the functional requirements of the Zoo within the limits of the funds available. The design shall consist of appropriate plans depicting spaces, elevations and sections as may be necessary, outline specifications, and other documents that illustrate the scale and relationship of project components. Tasks may include:

- Evaluation of existing site conditions including the adequacy of existing site utilities to support the project.
- Conceptual design options (diagrams)
- Preliminary Budget Estimates
- Conceptual Phasing Plan for Construction
- Required subsurface investigations will be identified (to be contracted separately by the Zoo)
- Any required environmental investigation will be identified (to be contracted separately by the Zoo)
- Schematic Design of selected option
- Schematic Cost Estimate
- Preliminary Project Schedule (Construction Phasing)

Design Development Phase

Design development documents will present the approved schematic design in greater detail. Design drawings are organized according to a construction contract that includes site plans, dimensioned floor plans, horizontal and vertical utility distribution and special systems. Installation details and required restoration details are developed for review. Design development documents are submitted for regulatory review and approval. Tasks may include:

- Design Development Documents (plans, Single line diagrams, sections, details)

- Specification Development
- Preliminary Regulatory Review
- Updated Project Schedule
- Cost Estimate
- Identification/specification of all owner furnished equipment
- Telephone/Data Coordination
- Value Engineering
- Constructability Review (coordination)
- Restoration Selections & Specifications

Construction Document Phase

Construction documents describe in drawings, specifications, and other contract documents, the requirements for construction of the project. All schedules of equipment, materials and finishes are finalized. Technical and supplementary general specifications are completed. Receipt of all permits and regulatory approvals must occur before the completion of this phase. Tasks may include:

- Detailed Construction Drawings including Special Systems, Furnishings, Telephone/Data Layout
- Final Specifications
- Project Special Conditions to be coordinated with the Zoo
- Regulatory Approvals
- Multiple Construction Contract Definition and Preparation
- Development of Bid Alternates
- Construction Phase Schedule
- Final Construction Cost Estimate
- Submit Final Documents on diskettes

Construction Bid Phase

The design professional will assist the Zoo in explaining the requirements of the project and evaluating the responsiveness of construction bids. Tasks may include:

- Preparation of Addenda
- Pre-Bid Conferences
- Written Evaluation of Bids (required if not within 5%)

Construction Phase

The design professional will assist the Zoo and their designated construction manager in the administration and management of the construction contract(s). Tasks may include:

- Construction Monitoring

- Project Meetings (minimum two per month)
- Preparation of Meeting minutes
- Project Site Visits as required
- Response to Contractor Questions
- Shop Drawing Review/Approval
- Review of Requests for Substitutions/Approved Equals
- Contract Document Interpretation
- Contractor Payment Approval
- Change Order Evaluation
- Systems Startup and Checkout, coordination only
- Updated drawings and disks, reflecting all changes to plans and any significant systems.

General Project Requirements

The following requirements apply to all architectural, engineering and related professional service contracts:

1. All drawings for design submissions shall be prepared using AutoCAD Version 14 (or better) and in accordance with the AIA "CAD Layer Guidelines". Milestone submissions should be provided for Zoo review (3 sets maximum). The Design Professional shall be required to provide 6 sets of drawings and specs (as well as any addenda) for bidding purposes after all final Zoo reviews and comments have been received and incorporated. Reproduction costs should be included in the proposed reimbursable allowance. The Zoo shall provide any further additional printing of bid packages. Final drawings shall be provided on mylar as well as electronically.
2. As part of this contract, the Design Professional shall provide four (4) sealed sets of plans (per site) for permitting purposes and will be required to complete all paperwork necessary for municipal, state and/or federal approvals and/or permits. Any fees relating to these permits/approvals will be the responsibility of the Zoo.
3. It is the Zoo's intention to incorporate the latest developments in energy conservation measures into their design program when appropriate.
4. All designs produced under this program must be in accordance with the Americans with Disabilities Act, Title II.
5. Minutes of all design review meetings shall be prepared by the Design Professional and distributed to all attendees. The Design Professional shall keep logs of all submittals, RFIs and change orders and shall be cognizant of all schedule and budget updates.
6. Progress reports shall be prepared describing accomplishments, decisions and overall progress made during the period. Progress reports will be submitted with each payment request.

7. The Design Professional will provide all services necessary for; design review by Licenses & Inspections and other agencies having jurisdiction over the project, obtaining applications for permits prior to bid opening and will provide a list of all permits and approvals required for the project in the contract documents. This includes the required studies necessary to comply with current storm water management regulations.
8. The design professional shall perform all services in an expeditious manner consistent with the interests of the Zoo and of the highest professional quality. All work shall be in conformance with all applicable Zoo and City of Philadelphia standards and requirements.
9. The Design Professional shall obtain sign-off of all utilities from government agencies having jurisdiction.
10. Construction cost estimates shall be provided. Estimates shall be organized in accord with CSI format and incorporate contingencies and escalation appropriate to the project schedule.
11. The Design Professional shall accomplish the design services required under the contract so as to permit the award of a contract for the construction of the facilities designed at a price that does not exceed the project budget set forth in this proposal. When bids or proposals for the construction contract are received that exceed the estimated cost, the Design Professional shall perform such redesign and other services as are necessary to permit contract award within the estimated cost. These additional services shall be performed at no increase in the price of the contract. The design professional shall not be required to perform such services at no additional cost when the unfavorable proposals or bids are the result of conditions beyond his reasonable control. Lack of knowledge regarding bid climate does NOT constitute beyond reasonable control.
12. All work shall be reviewed and checked prior to submission to the Zoo. Reviews shall be performed by qualified design professionals not involved in the design work. It shall be the responsibility of the Design Professional to thoroughly coordinate drawings representing the work of different disciplines (architectural, mechanical, electrical, etc.).
13. All work shall be performed by or reviewed and approved by architects and engineers registered to practice the appropriate discipline in the State of Pennsylvania.
14. No asbestos abatement design is required on this project unless specifically noted in the Scope of Work section of this RFP.

15. The Zoo has developed front-end requirements. This is available in Microsoft Word and must be fully coordinated into front-end documents prepared by the Design Professional as a complete Project Manual.

IV. PROPOSAL

Form of Proposal

Submit three (3) copies of the proposal in letter size, three-ring or bound format. All proposals must include the following elements:

1. Understanding of the Project Requirements/Scope of Services.
2. Team organization that identifies the primary team members that will work on the project including each person's resume. It is imperative that the Project Manager assigned to the project be identified.
3. Narrative and visual examples of representative related project experience.
4. Provide five (5) client references with descriptions of the projects completed (design and construction), contact name and phone number.
5. Participation by Minority, Women, Disabled-Owned Businesses including the contract value assigned to Minority, Women or disabled- Owned businesses
6. Philadelphia Tax Status and Clearance Statement.
7. Fee proposal for the project.

Proposal Requirements and Evaluation Criteria

All proposals that meet the minimum requirements, e.g. experience, financial capability, etc., and the minimum submission requirements, will be reviewed and evaluated for completeness and responsiveness according to standards and selection criteria determined by the Zoo. Factors for consideration will be evaluated from information supplied in response to the RFP.

1. Understanding of the Project/Scope of Services/Schedule

Section II of this RFP generally details the minimum requirements of the scope of services for this project. In the preparation of their proposal the Design Professional is encouraged to expand or elaborate in a manner that reflects his understanding of the project and demonstrates his expertise and ability to perform all elements of the proposed scope of services.

The Design Professional shall provide a brief narrative that demonstrates his understanding of the project, i.e. project's goals, objectives, nature and scope of the work involved. Additionally, a brief description of the proposed project approach including a work plan and strategy is required along with a description of computer hardware and software to be utilized. Any expanded narrative addressing alternative approaches, adequacy of budget allocation and/or key design issues is encouraged and will be evaluated in its responsiveness to the stated project goals.

The Design Professional shall provide a proposed sequence of activities and schedule that demonstrates how the firm's approach will meet the stated objectives of the project within the time allotted for the design phase. The schedule may include ideas and concepts not included in the scope of services, but which may be beneficial to the Zoo. The schedule should be in the form of a bar chart and include the entire design phase. Major deliverables, key milestones and decision dates should be included in the schedule. Zoo review periods should also be noted.

2. Project Team Organization and Team Resumes

The Design Professional shall identify himself (including any joint venture partners or other associates) by listing the firm, address and telephone/fax numbers and contact person. If a joint venture or association between firms is proposed, describe the contractual relationship.

The proposal shall include a description of the proposed team in both narrative and chart form. The proposal should clearly indicate the relationship, roles and responsibilities of each organization and individual team member. **Key positions/individuals should be specifically identified by name and title, with narrative describing their respective areas of expertise, responsibilities and reporting.**

For each key team member, describe prior experience as it relates to the technical requirements of this project and the individual's position on the project team. Describe all relevant professional experience, academic degrees earned, professional licenses and awards, any special skills and supplementary training relevant to the requirements of this project.

Any proposed project staff who are not full-time employees of one of the corporate team members shall be clearly identified. Briefly describe their employment arrangement and availability for this project.

3. Related Project Experience

Provide narrative or visual descriptions (photographs and/or renderings) of projects designed by the Design Professional or other members of the Project Team, which are related to the project for which the proposal is being submitted. **Projects specifically relevant to the proposed project are much more important than quantity of experience.**

Though it will not disqualify your proposal if not given, the following information should be included for each related project:

- A. Project Name
- B. Client (corporation, public agency, etc.)

- C. General physical characteristics
- D. Special features, accomplishments or problems
- E. Construction value
- F. Specific services provided
- G. Dates of service
- H. Approximate consultant contract value
- I. Individual references. Include contact addresses and telephone numbers. A minimum of one reference shall be included for each project.

4. Participation by Minority, Women, Disabled-Owned Businesses

It is the policy of the Zoological Society of Philadelphia to promote the utilization of qualified businesses owned by minorities, women, the disabled and the disadvantaged (WBE/WBE/DBE/DSE). It is important to the Zoo to partner with businesses with similar policies regarding MBE/WBE/DBE/DSE businesses. To this end the Zoo has established a participation goal of 40% for MBE businesses and 10% for WBE businesses for this project as part of its Equal Opportunity Plan. The Project design team will be considered a participant in the plan and the participation commitments submitted in this RFP will be monitored for compliance with the plan.

Certified M/W/DS-BE Firms

A. Only businesses that are owned, managed and controlled, in both form and substance, as M/W/DS-BE firms shall participate in this Project's Economic Opportunity Plan. To ensure this standard, all businesses, including joint ventures, must be certified by the Philadelphia Office of Economic Opportunity or members of the Pennsylvania Unified Certification Program (UCP). Both agencies are authorized to certify such enterprises.

B. M/W/DS-BE certification should not be the sole determination of a Bidder's or Contractor's financial or technical ability to perform specified work. The Owner reserves the right to evaluate the Contractor's or Subcontractor's ability to satisfy financial, technical, or other criteria separate and apart from said certifications before bid opening. Pre-qualification conditions and requirements shall be conveyed in a fair, open and non-discriminatory manner to all.

C. The Owner recognizes that M/W/DS-BE certifications may expire or the firm may experience de-certification by an authorized governmental entity. Certifications that expire during a firm's participation on a particular phase of the Project may be counted toward overall goals for participation ranges. However, said firm **MUST** become re-certified prior to consideration for future goal credit in the Project's Plan. If a firm has been de-certified, said firm would not be eligible to participate.

D. An M/W/DS-BE and/or DBE submitting as the prime contractor is required, like all other Participants, to submit a bid and/or RFP that is responsive to the City

of Philadelphia Reauthorized Executive Order 02-05, and applicable law, and will only receive credit, in its certification category, for the amount of its own work or supply effort on the specified work in the bid and or RFP. In order to maximize opportunities for as many businesses as possible, a firm that is credited in two or more categories (e.g. MBE and WBE, or WBE and DSBE) will only receives credit as either an MBE or WBE or DSBE. The firm will not be credited toward more than one category. Bidders/Respondents will note with their submission which category, MBE or WBE or DSBE, is submitted for credit.

V. Non-Compliance

A. In cases where the Owner has cause to believe that a Participant, acting in good faith, has failed to comply with the provisions of the Plan, the Owner and/or the City of Philadelphia Oversight Committee, with the assistance and consultation of the appropriate agencies and professional entities, shall attempt to resolve the noncompliance through conciliation and persuasion.

B. In conciliation, the Participant must satisfy the Owner and the City Of Philadelphia Oversight Committee that they have made their *best and good faith efforts* to achieve the agreed upon participation goals by certified M/W/DBE firms. *Best and good faith efforts* on the part of the Participant/Contractor include:

- 1) Entering into a contractual relationship with the designated M/W/DBE firm in a timely, responsive and responsible manner, and fulfilling all contractual requirements, including payments, in said manner.
- 2) Notifying all parties, including the Owner, the M/W/DS-BE firm, the City of Philadelphia Oversight Committee and all relevant Participants, of any problems in a timely manner.
- 3) Requesting assistance from the Owner and/or the City of Philadelphia Oversight Committee in resolving any problems with any M/W/DS-BE firm.
- 4) Making every reasonable effort to appropriately facilitate successful performance of contractual duties by a M/W/DS-BE firm through timely, clear and direct communications.

C. In cases where the Owner and/or the Oversight Committee has cause to believe that any Participant has failed to comply with the provisions of the Plan, they shall conduct an investigation.

D. After affording the Participant notice and an opportunity to be heard, the Owner and/or the Oversight Committee are authorized to take corrective, remedial and/or punitive action. Such actions may include, but are not limited to:

- 1) Declaring the Participant as non-responsible and/or non-responsive, with a determination as ineligible to receive the award of a contract, continue a contract and/or ineligible for any other future contracts affiliated with this Plan;
- 2) **Suspending the violating Participant from doing business with the Owner;**

3) Withholding payments to the violating Participant; and/or

4) Pursuing and securing any relief which the Owner and/or the Oversight Committee may deem to be necessary, proper, and in the best interest of the Owner and the Project, consistent with applicable policy and law.

E. A Participant may appeal a determination of non-compliance with this Plan by filling a written grievance with the Owner and/or its Oversight Committee.

F. Within five (5) working days the Owner and/or the Oversight Committee shall issue and serve a written notice/determination, together with a copy of the grievance as filed, to all persons named in the grievance.

Please include in your proposal the committed participation levels for MBE/WBE/DBE/DSE businesses and the attached solicitation form should your proposal fail to meet the goals for this project (Appendix C). Participation commitments will be incorporated onto the final agreement.

5. Philadelphia Tax Status and Clearance Statement

The Philadelphia Tax Status and Clearance Statement (Appendix B) must be executed and submitted with the proposal by the Design Professional and sub-consultants.

6. Fee Proposal – Separate Enclosure

The design professional shall submit with his proposal a lump sum fee for performing its scope of services for the project. An allowance should be made for all direct costs, which will be reimbursed on the basis of actual expenses incurred. Copies of receipts must be submitted for reimbursement. The lump sum fee must cover all phases of the project as described in Section III *unless otherwise noted*. The Design Professional shall identify all major tasks to be provided under each phase. To support and justify the lump sum quotations and for information purposes, include a breakdown by phase and task, of hours and hourly rates for all personnel, including sub-consultants, proposed for this project. Identify the amount of the penalty, if any, associated with a delay in the project as described in Section II.

The Zoo reserves the right to utilize this information for the purpose of (i.) developing a payment schedule that fairly allocates the applicable lump sum fee of the Design Professional selected for contract award and (ii.) setting fees for any additional services (i.e. beyond the scope of the executed contract) that may be requested by the Zoo. An adjustment in rates will not be considered unless the project runs past the contract limit.

7. Contract Acceptance-

The design professional shall prepare a written indicating that they accept all of the terms of the proposed contract for professional services detailing any exceptions.

V. **PROPOSAL REVIEW**

Additional Factors Affecting Selection

- The project team's history and capability to provide unique and innovative solutions to problems will be considered.
- The project team's demonstrated experience and capability to complete all design work within established schedule and budget.
- The project team's history of producing products that can be built within the prescribed time and budget requirements may also be evaluated.
- The reputation of the Design Professional, as determined by inquiries with previous and current clients and other references.
- Experience on prior zoo projects.
- Local presence in the City of Philadelphia.
- Compensation/Fee Proposal.
- Insurance coverage

Zoo Rights

The Zoo reserves and may exercise the following rights and options with respect to this selection process.

1. To reject any and all proposals and reissue RFP at any time prior to execution of a final contract.
2. To supplement, amend, or otherwise modify this RFP at any time prior to selection of one or more proposers for negotiation and to cancel this RFP with or without issuing another RFP.
3. To negotiate to accept or reject any or all of the items in any proposal and award the contract in whole or in part if it is deemed in the Zoo's best interest to do so.

4. To reject the proposal of a proposer that, in the Zoo's sole judgment, has been delinquent or unfaithful in the performance of any contract with the Zoo, is financially or technically incapable or is otherwise not a responsible proposer.
5. To waive any minor informality, defect or deviation from this RFP that is not material to the proposal.
6. To request that some or all of the proposers clarify, modify or supplement proposals.
7. As an aid in the selection process, the Zoo may request interviews or oral presentations from one or more proposers prior to commencement of any contract negotiations.
8. As an aid in the selection process, the Zoo may request to visit the proposer's local office as a means of verifying the consultant/sub-consultant's capability to perform the work.
9. The Zoo may request to inspect projects referenced in the proposer's proposal.
10. The Zoo may request recent financial statements from proposers as a means of verifying their capability to perform the work.
11. The Zoo may conduct investigations with respect to the qualifications of each proposer and call upon references.