



RFP No. WTR085

PROFESSIONAL, TECHNICAL AND EXPERT SERVICES

City of Portland, Oregon
March 9, 2010

REQUEST FOR PROPOSALS

for

Fulton Pump Station Replacement

PROPOSALS DUE: April 5, 2010 by 4:00 p.m.

Envelope(s) shall be sealed and marked with RFP # and Project Title.

Submit one (1) original and ten (10) complete copies, along with one (1) CD with an electronic copy of the Proposal to:

City of Portland Water Bureau
Attn: Andrew Urdahl
1120 SW 5th Avenue, Room 600
Portland, OR 97204

Refer questions to:

Andrew Urdahl
Phone: (503) 823-7490
Fax: (503) 823-9407
Email: andrew.urdahl@ci.portland.or.us

GENERAL INSTRUCTIONS AND CONDITIONS

DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS

– The City of Portland seeks to extend contracting opportunities to Minority Business Enterprises, Women Business Enterprises and Emerging Small Businesses (M/W/ESBs) in order to promote their economic growth and to provide additional competition for City contracts. Therefore, the City has established an overall 20% utilization goal in awarding PTE contracts to ESBs. No goal is set for the use of M/WBE firms, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

ENVIRONMENTALLY PREFERABLE PROCUREMENT

– In accordance with the City's Sustainable City Principles and the City's Sustainable Procurement Policy, the City of Portland values the use of products and services that minimize the negative human health and environmental impacts of City operations. Therefore, proposers are encouraged to incorporate environmentally preferable products or services into their responses wherever possible. "Environmentally preferable" means products or services that have a lesser or reduced effect on human health and the environment when compared with competing products or services that serve the same purpose. This comparison may consider raw materials acquisition, production, manufacturing, packaging, distribution, reuse, operation, maintenance, or disposal of the product or service. To view the above City policies go to www.portlandonline.com and navigate to "Charter, Code & Policies Documents".

INVESTIGATION – The proposer shall make all investigations necessary to inform it regarding the service(s) to be performed under this request for proposal.

SPECIAL CONDITIONS – Where special conditions are written in the Request for Proposal, these special conditions shall take precedence over any conditions listed under the Professional, Technical and Expert Service "General Instructions and Conditions".

CLARIFICATION OF REQUEST FOR PROPOSAL – Proposers who request a clarification of the RFP requirements must submit questions in writing to the person(s) shown in the REFER QUESTIONS TO section on the cover of this RFP, or present them verbally at a scheduled pre-submittal conference, if one has been scheduled. The City must receive written questions no later than the date stated herein. The City will issue a response in the form of an addendum to the RFP if a substantive clarification is in order.

Oral instructions or information concerning the Request for Proposal given out by Bureau or Office managers, employees or agents to prospective proposers shall not bind the City.

ADDENDUM – Any change to this RFP shall be made by written addendum issued no later than 72 hours prior to the proposal due date. The City is not responsible for any explanation, clarification or approval made or given in any manner except by addendum.

COST OF PROPOSAL – This Request for Proposal does not commit the City to pay any costs incurred by any proposer in the submission of a proposal or in making necessary studies or designs for the preparation thereof, or for procuring or contracting for the services to be furnished under the Request for Proposal.

CANCELLATION – The City reserves the right to modify, revise or cancel this RFP. Receipt and evaluation of proposals or the completion of interviews do not obligate the City to award a contract.

LATE PROPOSALS – Proposals received after the scheduled closing time for filing will be returned to the proposer unopened.

REJECTION OF PROPOSALS – The City reserves the right to reject any or all responses to the Request for Proposal if found in the City's best interest to do so. In the City's discretion, litigation between the City

and a proposer shall be cause for proposal rejection, regardless of when that litigation comes to the City's attention and regardless how the consultant's proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers concerned about possible rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

CITY OF PORTLAND BUSINESS LICENSE – Successful consultant shall obtain a current City of Portland Business License prior to initiation of contract and commencement of the work.

WORKERS' COMPENSATION INSURANCE – the successful consultant shall be covered by Workers' Compensation Insurance or shall provide evidence that State law does not require such coverage.

CERTIFICATION AS AN EEO AFFIRMATIVE ACTION EMPLOYER

– Proposers must be certified as Equal Employment Opportunity Affirmative Action Employers as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with Procurement Services, City of Portland, prior to contract execution.

EQUAL BENEFITS PROGRAM

– Proposers must provide benefits to their employees with domestic partners equivalent to those provided to employees with spouses as prescribed by Chapter 3.100 of the Code of the City of Portland. The required documentation must be filed with Procurement Services, City of Portland, prior to contract execution.

CONFLICT OF INTEREST

– A proposer filing a proposal thereby certifies that no officer, agent or employee of the City who has a pecuniary interest in this Request for Proposal has participated in the contract negotiations on the part of the City, that the proposal is made in good faith without fraud, collusion or connection of any kind with any other proposer of the same call for proposals, and that the proposer is competing solely in its own behalf without connection with or obligation to, any undisclosed person or firm.

CONFIDENTIALITY

– All information submitted by proposers shall be public record and subject to disclosure pursuant to the Oregon Public Records Act (ORS 192.410 et seq.), except such portions of the proposals for which proposer requests exception from disclosure consistent with Oregon Law. Any portion of a proposal that the proposer claims constitutes a "trade secret" or is "confidential" must meet the requirements of ORS 192.501, ORS 192.502 and/or ORS 646.461 et seq. If the entire proposal is marked as constituting a "trade secret" or being "confidential," at the City's sole discretion, such a proposal may be rejected as non-responsive.

If a request to inspect the proposal is made, the City will notify the proposer of the request. If the City refuses to release the records, the proposer agrees to provide information sufficient to sustain its position to the District Attorney of Multnomah County, who currently considers such appeals. If the District Attorney orders that the records be disclosed, the City will notify the proposer in order for the proposer to take all appropriate legal action. The proposer further agrees to hold harmless, defend and indemnify the City for all costs, expenses and attorney fees that may be imposed on the City as a result of appealing any decision regarding the proposer's records.

The Chief Procurement Officer has the authority to waive minor irregularities and discrepancies that will not affect the competitiveness or fairness of the solicitation and selection process.

These Professional, Technical and Expert Services Request for Proposal "General Terms and Conditions" are not to be construed as exclusive remedies or as a limitation upon rights or remedies that may be or may become available under ORS Chapter 279.

PART I

CONTRACT REQUIREMENTS

SECTION A

GENERAL INFORMATION

1. INTRODUCTION

The City of Portland (City) Water Bureau strives to provide high quality water to enhance the public health and safety and contribute to the economic viability and livability of the Portland metropolitan region. We are a recognized leader among water service agencies across the country.

This project aligns with the Portland Water Bureau (PWB) mission statement of providing reliable water service to customers as well as being responsible stewards of the public's water infrastructure and natural resources.

The Fulton Pump Station (FPS) is one of two pumping stations that supply drinking water to PWB's Burlingame Service Area (BSA). This service area includes the majority of Southwest Portland, and also includes wholesale customers. The Fulton Pump Station will be replaced in order to accommodate Portland's current and future needs in terms of potable water demands and fire flow protection.

2. BACKGROUND

PROJECT BACKGROUND

In September 2006, the "Burlingame Service Area Supply Facilities Master Plan" was completed for the PWB. As one of the improvements recommended in the BSA Master Plan, a subsequent Basis of Design Report (BDR) for the FPS rehabilitation and upsizing project was published in February 2007. The BDR provided a planning and preliminary engineering evaluation of the FPS Improvements Project which consisted of significant upgrades of the pump station structure and of all electrical and control equipment, in addition to replacing the six existing pump units, the suction and discharge piping and headers, and the motor control cabinet units. A number of additional improvements were also recommended to upgrade the overall condition and reliability of the pump station.

The original plan was to rehabilitate the existing pump station facility. Subsequently, replacing Fulton Pump Station and building a new facility on the existing pump station site was proposed. After further examination and analysis of the existing station in 2007 and 2008, it was determined that the option of reconstructing a new station at the existing location was not practical, was too expensive, would take too long, and presented an operational risk to the City. A decision was ultimately made to construct a new pump station facility at an alternate location.

The current proposed project will construct a new pump station facility inside Willamette Park east of SW Macadam Avenue, located in the confluence of the vacated right-of-way (ROW) of SW Bond and SW Nevada Streets. In lieu of a BDR, a Work Plan that generally describes the current project is attached as Exhibit B.

The overall goal of this project is to provide a reliable supply to the BSA capable of meeting the installed peak day capacity of 12 million gallons per day (MGD) expandable to 18 MGD through the year 2025 for the service area.

BACKGROUND AND SYSTEM DESCRIPTION

The BSA portion of the PWB water supply and distribution system is located in southwest Portland and is served from the Burlingame and Westwood Tanks. The Burlingame and Westwood Tanks supply water to a number of pumped and regulated pressure zones within the BSA. The BSA also serves several wholesale customers.

The current configuration of the BSA supply pump stations, pump mains and storage tanks has limited redundancy and is subject to several key vulnerabilities. Two parallel supply systems exist for the BSA; the FPS to Burlingame Tanks system and the Carolina Pump Station CPS to Westwood Tank system. The loss of any single component of one of these two parallel systems would result in the loss of that half of the BSA supply system.

The original FPS is located at 0540 SW Nevada Street between SW Macadam Avenue and SW Virginia Avenue and was built in 1912 as a one room pump house. The FPS has been subsequently expanded to its maximum capacity of 12 MGD.

The FPS supplies the primary water storage tanks of Burlingame Nos. 2, 3, & 4. From the Burlingame tank complex, water is distributed to the majority of southwest Portland either by direct supply, or by feeding additional storage tanks.

Approximately 15 neighborhoods are serviced by this system which also provides water to 5 wholesale customers including Tualatin Valley Water District (TVWD), Valley View Water District, Lake Grove Water District, City of Tigard and Lake Oswego. Eight storage tanks are fed in succession by FPS via Burlingame tanks. There are over 15,800 water service connections in the City of Portland that are supplied by this pump station.

The new pump station will replace the existing pump station and will be located within Willamette Park northeast of the intersection of SW Macadam Avenue and SW Nevada Street. The proposed pump station will be designed to a minimum installed capacity of 12 MGD expandable to 18 MGD. Piping to the new pump station will be designed to the ultimate capacity of 18 MGD. It is anticipated that the existing pump station will remain in service for two years after the new pump station is constructed.

Several key design issues associated with this project are summarized below and will need to be addressed.

KEY DESIGN ISSUES

1. There are several zoning overlays associated with the new location of the pump station which will require the following approvals:

Land Use Reviews:

- Type III Conditional Use Review (CU)
- Type III Zone Map Amendment (ZC)
- Type III Design Review (DZ)
- Type II Greenway Review (GW)

In addition, the location is within the Federal Emergency Management Agency (FEMA) 100-yr floodplain and must satisfy City of Portland Building Permit requirements.

2. A Public Involvement Plan has been developed for the project to solicit public input on the external building features. Development of architectural drawings for optional exterior treatments will be required. Several public meetings and open houses are also scheduled as part of the Public Involvement Plan, attached as Exhibit E.
3. A records request for contaminants in the area was recently completed by the Bureau of Environmental Services (BES). Findings show potential contamination of soils and groundwater from an old Rodda Paint Property approximately 40 feet west of the pump station location. A follow-up analysis of soil and groundwater samples will need to be completed during the preliminary phase of the project. It is anticipated that the successful Proposer for the project will either coordinate sampling and analysis with the BES Materials and Testing Laboratory or have an independent subcontractor provide this service. Samples shall be characterized to determine any on-site contamination and provide recommendations for appropriate mitigation in accordance with any and all permit requirements for the project.

4. According to City of Portland's Geographic Information System (GIS) information, the new location of the pump station is within an area designated as a high earthquake hazard. Geotechnical evaluation for the new site will require a site-specific seismic analysis which will need to consider liquefaction and shallow groundwater in the area due to its proximity to the Willamette River.

3. SCOPE OF WORK

The City of Portland Water Bureau is seeking proposals from individuals, engineering firms, teams or consultants, hereafter called "Proposer(s)," with demonstrated experience in the design of large capacity pump stations for use in public water systems, specifically for the design of Fulton Pump Station Replacement Project (Project). PWB proposes to engage the successful Proposer for the following services:

Key features of the Project include the following:

- Engineering Project Management
- Energy Trust of Oregon Study
- Geotechnical Evaluation
- Floodplain Analysis
- Design and construction of a new pump station facility
- Compliance with City's 2009 Green Building Policy, as applicable
- Hydraulic and Mechanical Design
- Storm and Sewer Management
- Electrical Control, Instrumentation and Telemetry
- Structural Engineering
- Civil Site Work and Piping
- Building Design
- Corrosion Design
- O&M Manuals
- Architectural Design Services
- Landscaping Design
- Public Involvement
- Permits
- Assistance During Bidding
- Engineering Support During Construction
- Start-up and Testing Services

A description of associated work tasks required for the Project is detailed under Part I, Section B, Work Requirements.

4. PROJECT FUNDING

The City has not determined the anticipated cost for the requested services. The Proposer's proposal shall include the Proposer's true estimated cost to perform the work irrespective of the City's budgeted funds for this work.

SECTION B

WORK REQUIREMENTS

1. TECHNICAL OR REQUIRED SERVICES

The successful Proposer shall be responsible for all work necessary to develop and complete all documents for the successful construction and completion of the Project and for providing design, construction and post-construction support.

Proposer(s) must consider all the requirements in this RFP. Final requirements of the Project may differ to some degree from those included here and will be established during contract negotiations with the successful Proposer.

The following is a more detailed description of the required services. The successful Proposer shall work closely with designated City personnel to accomplish these items:

A. Engineering Project Management

1. The successful Proposer shall perform general administration and project management throughout Design and Bidding, and provide support services during Construction and Post Construction phases to ensure successful completion of all tasks and elements of the Project within the established scope, schedule and budget.
2. The successful Proposer shall be responsible for all deliverables in Part I, Section B, 3. Deliverables and Schedule of this Request for Proposal (RFP), including attending monthly meetings during Design and as requested by PWB Construction Manager (CM). Public outreach meetings will also be required and are defined in item D. Public Involvement.

B. Energy Trust Study

The successful Proposer shall prepare an Energy Trust of Oregon analysis and determine if the Project qualifies for the Customized Incentives Program. Services anticipated for this analysis/study include:

1. Contract with an Energy Trust certified Program Delivery Contractor (PDC) in order to perform the analysis.
2. Conduct a scoping study to determine the savings for pumps and variable frequency drives (VFDs) on pumping costs, and a customized lighting study including recommendations on other savings on the basis of efficiency.
3. Contract with an Allied Technical Assistance Contractor (ATAC), an Independent engineering firm contracted by Energy Trust, to perform the analysis.
4. Facilitate technical Review of ATAC study by PDC.
5. Develop specifications.
6. Evaluate contractor bids for installation.
7. Assist City to oversee installation and verification of the Project.
8. Facilitate paperwork associated with program incentives.
9. Assist with the application for the Oregon Business Energy Tax Credit (BETC), if requested by PWB based on the results of the analysis.

C. Design of Fulton Pump Station

The successful Proposer shall complete the following design tasks:

1. Geotechnical Evaluation
Conduct an evaluation of the soils around the pump station including, but not limited to:
 - a. Evaluation of surface and subsurface soil conditions at the pump station site, valve vaults and proposed suction and discharge piping. Evaluation should indicate bearing capacity, settlement, type of footings/pilings required, and any special construction requirements.
 - b. Evaluation of possible drainage problems and any mitigation measures required.
 - c. Evaluation of soil and groundwater contamination which may either be coordinated with BES Testing and Materials Laboratory or completed by an independent subcontractor.
 - d. Site-specific seismic analysis
2. Floodplain Analysis
Provide an evaluation of pump station construction impacts to the floodplain. Address and incorporate the relevant design requirements of 24.50 Flood Hazard Areas of the City Building Code, including but not limited to 24.50.050.D and Title 24.50.060.F.4 and F8.

3. Building Design and Structural Engineering

Determine size, layout and configuration of the building for the pump station with consideration of the following functional and design requirements:

- a. The pump station shall be reinforced concrete cast-in-place construction. Tilt-up concrete and concrete masonry unit (CMU) construction are not acceptable.
- b. Loading area internal to the station such that major components such as pumps, motors, and electrical motor control center (MCC) equipment can be loaded using the station's internal bridge crane.
- c. The pump station shall be a multi-level building and layout such that all electrical, instrumentation and other sensitive equipment are located on the 2nd floor and well above the flood protection level elevation.
- d. Building must accommodate a storage (~400 sq ft) facility and four public restrooms.
- e. Security features shall be installed and must meet minimum requirements of other PWB-owned pump station facilities. These features may include door alarms and locks, high security glazing on windows and/or interior security bars. Final security features will be negotiated with the successful Proposer.
- f. Aesthetic design elements are required due to mandatory design review, as well as public involvement process. A registered architect shall provide a minimum of three facade designs required for the Public Involvement process, of which one will be selected for the pump station. It is suggested that the three facades include the following or a combination thereof:
 - i. Face Brick with cast stone
 - ii. Stone Face
 - iii. Architectural/Fair face and/or textured concrete
- g. Comply with the City's 2009 Green Building Policy (<http://www.portlandonline.com/bps/index.cfm?c=50447&a=243213>) which requires that all new buildings or buildings undergoing major renovations achieve certain performance levels. The successful Proposer shall coordinate with PWB staff and other City entities to determine the requirements applicable to the project including these performance levels:
 - i. Recycle at least 85% of all construction, remodeling, and demolition waste.
 - ii. Improve water savings 30% beyond the Energy Policy Act of 1992 baseline code requirements.
 - iii. Use no potable water for building-related landscape irrigation, except for the first two years to establish plantings.
 - iv. Design and incorporate an eco-roof covering at least 70% of the roof and utilizing a high reflectance Energy Star rated roof material on the remaining roof areas, where practical. When an integrated eco-roof/Energy Star rated roof is impractical, a high-reflectance Energy Star rated roof material will be installed. An analysis to evaluate practicality of an eco-roof shall be documented. The analysis should, at a minimum, consider the following factors:
 - 1) Structural requirements and associated capital and maintenance costs
 - 2) Life-cycle cost analysis compared to other roofing options
 - 3) Access for construction and maintenance
 - 4) Benefits provided by an eco-roof (e.g. stormwater control, roof longevity, insulation to reduce heating or cooling)

- 5) Other factors specific to this project or design options for this project
 - v. Design and incorporate on-site renewable energy systems, as practical or as required by the State. (See for example: <http://oregon.gov/ENERGY/CONS/PublicSolar.shtml>)
- h. Because this building will be categorized as “unoccupied”, it does not have to be LEED Gold certified in accordance with the City's Green Building Policy. The successful Proposer is, however, encouraged to consider a variety of sustainable approaches in the design and construction of the project, such as:
 - i. Water efficiency for the building and landscaping
 - ii. Energy efficiency
 - iii. Construction waste management
 - iv. Construction activity pollution prevention
 - v. Use of natural light (daylighting)
 - vi. Materials choice (regional products, renewable products, low emitting materials).

4. Civil Site Work and Piping

Develop a design including the following:

- a. Site plan
- b. On-site piping layout to and from the station including other utilities (proposed and existing): power/electricity and telemetry.
- c. Drain system with a dechlorination chamber to allow for water to be drained from the Burlingame Pump Main (BPM) for maintenance or emergency purpose. The drain system design shall address local and state requirements for disposal of chlorinated water.
- d. Valve vault for suction supply connection to the 60-inch diameter Washington County Supply Line (WCSL).
- e. Regulated connection from WCSL to suction piping in SW Nevada Street.
- f. Suction supply connection to the SE Supply Main and valve connection in the vicinity of 0540 SW Nevada St., extending to the new pump station.
- g. Discharge supply connection and valve connection in the vicinity of 0540 SW Nevada St., extending to the new pump station.
- h. Portable pump connection points to the suction and discharge supplies for maintenance or emergency purposes.
- i. Replacement storm main and sewer force main for pump station, four restrooms, and catchment area.
- j. All required earthwork, landscaping, paving, road re-alignment and other site improvements as required by Public Involvement, Design, and Permitting.

5. Hydraulic and Mechanical Design

Design of internal piping layout and pumps required to pump from the WCSL or SE Supply Line to the Burlingame Tanks or Westwood Tanks. Design should include:

- a. A minimum of five (5) pumps in the new pump station with the preliminary design hydraulic capacities:
 - i. Average Day Demand (ADD): 3.5mgd (single pump operation, with a second pump configured for redundancy)
 - ii. To bridge the flows between 3.5 to 8.5 MGD:
 - 1) >3.5MGD: VFD Operation of two 3.5 MGD pumps staying within the Preferred Operating Region (POR) as per ANSI/HI 9.6.3.
 - 2) <8.5MGD: VFD Operation one 8.5 MGD pump operation, throttled down to minimum acceptable operating point still within the POR.

- iii. Peak Day Demand (PDD): 8.5 MGD (single pump operation, designed to operate at the higher dynamic head, with a second pump configured for redundancy)
 - iv. A jockey pump to bridge the flows from 0-4 MGD (night operation)
 - b. Each pump shall have the ability to draw water from either suction source, the WCSL or the SE Supply Line, with actuated valving remotely from the Water Control Center (WCC). Capability shall be possible with adjacent pumps out of service.
 - c. Layout plans for all piping, fittings and appurtenances required within pump station.
 - d. Selection of number, type and capacity of all pumps including design calculations and criteria supporting selections.
 - e. Selection of hydraulic control valves and related equipment.
 - f. Pump performance specifications and expected power consumption efficiencies.
 - g. Surge analysis of the Burlingame Pump Main (BPM), with:
 - i. Recommendation and design for surge relief valves and chlorinated water disposal.
 - ii. Recommendation for placement of vacuum breakers and air release valves along the BPM.
 - iii. Design of pumping facility to drain the BPM for maintenance.
 - h. Lighting, heating and ventilation systems for the buildings.
 - i. Noise suppression and vibration limits.
 - j. Perform a transient analysis on the pump main and incorporate surge relief valves into the design exterior to the pump station.

6. Electrical Control, Instrumentation and Telemetry Design

Design an electrical control and telemetry system for the pump station based on the established design criteria. Design should include but not be limited to the following:

- a. Electrical one-line diagram.
- b. Stamped Electrical System Analysis.
- c. Electrical room and all controls and remote instrumentation shall be located on the second floor of the building.
- d. A single transformer to be located on site with split distribution and protection such that roughly half the pumps could run with either distribution leg out for maintenance or repair. The transformer must be located on or above the second floor. All fire-protection requirements shall be met for transformer location.
- e. VFDs must have the ability to communicate with Ion Enterprise Power Monitoring Software.
- f. Powerlogics CM4000 Power Monitoring included for monitoring Electrical Service.
- g. All control systems must comply with and be incorporated into PWB's existing Supervisory Control and Data Acquisition (SCADA), networked to PWB's Interstate Operations Building on City's Integrated Regional Network Enterprise (IRNE) Fiber Cable for SEPAMS and CM4000.
- h. Process and Instrumentation Diagram (P&ID) in conjunction with PWB requirements.
- i. All interior and yard lighting, interior electric heating, ventilation, service outlets, control and telemetry wiring and hardware required.
- j. Generator connection ability such that a portable generator unit (not included) can be easily connected into the system as a backup power source.
- k. Training for PWB staff on all operation and maintenance for control systems.

7. Landscape Design

Design landscaping based on the Land Use Review and permit requirements which may include but not be limited to the following:

- a. Provide recommendations in limiting and mitigating construction and visual impacts to natural resources and incorporate recommendations into the design.
- b. Provide non-native vegetation removal and redevelopment with native species in the landscaping design.

8. Corrosion Control Design

Corrosion control design shall apply to all associated piping for the new pump station. Pipe materials and corrosion control design shall be per PWB Design Standards, and incorporated into the Plans and Specifications which will include PWB's Standard Specification and Plan details for dielectric isolation, coating, joint bonding, test stations, and anodes. PWB Design Standards as well as Standard Specification and Plan details for design of a corrosion control system shall be provided to the successful Proposer.

9. Operation and Maintenance (O&M) Manuals

Prepare manuals for operation and maintenance of the pump station in a format similar to that used by the Water Bureau at other Bureau facilities. A sample format of the manuals will be provided to the successful Proposer. The manuals shall include but not be limited to the following:

- a. A complete operating manual for the station including but not limited to:
 - as-built drawings,
 - all catalog cuts and schematics,
 - pump station operation procedures,
 - emergency operation procedures and contacts,
 - safety requirements.
- b. A complete maintenance manual for the station including but not limited to:
 - list and description of mechanical and electrical components
 - schematics,
 - maintenance procedures and schedules of facility and equipment including painting to address corrosion protection of facility components,
 - trouble shooting data,
 - overhaul procedures for the pumps, motors and other equipment installed
- c. All witness test data for pumps, VFDs and motors.

D. Public Involvement

The successful Proposer shall provide technical support for a PWB-led Public Involvement process in which the facade exterior of the pump station, landscaping improvements, and greenway improvements will be presented to the public for comment and selection for relevant options before the preliminary design phase is complete. Support services shall include but not be limited to the following:

1. Assist PWB Public Outreach staff during the public involvement process outlined in the Public Involvement Plan that was jointly prepared by Portland Parks and Recreation (PP&R) and PWB staff.
2. Attend up to 6 public meetings to address comments and questions regarding the project.
3. Provide graphics for meetings as requested by PWB Project Manager.

E. Permits

The successful Proposer shall provide the technical services necessary to prepare and submit complete applications for meetings and reviews with the City's Bureau of Development Services (BDS) and other permitting agencies which will include but not be limited to the following:

1. Gather information and data necessary to complete all required land use reviews and acquire building and other necessary permits. We expect the following approvals and permits to be required:
 - a. City of Portland zoning approvals:
 - i. Type III Conditional Use approval
 - ii. Type III Design Review (see Exhibit C Relevant Design and Greenway Review Requirements)
 - iii. Type III Zone Map Amendment
 - iv. Type II Greenway Review (see Exhibit C – Relevant Design and Greenway Review Requirements)
 - b. City of Portland Building Permit
 - c. City of Portland Street Opening Permit
 - d. Oregon Department of Environmental Quality (DEQ):
 - i. 1200-C Stormwater and Erosion Control permit
 - e. City of Portland Batch Discharge Permit (BES)
2. Prepare all required documentation and submittals for the necessary reviews and permits.
3. Attend Early Assistance and Pre-Application Meetings with the Portland Bureau of Development Services as required for the land use reviews and permitting process. Assume three (3) meetings.
4. Respond to requests for additional information or data from permitting and reviewing agencies as needed to acquire necessary approvals and permits.
5. Provide assistance during permitting and Land Use Review processes.

F. Assistance During Bidding

The successful Proposer shall provide technical assistance to PWB staff during the bidding process of Project. Support during bidding will include but not be limited to the following:

1. Attend the pre-bid conference and site visit, if and when requested by the CM.
2. Assist PWB in responding to clarifications of the construction contract documents and prepare addenda to bid documents as required. Respond to bidders questions and bid analysis if requested by CM.

G. Engineering Support During Construction

The successful Proposer shall designate one Engineer and support staff that are committed to this project to assist CM. Day-to-day project inspection, contract administration, payments, and the majority of construction engineering will be handled by the CM. The successful Proposer shall perform the following services during construction:

1. Attend the pre-construction conference(s).
2. Consult with PWB and act as its representative as provided in the general conditions of the contract documents.
3. Provide technical support as needed throughout the bidding process.
4. Make periodic visits to the site when requested by the CM to observe, as an experienced and qualified design professional, the progress and quality of the various aspects of the work. Based on information obtained during such visits, determine if work is proceeding in accordance with the contract documents. Provide a written response or report to the CM of observations and recommendations based on the site visits.

5. Perform inspection of the foundation subgrade as well as any special inspections required for structural issues as required by CM.
6. Assist CM in providing interpretations and clarifications of the contract documents and assist in preparation of Field Orders (FOs), Requests for Information (RFIs), and Change Orders (COs) upon request of the CM.
7. Provide complete list of submittals, warranties, samples and shop drawings that are required by the PWB's Construction Contractor.
8. Review shop drawings and submittals when requested and provide written responses to the CM as promptly as possible and within the contract turnaround time limits.
9. Witness test for VFD equipment, pumps and instrumentation Programmable Logic Controller (PLC) cabinet.
10. Review operating and maintenance instructions, schedules, certificates of inspection, tests and approvals; these are to be assembled in accordance with the contract documents and included with the O&M manuals prepared by the successful Proposer.
11. Participate in an inspection to determine if the work is substantially complete and assist the CM in preparing a list of items to be completed. Participate in the final inspection to determine if the completed work is acceptable for final payment. Give written notice to the CM that the work is acceptable or of any deficiencies that need to be resolved.
12. Be available as necessary for special consultation to resolve conflicts and provide interpretations.
13. Provide assistance in preparation of responses to construction claims.
14. Provide a set of reproducible as-built drawings on Mylar showing those changes made during the construction process based on data furnished by the PWB's Construction Contractor. As-builts will be provided electronically on CD-ROM or DVD in MicroStation format conforming to PWB standards and scans of original signed as-builts in PDF format. PWB CAD standards shall be provided to the successful Proposer. Revised specifications will be provided in Microsoft Word on CD-ROM or DVD.
15. Coordinate with the CM to verify that tests, equipment start-ups, and operating and maintenance training are conducted in the presence of appropriate personnel and that the PWB's Construction Contractor maintains adequate records of the proceedings. Evaluate the selected PWB's Construction Contractor's suggestions for modifications in the drawings and specifications and report them, with recommendations to the CM, when requested.
16. Provide construction close-out production of electronic as-builts that are developed by the PWB's Construction Contractor. Develop and assure compliance with the project punch list. Obtain all guarantees for PWB.

H. Startup & Testing Services

The successful Proposer shall provide required startup and testing services to ensure that the facility is fully operational and meets PWB's operating standards. The successful Proposer will coordinate with PWB staff to identify and develop operating standards for the Project. Services required will include:

1. Develop and implement a Commissioning Plan to ensure successful start-up of facility. The plan should, at a minimum, include the following:
 - a. Field Test Plan
 - b. Field Test Reports
 - c. Functional Acceptance Test Plans for all major components
 - d. Functional Acceptance Test reports and commentary
 - e. Process Narrative
 - f. Operational Readiness Test Plan
 - g. Operational Readiness Test Report
 - h. Revised Control Narrative

2. Provide support and guidance during all phases of start up, including field testing, operational readiness testing and functional acceptance tests.
3. Summarize the issues that emerged and their resolution in a Commissioning Memorandum/Report.

2. WORK PERFORMED BY THE CITY

The City has assigned a project manager to oversee the successful Proposer’s work and provide support as needed. Specific duties the City will perform and items it will provide to the Successful Proposer during the life of the project are listed below:

1. One copy of the City of Portland Standard Construction Specifications for reference during the development of the special specification.
2. One copy of the City of Portland Standard Bidding Instructions.
3. Electronic copy of Section 007200 – Supplemental General Requirements.
4. A MicroStation seed file containing standard construction drawings, legend (with symbols) and general notes in a DGN format. 3D seed file for MicroStation to be used for survey base map.
5. City of Portland, Purchasing required paperwork: Notice to Bidders, Notice to Contractors, Non-collusion Affidavit, Bid Bond, Proposal, Bid Forms, sample agreement with minority subcontractor, work force training and hiring program and Minority/Women/Emerging Small Business (MWESB) participation requirement information, prevailing wage rates. This shall be included and bound with the completed specifications.
6. Other City documents including applicable PWB Standard Drawings not included with this RFP deemed by PWB staff and successful Proposer as necessary for the design of the facility.
7. Written comments within fifteen (15) City business days of receipt of 30% design submittal.
8. Written comments within fifteen (15) City business days of receipt of 60% design submittal.
9. Written comments within fifteen (15) City business days of receipt of 90% design submittal.
10. Permit applications review and written comments within fifteen (15) working days after receipt of each item. PWB will submit pertinent permits and pay permit fees.
11. Survey to establish horizontal/vertical control and base mapping.
12. Bidability, Constructability, Operability, Environmental (BCOE) checklist form, as to inform the Consultant of the typical BCOE checks that the City will perform for project quality assurance.
13. Public outreach and education.
14. Overall Construction Management including oversight and inspection.

3. DELIVERABLES AND SCHEDULE

Deliverables shall be considered those tangible resulting work products that are to be delivered to the City such as reports, draft documents, data, interim findings, drawings, schematics, training, meeting presentations, final drawings and reports.

All deliverables and resulting work products from the contract awarded under this RFP will become the property of the City of Portland. The successful Proposer will be required to produce the following deliverables:

PROJECT MANAGEMENT

1. Attend a Project Kick-off Meeting with City Project staff and others to review all phases of the work.
2. Monthly summary reports highlighting work progress during the previous month and listing unresolved outstanding issues. One copy of each monthly report should be submitted to PWB’s Project Manager by the 15th of the next month. Progress reports shall be broken down by task and shall compare percentage complete with percentage of budget spent.

3. A Monthly Subconsultant Payment and Utilization Report by the 15th of each month (reference Part II, Section C, 5. Diversity in Employment and Contracting Requirements).
4. Copies of contracts with subconsultants.
5. Project Design Management Plan. Prepare a work plan that details the team approach to the project. The work plan should include specific tasks, a description of products, schedule, reviews, costs by task and discipline, and an explanation of how the team will interact.
6. Monthly Design Meetings as required to address relevant issues.
7. Monthly Construction Meetings as required.
8. Three (3) meetings with PWB Design and Operations staff to confirm system curves and pump selections
9. All required Public Involvement meetings as identified in Part I, Section B, 1. Technical or Required Services.
10. Agenda and minutes for all meetings that occur throughout the project including meetings with the public and open houses associated with the public involvement aspect of the project. The minutes are due within one week following the meeting.
11. A Monthly Payment Request (Invoices) due by the 15th of the following month and submitted to the PWB's Accounts Payable Department.

DESIGN

The successful Proposer is required to provide complete bid documents including all necessary permits to allow advertisement of the signed construction documents no later than **May 2012**. All construction documents shall be provided on a CD in Microsoft Word and PDF format with the electronic drawing files developed in Bentley 3D PlantSpace software and Bentley PlantSpace P&ID that conforms to PWB Computer Aided Drafting (CAD) standards. PWB CAD standards shall be provided to the successful Proposer. The number of hard copy submittals is noted below. CAD shall include electronic base files and all model data. The documentation supplied by PWB, such as Section 007200, shall be incorporated into the successful Proposer's signed construction documentation.

1. INITIAL DESIGN (30%) MILESTONE SUBMITTAL DOCUMENTS

This submittal package shall include one full size (22"x34") plan set fifteen (15) hard copies of 1/2 size (11"x17") plans along with fifteen (15) hard copies of remaining 30% submittal documents unless otherwise noted below:

a. Draft Geotechnical Report – ten (10) copies of the draft geotechnical report. The technical report is to include but not be limited to the following:

- Introduction and Project Understanding
- Scope of Services
- Site Description
- Conclusions
- Recommendations
- Subsurface Exploration data
- Site-specific Seismic evaluation
- Soil and Groundwater Contamination evaluation

b. 30% Plans shall include, at a minimum:

- Pump station building footprint
- Restroom facility location & footprint
- Storage footprint
- Site grading including topographical map
- In-station piping layout
- Valve vault location & footprint for suction and discharge lines
- Draft Equipment Selection

- Draft Equipment Schedule and Quantities
 - Draft P&ID
 - Electrical equipment layout
 - Electrical one-line diagram showing power distribution and protection from source power to all motors and main panels
 - Draft panel and MCC elevations
 - Transformer location & footprint
 - Instrumentation and control room layout
 - Suction and discharge piping
 - Valve connections for suction and discharge headers by existing pump station
 - Site security including temporary fencing
- c. **30% Specifications** shall include, at a minimum:
- Proposed list of specification sections
 - Draft sections of major project components
- d. **30% Construction Cost Estimates** shall include, at a minimum:
- Proposed list of Bid Items and Units of Measurements
 - Cost estimate for major components of the project
- e. **Permits**
- Permitting Memo detailing permitting requirements for the project, permitting agency, status for each permit, contact information, preliminary cost estimate for each permit, schedule for delivering the required permitting to meet the timeline for start of construction. The project schedule will include time allowed for PWB review.
 - Land Use Review documentation required for Early Assistance & Pre-application Conference with BDS
 - Attend a minimum of 3 meetings for Early Assistance & Pre-application conferences.
- f. **Public Involvement** submittals shall include:
- Architectural renderings of the pump station building with a minimum of three (3) options for external façade treatments. Architectural renderings will also include the following:
 - a minimum of 3 elevations views (north, south, east)
 - facility landscaping
 - plan views of building footprint
 - restroom facilities location and footprint
 - realignment of existing roadway in the park
 - Attend a minimum of 4 public meetings and 2 open houses
- g. **Draft Design Memorandum** shall include:
- Update proposed Design schedule
 - Identify potential project risks and develop a risk management plan that lists actions required to meet Start of Construction
 - Design assumptions and criteria, including a list of City's Green Building Policy requirements that will be incorporated into the design and construction of the project
 - Draft Hydraulics: System Curve and Pump Curves
 - Draft surge analysis results
 - Draft floodplain analysis results
 - Descriptions of issues and resolutions
 - Draft Statement of Operation
 - Draft written narrative control process strategy to be included as part of the O&M manual content.

- Draft memorandum evaluating the practicality of installing an eco-roof based on the factors identified in the specific scope. The memorandum should be between 2 to 5 pages in length.

h. Energy Trust Study shall include:

- Scoping Study
- Initiate Technical Analysis Study

2. PRELIMINARY LAND USE REVIEW MILESTONE SUBMITTAL DOCUMENTS

This submittal package shall be provided at the end of the Initial Design (30%) Milestone:

Permits

- Updated Permitting Memo including an updated schedule for delivering the required permitting to meet the timeline for start of construction. The project schedule will include time allowed for PWB review.
- Completed Application for LUR Review which shall include plans and narratives to support Type III Design Review, Type III Conditional Use Review, Type III Zone Amendment, and Type II Greenway Review. These submittals must incorporate comments and requirements from the Early Assistance Meetings and Pre-Application Conference.

3. INTERMEDIATE DESIGN (60%) MILESTONE SUBMITTAL DOCUMENTS

This submittal package shall include one (1) full size (22"x34") Plan set, fifteen (15) hard copies of ½ size (11"x17") plans along with fifteen (15) hard copies of remaining 60% submittal documents unless otherwise noted below.

a. Final Geotechnical Report – ten (10) copies of signed and stamped geotechnical report which will include:

- Update draft and incorporate all PWB comments
- Tabulated comments and responses to Preliminary Geotechnical Report

b. Energy Trust Study shall include:

- Technical Analysis Study Review
- Preliminary Specifications

c. 60% Plans shall include, at a minimum:

- Tabulated comments and responses to 30% Plans
- Revised plans incorporating changes from PWB staff comments on the 30% Plans and changes to design based on Land Use Review comments
- Final Site Plan
- Final Pump Station Building Layout
- Final On-site Pipe Alignment
- Draft In-Park Road Alignment
- Draft Design for Storm and Sewer Force Main & Lift Station
- Final Pipe Alignment for Supply and Discharge Lines
- Final one-line diagram
- Final P&ID
- All Motor Controller, MCC and non-PLC based control wiring schematics.
- Final Panel and MCC elevation drawings
- All Utilities Identified
- Elevations
- Sections and Details

- d. **60% Specifications** shall include, at a minimum:
 - Tabulated comments and responses to 30% Plans
 - Revised specifications incorporating changes from PWB staff comments on the 60% Plans and changes to the specifications based on Land Use Review comments
 - Completed Table of Contents
 - Completed Supplemental Conditions Sections
 - Draft of All Special Provisions Sections
 - Confirmed List of Specifications with Referenced Drawing Sheet

- e. **60% Construction Cost Estimates** shall include, at a minimum:
 - Proposed list of Bid Items and Units of Measurements
 - Cost estimate for major components of the project

- f. **Permits**
 - Updated Permitting Memo including an updated schedule for delivering the required permitting to meet the timeline for start of construction. The project schedule will include time allowed for PWB review
 - Incorporate changes to design based on land use review comments

- g. **Updated Design Memorandum** including:
 - Updated 30% memo submittal
 - Update to project schedule if necessary
 - Draft structural and civil calculations
 - Results and design recommendations of surge analysis
 - Results and design recommendations of floodplain analysis
 - Final Statement of Operations
 - Draft Electrical System Analysis using SKM PowerTools to include short-circuit coordination study, arc flash study and overcurrent device trip settings, stamped by a P.E.
 - Final Instrument Loop Diagrams and point-to-point interconnection wiring diagrams for all instrumentation circuits
 - Complete Input/Output (I/O) list of all analog and discrete instrumentation and control circuits. Includes equipment list, device setpoints and ranges. Assignment of I/O Tag numbering will be coordinated with PWB staff
 - Complete Electrical Circuit and Raceway schedule
 - Final written narrative control process strategy to be included as part of the O&M manual content
 - Final memorandum evaluating the practicality of installing an eco-roof based on the factors identified in the specific scope. The memorandum should be between 2 to 5 pages in length.

4. **PRE - FINAL DESIGN (90%) MILESTONE SUBMITTAL DOCUMENTS**

This submittal package shall include one full size (22"x34") plan set, fifteen (15) hard copies of ½ size (11"x17") plans along with fifteen (15) hard copies of remaining 90% submittal documents unless otherwise noted below.

- a. **90% Plans** – the revised plans shall be complete in all respects including all engineering details and be consistent with specifications. Changes resulting from PWB staff comments on the 60% Plans as well as changes to design based on Final Decision of the Land Use Review shall be incorporated. Provide tabulated comments and responses to 60% plan set.

- b. **90% Specifications** – the specifications will be complete and shall be consistent with design elements as shown on the drawings. Provide tabulated comments and responses to 60% specifications. Changes resulting from PWB staff comments on the 60% Specifications as well as changes to design based

on Final Decision of the Land Use Review shall be incorporated.

- c. **90% Construction Cost Estimates** – submit an update to bid item list for measurement and payment, and a final engineer's estimate for each bid item.
- d. **Permit** – provide all required Permit applications and approvals including any supporting documentation required for the permits. Update the permitting memo with status for each permit and an updated schedule. Identify delays and actions required/taken to meet the timeline for start of construction. Incorporate any final changes to design based on Final Decision of the Land Use Review.
- e. **Updated Design Memorandum** – Provide updated technical memo including a final version of the construction schedule through construction completion and facilities commissioning. Include a list of design modifications required by Land Use Review.
- f. **Energy Trust Study:**
 - Completed Incentive Form Agreement (Form 420)
 - Completed Oregon BETC ApplicationBoth forms can be found on the State of Oregon website: www.oregon.gov
- g. **BCOE Review** – Review and resolve BCOE comments submitted by the City.

5. 100% FINAL DESIGN MILESTONE SUBMITTAL DOCUMENTS

Provide three (3) hard copies of 100% submittals. Plans shall be to scale on ½ size (11" x17") sheets.

- a. **100% Plans** – the plans shall be complete in all respects including all engineering detail, be consistent with specifications, and incorporate the resolution of the BCOE review comments. Provide tabulated comments and responses to 90% plan set. Provide list of any outstanding design issues.
- b. **100% Specifications** – the specifications shall be complete in all respects, shall be consistent with design elements as shown on the drawings, and incorporate the resolution of the BCOE review comments. Provide tabulated comments and responses to 90% specifications.
- c. **100% Construction Cost Estimates** – provide Final Engineer's Estimate.
- d. **Permit** – provide completed Permit applications and approvals including any supporting documentation required for the permits. Resolutions to permitting issues should be resolved and all design requirements addressed.
- e. **Updated Design Memorandum** – submit any additional technical information as required or revision to the construction schedule as requested.

6. FINAL SIGNED DESIGN MILESTONE SUBMITTAL DOCUMENTS

Provide 1 original and full sized reproducible plan set, 1 unbound set of specifications and permitting documentation, and 1 electronic copy with all reference files for the following:

- a. **100% Plans** – Provide 1 signed, full sized original plan set and 1 electronic copy with all reference files.
- b. **100% Specifications, Attachments and Appendices** – Provide 1 signed, unbound, original with dividers and cover, and 1 electronic copy (Microsoft

Word and PDF format on CD).

c. Permits – Provide all required Building Permit applications including any supporting documentation required for the permits. Update the permitting memo with status for each permit and an updated schedule. Identify delays and actions required/taken to meet the timeline for start of construction.

d. Updated Design Memorandum – Provide final copies of all calculations.

BID PHASE

1. Provide original signed plans and specifications, estimates, calculations and supporting documents as well as an electronic copy with reference files to the CM.
2. Assist PWB in preparing addenda to bid documents as required.
3. Provide bid analysis if requested by CM.
4. Responses to Requests for Information (RFIs) and Addenda.

CONSTRUCTION PHASE

1. Provide a written response or report to the CM of observations and recommendations based on site visits.
2. Prepare field orders and change orders upon request of the CM.
3. Provide written responses to the CM regarding review of shop drawings and submittals when requested and as promptly as possible and within the contract turnaround time limits.
4. Maintain submittal log and provide PWB one complete copy of all submittals and responses at the completion of the project.
5. Prepare responses to construction claims.
6. Provide a set of reproducible as-built drawings on Mylar showing those changes made during the construction process (as-builts) based on data furnished by the PWB's Construction Contractor. As-builts shall also be provided electronically on CD-ROM or DVD in MicroStation that conforms to PWB CAD standard and scans of original signed as-builts PDF format. PWB CAD standards shall be provided to the successful Proposer. Revised specifications shall be provided in Microsoft Word on CD-ROM or DVD.
7. Provide written reports to the CM with appropriate details regarding factory and functional equipment test procedures and start-ups.
8. Compile and submit O&M manual with narrative of the O&M Plan. A draft copy shall be submitted for PWB review at the beginning of start-up & commissioning of the facility with the final draft provided prior to the final walk-through and inspection.
9. Provide Project Verification for Energy Trust Study including Form 440, which can be found on the State of Oregon website, www.oregon.gov.
10. Provide special inspections as required by permits to sign off as Engineer of Record.

4. PLACE OF PERFORMANCE

Contract performance will take place primarily at the Proposer's facility. On occasion and as appropriate, work will be performed at City facilities, a third-party location or any combination thereof.

5. PERIOD OF PERFORMANCE

The City anticipates having the successful Proposer begin work immediately upon contract execution with submittal of final deliverables to the City occurring by the end of **July 2014**.

Proposals containing earlier completion of the deliverables are acceptable and encouraged.

6. PUBLIC SAFETY

Public safety may require limiting access to public work sites, public facilities, and public offices, sometimes without advance notice. The Proposer shall anticipate delays in such

places and include the cost of delay in the proposed cost. The successful Proposer's employees and agents shall carry sufficient identification to show by whom they are employed and display it upon request to security personnel. City project managers have discretion to require the successful Proposer's employees and agents to be escorted to and from any public office, facility or work site if national or local security appears to require it.

7. INSURANCE

The successful Proposer(s) shall agree to maintain continuous, uninterrupted coverage of all insurance as required by the City. There shall be no cancellation, material change, reduction of limits or intent not to renew the insurance coverage(s) without a 30-day written notice, or ten (10) days written notice for non-payment from the successful Proposer or its insurer(s) to the City.

Workers' Compensation Insurance in compliance with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers (firms with one or more employees, unless exempt under ORS 656.027).

General Liability Insurance with a combined single limit of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage. It shall include contractual liability coverage for the indemnity provided under this contract, and shall provide that the City of Portland, and its agents, officers, and employees are Additional Insureds but only with respect to the successful Proposer's services to be provided under this Contract.

Automobile Liability Insurance with a combined single limit of not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage, including coverage for owned, hired, or non-owned vehicles, as applicable.

Professional Liability Insurance with a combined single limit of not less than \$1,000,000 per claim, incident, or occurrence. This is to cover damages caused by negligent acts, errors or omissions related to the professional services to be provided under this contract. If insurance coverage is provided on a "claims made" basis, the successful Proposer shall acquire a "tail" coverage or continue the same coverage for three years after completion of the contract, provided coverage is available and economically feasible. If such coverage is not available or economically feasible, contractor shall notify City immediately.

Certificates of Insurance: As evidence of the insurance coverages, the successful Proposer shall furnish acceptable insurance certificates to the City at the time signed contracts are returned to the City. The certificate will specify all of the parties who are Additional Insureds and will include the 30-day cancellation clause and 10-day non-payment clause as identified above. Insuring companies or entities are subject to City acceptance. If requested, complete policy copies shall be provided to the City. The successful Proposer shall be financially responsible for all pertinent deductibles, self-insured retentions, and/or self-insurance.

SECTION C

1. INDEX

ATTACHMENTS

Exhibit A	First Tier Subconsultant Disclosure Form (submit with proposal)
Exhibit B	Fulton Pump Station Replacement Work Plan (Page 9/9 intentionally excluded from this RFP)
Exhibit C	Relevant Design and Greenway Review Requirements
Exhibit D	Ordinance No. 183522
Exhibit E	Public Involvement Plan
Exhibit F	Survey of Willamette Park & SW Nevada Street
Exhibit G	Environmental Records Search for Fulton Pump Station Replacement

2. SAMPLE CONTRACT

The Professional, Technical and Expert Services Contract is the City's standard contract and will be used as a result of this selection process. A sample contract can be viewed at: <http://www.portlandonline.com/shared/cfm/image.cfm?id=27067> .

PART II

PROPOSAL PREPARATION AND SUBMITTAL

SECTION A

PRE-SUBMITTAL MEETING/CLARIFICATION

1. PRE-SUBMITTAL MEETING

There will be no pre-submittal meeting or site visit scheduled for this project.

2. RFP CLARIFICATION

Questions and requests for clarification regarding this Request for Proposal must be directed in writing, via email or fax, to the person listed below. **The deadline for submitting such questions/clarifications is Monday, March 29, 2010.** An addendum will be issued no later than 72 hours prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is in order.

Andrew Urdahl
City of Portland Water Bureau
1120 SW 5th Avenue, Room 600
Portland, Oregon 97204

E-mail: andrew.urdahl@ci.portland.or.us
Phone: (503) 823-7490
Fax: (503) 823-9407

SECTION B

PROPOSAL SUBMISSION

1. PROPOSALS DUE

Sealed proposals must be received no later than the date and time, and at the location, specified on the cover of this solicitation. The outside of the envelope shall plainly identify the subject of the proposal, the RFP number and the name and address of the Proposer. It is the Proposer's responsibility to ensure that proposals are received prior to the specified closing date and time, and at the location specified. Proposals received after the specified closing date and/or time shall not be considered and will be returned to the Proposer unopened. The City shall not be responsible for the proper identification and handling of any proposals submitted to an incorrect location.

2. PROPOSAL

Proposals must be clear, succinct and not exceed **30** pages. Cover letter, section dividers, title page, resumes, and table of contents do not count in the overall page count of the proposal. Proposers who submit more than the pages indicated may not have the additional pages of the proposal read or considered.

For purposes of review and in the interest of the City's Sustainable Paper Use Policy and sustainable business practices in general, the City encourages the use of submittal materials (i.e. paper, dividers, binders, brochures, etc.) that contain post-consumer recycled content and are readily recyclable. The City discourages the use of materials that cannot be readily recycled such as PVC (vinyl) binders, spiral bindings, and plastic or glossy covers or dividers. Alternative bindings such as reusable/recyclable binding posts, reusable binder clips or binder rings, and recyclable cardboard/paperboard binders are examples of preferable submittal materials. Proposers are encouraged to print/copy on both sides of a single sheet of paper wherever applicable; if sheets are printed on both sides, it is considered to be two pages. Color is acceptable, but content should not be lost by black-and-white printing or copying.

Supporting Information (as defined in this RFP under Part II, Section C.6), section dividers, title page and table of contents do not count in the overall page count of the proposal.

All submittals will be evaluated on the completeness and quality of the content. Only those Proposers providing complete information as required will be considered for evaluation.

The ability to follow these instructions demonstrates attention to detail.

3. ORGANIZATION OF PROPOSAL

Proposers must provide all information as requested in this Request for Proposal (RFP). Responses must follow the format outlined in this RFP. Additional materials in other formats, or pages beyond the stated page limit(s), may not be considered. The City may reject as non-responsive at its sole discretion any proposal or any part thereof, which is incomplete, inadequate in its response, or departs in any substantive way from the required format. Proposal responses shall be organized in the following manner:

1. Cover Letter
2. Project Team & Proposer's Capabilities
3. Project Approach and Understanding
4. Diversity in Employment and Contracting Requirements
5. Proposed Cost
6. Supporting Information
7. A completed First Tier Disclosure Form (refer to Part II.C.5)

SECTION C

EVALUATION CRITERIA

1. COVER LETTER

By submitting a response, the Proposer is accepting the General Instructions and Conditions of this Request for Proposal (reference second page of the RFP) and the Standard Contract Provisions of the Professional, Technical and Expert Services contract.

The Cover Letter **must** include the following:

- RFP number and project title
- name(s) of the person(s) authorized to represent the Proposer in any negotiations
- name(s) of the person(s) authorized to sign any contract that may result
- contact person's name, mailing or street addresses, phone and fax numbers and email addresses

A legal representative of the Proposer, authorized to bind the Proposer in contractual matters must sign the Cover Letter.

BUSINESS COMPLIANCE

The successful Proposer(s) must be in compliance with the laws regarding conducting business in the City of Portland before an award may be made. The Proposer shall be responsible for the following:

Certification as an EEO Affirmative Action Employer

The successful Proposer(s) must be certified as Equal Employment Opportunity Employers as prescribed by Chapter 3.100 of the Code of the City of Portland prior to contract award. Details of certification requirements are available from Procurement Services, 1120 SW Fifth Avenue, Room 750, Portland, Oregon 97204, (503) 823-6855, website: <http://www.portlandonline.com/omf/purchasing>

Non-Discrimination in Employee Benefits (Equal Benefits)

Proposers are encouraged to submit the Equal Benefits Compliance Worksheet/Declaration Form with their response. If not submitted, you will be contacted and required to provide this form prior to contract award; otherwise your proposal may be rejected. If your company does not comply with Equal Benefits and does not intend to do so, you must still submit the Form. The Equal Benefits Compliance Worksheet/Declaration Form can be obtained from the following web site: <http://www.portlandonline.com/omf/purchasing>

- Fill out the form properly. You may call Procurement Services at 503-823-6855 to ensure you correctly complete the form. You may also call the contact listed on the front page of this solicitation document for assistance.

- There are five options on the Worksheet/Declaration Form ranging from full compliance (Options A, B, C), to one that requires advance authorization by the City (Option D – Delayed Compliance), to Non Compliance. Select the option that is true of your company's standing at the time you submit your proposal. You cannot change your answer after you submit the Worksheet/Declaration Form.
- Option D is only used if you have an official waiver from the City. Waivers are only issued by Procurement Services.
- The Form provides the City with your declared Equal Benefit status. However, the City issues the final determination of your Equal Benefit status for purposes of contract award.

If information on your form is conflicting or not clearly supported by the documentation that the City receives, the City may seek clarification to ensure we properly classify your compliance.

Business License

The successful Proposer(s) must be in compliance with the City of Portland Business License requirements as prescribed by Chapter 7.02 of the Code of the City of Portland prior to contract award. Details of compliance requirements are available from the Revenue Bureau License and Tax Division, 111 SW Columbia Street, Suite 600, Portland, Oregon 97201, (503) 823-5157, website: <http://www.portlandonline.com/omf/index.cfm?c=29320>

If your firm currently has a business license and is EEO certified, include in the Cover Letter your firm's City of Portland Business License number as well as the Equal Employment Opportunity (EEO) expiration date.

2. PROJECT TEAM AND PROPOSER'S CAPABILITIES

This section will provide a basis for judging how well the Project Team's qualifications, experience, and time allocation relate to the Project. The information provided herein should refer to the Project Principal(s), Project Manager(s), Key Staff and Sub-Consultants, if applicable. This section should describe:

1. Approximate number of people to be assigned to the project.
2. Team/Firm qualifications and experience on similar or related projects:
 - a. Technical qualifications and relevant experience of prime consultant.
 - b. Technical qualifications and relevant experience of sub-consultant, if any
 - c. Project manager's experience with similar projects and ability to monitor and maintain project scope, schedule and budget
3. Names of key members who will be performing the work on this project, and:
 - a. Responsibilities on this project.
 - b. Experience and role for similar projects or work tasks described in the scope of work.
 - c. Unique qualifications and abilities.
 - d. Percentage of their time that will be devoted to the project.
 - e. Resumes of key staff, for both prime consultants and sub-consultants.
5. Describe similar large-capacity pump station projects performed within the last 3 to 5 years, which best characterize Proposer's capabilities, work quality and cost control in relation to scope of work.
6. Describe similar projects with other government agencies.
7. Describe Proposer's resources available to perform the work for the duration of the project and other on-going projects.
8. Describe Proposer's internal procedures and/or policies associated or related to work quality and cost control.
9. Describe Proposer's management and organizational capabilities.
10. Describe Proposer's experience and expertise with land use reviews, and permits.

The successful Proposer shall be required to maintain records associated with all background checks and suitability determinations of their employees or sub-contracted laboratories that perform for this project. PWB reserves the right to inspect these records at any time.

3. PROJECT APPROACH AND UNDERSTANDING

This section should describe Proposer's approach and understanding to perform the work requirements described in Part I, Section B, 1. Technical or Required Services of this RFP. At a minimum, include the following:

1. Describe the proposed work tasks and activities, the methodology that will be used to accomplish them, and identify the team members who will work on each task.
2. Describe the proposed work products that will result from each task or activity.
3. Identify points of input and review with City staff.
4. Identify the time frame estimated to complete each task.

4. DIVERSITY IN EMPLOYMENT AND CONTRACTING REQUIREMENTS

The City is committed to increasing contracting opportunities for State of Oregon certified minority, women and emerging small business (M/W/ESB) enterprises. The City values, supports and nurtures diversity, and encourages any firm contracting with the City to do the same, maximizing M/W/ESB business participation with regard to all City contracts. As such, the City has established an overall 20% utilization goal in awarding PTE contracts to State of Oregon certified emerging small business (ESB) enterprises. The City has assigned at least 15% of the total points available on this solicitation to determine the award of this contract. No goal is set for the use of minority (MBE) and women business (WBE) enterprises, but the City is committed to ensuring that such firms receive opportunities and equal consideration to be awarded City PTE contracts.

All Proposers shall address the following in their proposals:

- a. Indicate if your firm is currently certified in the State of Oregon as an MBE, WBE and/or ESB, or if your firm has applied for certification with the State of Oregon's Office of Minority, Women and Emerging Small Business (OMWESB). Provide a copy of the State of Oregon certification letter confirming receipt of application or copy of the approval letter certifying your firm.
- b. Identify your current diversity of workforce and describe your firm's commitments to providing equal employment opportunities. Include in your response:
 - Number of total employees and description of type of work performed.
 - Number of minorities and women within your current workforce, broken out by ethnicity and positions held.
 - Any underutilization of minorities or women within your workforce and your firm's efforts to remedy such underutilization.
 - Any plans to provide innovative mentoring, technical training or professional development opportunities to minorities and women in your workforce in relation to this project, or plans to employ minorities and women to work on this project.
 - Description of the process your firm uses to recruit minorities and women.
- c. Have you subcontracted or partnered with State of Oregon certified M/W/ESB firms on any project within the last 12 months? If so, please describe the history of the firm's subcontracting and partnering with certified M/W/ESB firms. Include in your response:
 - List of State of Oregon certified M/W/ESB firms with which your firm has had a contractual relationship during the last 12 months.
 - Any innovative or successful measures that your firm has undertaken to work with M/W/ESB firms on previous projects.
 - Any mentoring, technical or other business development services your firm has provided to previous or current M/W/ESB subconsultants or partners, or will provide in relation to this project.

- d. Are you subcontracting any element of your proposal? Describe your firm's plan for obtaining maximum utilization of State of Oregon certified M/W/ESB firms on this project. Include in your response:
- Subcontracting opportunities your firm has identified in the scope of this project.
 - Efforts made relating to outreach and recruitment of certified M/W/ESB firms. Did your firm advertise contracting opportunities in the *Daily Journal of Commerce*, *Skanner*, *Oregonian*, *Observer*, *El Hispanic News*, *Asian Reporter*, and/or other trade publications? Did your firm conduct any outreach meetings? Did your firm use the State's OMWESB certification list, or other source, as a basis for direct outreach? What were the actual results of any of the above efforts?
 - Any proposals received from certified M/W/ESB firms. If any such proposals were rejected, provide reasons for rejection.
 - Other efforts your firm used or proposes to use in relation to this project.
- e. If your firm will be utilizing State of Oregon certified M/W/ESB firms on this project, please list those firms and detail their role within your proposal. In addition, **all Proposers must submit Exhibit A - First Tier Subconsultant Disclosure Form 1** in their proposal, which requires Proposers to identify the following:
- The names of **all** subconsultants to be used on this project with subcontracts greater than or equal to \$10,000.
 - The names of all State of Oregon certified MBE, WBE and ESB firms. If firms have more than one certification (i.e., ESB and MBE, and/or ESB and WBE) note that on the form so that proper credit can be given for the ESB goal and for tracking MBE and WBE utilization.
 - The proposed scope or category of work for each subconsultant.
- If Proposers will not be using any subconsultants that are subject to the above disclosure requirements, Proposers are required to indicate "**NONE**" on the First Tier Subconsultant Disclosure Form 1.

The City expects thoughtful consideration of all of the above Diversity in Employment and Contracting criteria in the preparation of proposals. The City will enforce all diversity in workforce and M/W/ESB commitments submitted by the successful Proposer, and the successful Proposer will be required to submit a completed Monthly Subconsultant Payment and Utilization Report to ensure that subconsultants are utilized to the extent originally proposed and submitted in its proposal. The successful Proposer will not be permitted at any time to substitute or add a subconsultant without the prior written approval of the Chief Procurement Officer. ALL subconsultants, including M/W/ESB firms, and first tier subconsultants shall be reported on the Monthly Subconsultant Payment and Utilization Report as well as contract amounts and payments. For reference, a copy of this form may be obtained at: <http://www.portlandonline.com/shared/cfm/image.cfm?id=119851> .

5. PROPOSED COST

The proposal shall include the Proposer's true estimated cost for the proposed project approach irrespective of the City's anticipated cost. Additionally, this cost shall include the hourly rates of each person associated with the project as well as the estimated number of hours each staff member will be expected to work on each task.

FEES AND CHARGES

For major tasks, the proposal should identify staff assignments, including the estimated number of hours of each individual and their proposed hourly billing rate, in a cost table. Estimates of other reimbursable costs not associated with hourly based fees, and the assumptions used (e.g., unit costs) should also be included in the table. For all tasks, the proposal should present not-to-exceed estimates. The main points with regard to budget management in City consulting contracts are:

1. The overall contract/project budget may not be changed or exceeded without prior written City/Bureau and successful Proposer approval.

2. Individual project task budget limits may be changed only with Bureau project manager's written approval, typically when requested in advance by the successful Proposer.
3. It is the Water Bureau's preference that the fees for preliminary design, design, and construction services are identified separately.

HOURLY RATE MULTIPLIER

For Water Bureau projects, the multiplier to be applied to the Proposer's direct labor costs shall be limited to 3.1. This multiplier is meant to include fringe benefits, payroll bonuses, autos, telecommunications, facsimile services, overhead expenses including but not limited to local and long distance telephone, parking, delivery/courier, general business and professional liability insurance, advertising costs, postage, leasing of office equipment, travel costs within a 50 mile radius of the city of Portland, information technology (including computer time and CAD services and other related highly specialized equipment), all other direct costs not identified as reimbursable, other indirect costs (support staff such as legal, accounting, officers, computer) and profits.

REIMBURSABLES

The following are reimbursable to the successful Proposer at their cost (i.e., without mark-up): actual labor cost of personnel working directly on the project, travel beyond a 50 mile radius of Portland when specifically required by the contract (which may also specify limits on travel costs and per diem charges), document reproduction costs in excess of the number required as part of the contract, mileage costs directly attributable to the project, and approved reimbursable direct costs.

Sub-consultant costs are reimbursable at cost plus a maximum of 5% (sub consultant contracts must also carry the same conditions as the primary PTE contract regarding the limitations outlined in this and other sections).

PAYMENT

Compensation will be based on invoices and detailed monthly progress reports submitted to the City, which will document completion of project tasks and provide detailed documentation of project activity by project staff. Compensation rates may be changed, at the discretion of the City via an amendment to the contract process, a maximum of once per year following initial contract execution and these changes will be negotiated based on a standard cost-of-living adjustment to salaries that do not affect the total contract cost. The adjustment shall be limited to the inflation rate as reported by the US Department of Labor, Bureau of Labor Statistics and certified by the Auditor of the City of Portland.

6. SUPPORTING INFORMATION

Supporting material must include a minimum of **three (3)** references, and may include other information pertinent to the project or work to be performed. References must include the contact person's name, agency, address, phone number, their role in the project (e.g., project manager, etc.), name of the project and when the work was done.

PART III

PROPOSAL EVALUATION

SECTION A

PROPOSAL REVIEW AND SELECTION

1. EVALUATION CRITERIA SCORING

Each proposal shall be evaluated on the following evaluation criteria, weighting and maximum points, as follows:

	Criteria	Maximum Score
a.	Cover Letter	0
b.	Project Team & Proposer's Capabilities	40
c.	Project Approach and Understanding	30
d.	Diversity in Employment and Contracting	20
e.	Proposed Cost	10
f.	Supporting Information	0
	Total Points Available	100

2. PROPOSAL REVIEW

An evaluation review committee will be appointed to evaluate the proposals received. For the purpose of scoring proposals each of the committee members will evaluate each proposal in accordance with the criteria and point factors listed above. The evaluation committee may seek outside expertise, including but not limited to input from technical advisors, to assist in the evaluation process.

The successful Proposer shall be selected by the following process:

- a. An evaluation committee will be appointed to evaluate submitted written proposals.
- b. The committee will score the written proposals based on the information submitted according to the evaluation criteria and point factors.
- c. The committee will require a minimum of **10** working days to evaluate and score the written proposals.
- d. A short list of Proposers, based on the highest scores, may be selected for oral interviews if deemed necessary. The City reserves the right to increase or decrease the number of Proposers on the short list depending on the scoring and whether the Proposers have a reasonable chance of being awarded a contract.
- e. If oral interviews are determined to be necessary, the scores from the written proposals will be considered preliminary. Final scores, based on the same evaluation criteria, will be determined following the interviews.

All communications shall be through the contact(s) referenced in Part II, Section A.2 of the RFP. At the City's sole discretion, communications with members of the evaluation committee, other City staff or elected City officials for the purpose of unfairly influencing the outcome of this RFP may be cause for the Proposer's proposal to be rejected and disqualified from further consideration.

For contracts over \$100,000, the evaluation committee's recommendation for contract award will be submitted to the Portland City Council for approval. The City has the right to reject any or all proposals for good cause, in the public interest.

NOTE: In the City's discretion, litigation between the City and a Proposer shall be cause for proposal rejection, regardless of when that litigation comes to the City's attention and regardless how the Proposer's proposal may have been scored. Proposals may also be rejected if they use subcontractors or subconsultants who are involved in litigation with the City. Proposers concerned about possible rejection on this basis should contact the City before submission of a proposal for a preliminary determination of whether its proposal will be rejected.

3. CLARIFYING PROPOSAL DURING EVALUATION

During the evaluation process, the City has the right to require any clarification or change it needs in order to understand the Proposer's view and approach to the project and scope of the work. While clarification is being requested, no other changes or substitutions will be allowed to proposals.

SECTION B

CONTRACT AWARD

1. CONSULTANT SELECTION

The City will negotiate and, if successful, award a contract to the highest scoring Proposer. Should the City not reach a favorable agreement with the highest scoring Proposer, at the City's sole discretion, the City shall terminate negotiations and commence negotiations with the second highest scoring Proposer and so on until a favorable agreement is reached. A consultant selection process will be carried out under Portland City Code Chapter 5.68.

2. CONTRACT DEVELOPMENT

The proposal and all responses provided by the successful Proposer may become a part of the final contract. The form of contract shall be the City's Contract for PTE Services.

3. AWARD REVIEW AND PROTESTS

REVIEW:

Following the Notice of Intent to Award, the public may view proposal documents. However, any proprietary information so designated by the Proposer as a trade secret or confidential and meeting the requirements of ORS 192.501, 192.502 and/or ORS 646.461 et seq., will not be disclosed unless the Multnomah County District Attorney determines that disclosure is required. At this time, Proposers not awarded the contract may seek additional clarification or debriefing, request time to review the selection procedures or discuss the scoring methods utilized by the evaluation committee.

PROTESTS OF CONTRACT AWARDS:

Protests may be submitted to the Chief Procurement Officer only for contracts in excess of the formal limit established by the City Auditor (reference <http://www.portlandonline.com/omf/index.cfm?a=74585&c=27353>), and only from those Proposers who would receive the contract if their protest were successful.

Protests must be received by the Chief Procurement Officer within seven (7) calendar days UNLESS OTHERWISE NOTED IN THE SOLICITATION DOCUMENT following the date the City's Notice of Intent to Award was issued. The protest must specifically state the reason for the protest and show how its proposal or the winning proposal was mis-scored or show how the selection process deviated from that described in the solicitation document. No contract will be awarded until the protest has been resolved.

Timely protests must include all legal and factual information regarding the protest, and a statement of the form of relief requested. Protests received later than specified or from other than the Proposer who would receive the contract if the protest was successful will not be considered. The exercise of judgment used by the evaluators in scoring the written proposals and interviews, including the use of outside expertise, is not grounds for appeal.

The Chief Procurement Officer may waive any procedural irregularities that had no material affect on the selection of the proposed contractor, invalidate the proposed award, amend the award decision, request the evaluation committee re-evaluate any proposal or require the bureau to cancel the solicitation and begin again to solicit new proposals. In the event the matter is returned to the evaluation committee, the Chief Procurement Officer shall issue a notice canceling the Notice of Intent to Award.

Decisions of the Chief Procurement Officer are final and conclude the administrative appeals process.

EXHIBIT A

CITY OF PORTLAND PROFESSIONAL TECHNICAL & EXPERT (PTE) SERVICES FIRST TIER SUBCONSULTANT DISCLOSURE FORM

CITY PTE DISCLOSURE REQUIREMENTS

The City's disclosure program was adopted to document the use of subconsultants on City projects over \$100,000; particularly Oregon certified Minority, Women and Emerging Small Businesses (M/W/ESBs).

This Request for Proposal requires submission by the Proposer of the First Tier Subconsultant Disclosure Form. When the contract amount of a first-tier subconsultant furnishing services, labor or labor and materials would be greater than or equal to \$10,000, the Proposer must disclose the following information about such subconsultants:

- 1) The subconsultant's contact information
- 2) State of Oregon M/W/ESB designation
(*Verify certification status with the Office of Minority, Women and Emerging Small Business at <http://egov.oregon.gov/DCBS/OMWESB/index.shtml>*)
- 3) The proposed scope or category of work that the subconsultant will be performing
- 4) The amount of the subconsultant's contract

If the Proposer will not be using any subconsultants that are subject to the above disclosure requirements, the Proposer is required to indicate "**NONE**" on the accompanying form.

ATTACHMENTS: Form 1: City of Portland PTE First Tier Subconsultant Disclosure Form

**CITY OF PORTLAND
PTE FIRST TIER SUBCONSULTANT DISCLOSURE FORM
(FORM 1)**

This Request for Proposal requires submission by the Proposer of the First Tier Subconsultant Disclosure Form. When the contract amount of a first tier subconsultant furnishing services, labor or labor and materials would be greater than or equal to \$10,000, the Proposer must disclose the following information about that subconsultant.

Proposer Name: _____

Proposed Cost: _____

RFP Number: _____

Project Name: _____

SUBCONSULTANT INFORMATION (Please Print)	M/W/ESB	SCOPE/TYPE OF WORK	SUBCONTRACT AMOUNT
Firm Name: Phone #: Fax #:			\$
Firm Name: Phone #: Fax #:			\$
Firm Name: Phone #: Fax #:			\$
Firm Name: Phone #: Fax #:			\$
Firm Name: Phone #: Fax #:			\$
Firm Name: Phone #: Fax #:			\$

NOTE:

- 1) If the Proposer will not be using any subconsultants that are subject to the above disclosure requirements, the Proposer is required to indicate "NONE" on this form.
- 2) All subconsultants with contracts \$10,000 or over must be listed on this form. Leave M/W/ESB column blank if firm is not confirmed certified through the *State of Oregon Office of Minority, Women and Emerging Small Business*: <http://egov.oregon.gov/DCBS/OMWESB/index.shtml>.