



# **REQUEST FOR PROPOSAL (RFP)**

**RFP # 21-0028**

## **HVAC -Mechanical Contractor Master Contracts**

RFP Closing (Due Date & Time):  
**May 5, 2022 at 2:00 PM Pacific Time**

Issued by:  
**Beaverton School District 48J  
16550 SW Merlo Road  
Beaverton Oregon 97003  
April 5, 2022**

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**REQUEST FOR PROPOSALS**

**Public Improvement**

Solicitation No: RFP 21-0028

**Summary**

The purpose of this Solicitation is to establish HVAC -Mechanical Contractor- Master contracts for the provision of Architectural/Engineering Services for the next six (6) years.

**A MANDATORY pre-proposal conference will be held April 13, 2022 at 11:30 AM Pacific Time on Zoom:**

Join Zoom Meeting

<https://beavertonk12.zoom.us/j/8426283021?pwd=QlJJOEwxeUI5SXFhRVRTTFBwTnhxdz09>

Meeting ID: 842 628 3021

Passcode: 1QVYxc

One tap mobile

+12532158782,,8426283021#,,,,\*618377# US (Tacoma)

Dial by your location

+1 253 215 8782 US (Tacoma)

Meeting ID: 842 628 3021

Passcode: 618377

Find your local number: <https://beavertonk12.zoom.us/j/8426283021?pwd=QlJJOEwxeUI5SXFhRVRTTFBwTnhxdz09>

Interested Firms must submit Proposals and current rate sheets as a separate document pursuant to the provisions of this RFP **via email to: [Contracts@beaverton.k12.or.us](mailto:Contracts@beaverton.k12.or.us), PRIOR** to the Closing:

**PROPOSAL DUE DATE & TIME (CLOSING): May 5, 2022 at 2:00 PM Pacific Time  
LATE SUBMISSIONS WILL NOT BE ACCEPTED**

Timely received Proposals will be opened, recorded, and prepared for evaluation. The District will not read Proposals aloud. The number of firms submitting a Proposal and their identities will be available within seven days. The contents of any Submission will not be disclosed to the public until all Proposals have been evaluated and a Notice of Intent to Award (NOI) has been issued.

**Proposers are solely responsible for ensuring that the Beaverton School District receives its Proposal.**

Firms must familiarize themselves with the entire RFP document.

All questions and comments regarding this Solicitation must be directed ONLY IN WRITING by e-mail to: [contracts@beaverton.k12.or.us](mailto:contracts@beaverton.k12.or.us).

**THE DISTRICT MAY REJECT ANY SUBMISSION  
NOT IN COMPLIANCE WITH ALL PRESCRIBED REQUIREMENTS.**

SECTION I – INTRODUCTION

Solicitation No: RFP 21-0028

1. **PROJECT OVERVIEW:**

The purpose of this solicitation is to obtain qualified Mechanical Contractors to enter into Master Contracts with Beaverton School District (BSD). The contracts will be effective July 1, 2022 provided the BSD 2022 Capital Improvement Bond is approved by voters in May 2022. The contracts are expected to have a maximum 10 -year life, with annual renewals starting in July 2023. BSD may choose to partner with the selected firms for some projects remaining from the 2014 Bond or select non-bond funded projects.

2. **PROJECT CONSIDERATIONS:**

In this initial Request for Proposal (RFP), proposers are requested to provide their qualifications as outlined below.

3. **SOLICITATION AND SELECTION PROCESS SCHEDULE:**

**Process Milestones**

Issue RFP  
Pre-Proposal Conference  
Deadline for Questions  
Issue final Addendum (if needed)  
Submit Proposals  
Interviews  
Notice of Intent to Award  
Award Contract

**Dates**

April 5, 2022  
April 13, 2022  
April 27, 2022  
April 29, 2022  
May 5, 2022 by 2:00 p.m.  
Week of May23, 2022  
on or about June 1, 2022  
June TBD

## SECTION II – STATEMENT OF WORK

Solicitation No: RFP 21-0028

### 1. PURPOSE AND INTRODUCTION:

The purpose of this solicitation is to obtain qualified Mechanical Contractors to enter into Master Contracts with Beaverton School District (BSD). The contracts will be effective July 1, 2022 and are expected to have a maximum 10 year life with annual renewals starting in July 2023. The Master Contracts will include a wide variety of mechanical maintenance and equipment or component replacements including any related design, trouble-shooting, and permitting services that will be required to complete projects as identified in the specific scope of work for the Project Work Authorization (PWA). The Contractor must coordinate with District Staff and any other Consultants that the District may separately procure to assist with the specific Projects.

In this initial Request for Proposal (RFP), proposers are requested to provide their qualifications as outlined below. It is the intent of the District to award up to 5 Master Contracts.

### 2. SERVICES PROVIDED:

#### a. Preventative Maintenance

- i. At a pre-planned time, the contractor shall provide onsite inspection, testing, and troubleshooting of HVAC equipment. This may result in calibration, adjustments, or component replacements to ensure the equipment is in proper working order consistent with original manufacturer specifications and recommendations.
- ii. District Maintenance staff may identify repairs needed and request the contractor complete repairs as they may be beyond the District's current capacity. The District may also procure equipment and request the contractor install, adjust, and ensure equipment is in proper working order consistent with original manufacturer specifications and recommendations.

#### b. Equipment Replacement

- i. Contractor shall procure, deliver, and install equipment to replace existing equipment that is either beyond the end of its usable life, or has ceased functioning in an efficient manner and is not repairable.
- ii. New equipment is subject to submittal review by the District and any consultants they deem necessary.
- iii. Contractor shall provide all trucking, hoisting equipment, electrical, gas, and low-voltage connections, curb adapter, or new curb(including structural review for units over 400 pounds) for the new equipment.
- iv. Contractor shall dispose of all removed equipment and related debris.
- v. Contractor shall coordinate with the roofing contractor to maintain the existing roofing warranty, if any exists. If a warranty doesn't exist, the contractor shall provide a weather tight patch and provide a 2-year workmanship warranty.
- vi. Contractor shall provide all required permitting for equipment replacement, including but not limited to mechanical, electrical, and structural permits.
- vii. Prior to ordering of equipment, the contractor shall confirm with the AHJ what the screening requirements are, if any.

#### c. Emergency Repairs

- i. Emergency repairs are on-site, un-scheduled maintenance and/or repair of HVAC equipment which is not operating properly and requires immediate repair or services to keep it in proper working order consistent with original manufacturer specifications and recommendations

#### d. Controls Work

## SECTION II – STATEMENT OF WORK

Solicitation No: RFP 21-0028

- i. The contractor shall be able to engage a qualified Johnson Controls contractor to assist in the Work as needed or specified.
- ii. The district utilizes Johnson Controls' MetasysBACnet for its direct digital control (DDC) protocol. Acceptable contractors are NorthWest Controls Contractors, Automated Controls (Albireo Energy) or Johnson Controls Inc.

### 3. GENERAL REQUIREMENTS:

The District is seeking the services of Mechanical Contractors, resulting in a roster of qualified professionals to perform individual PWA's on an as needed basis.

- a. The selected Contractor(s) shall provide all labor, materials, equipment, transportation, licenses/certifications, insurances, expertise, technology, permits, and services as necessary and/or required to execute all of the Work.
- b. The PWA may require the contractor to secure the services of second tier subcontractors including but not limited to electricians, controls contractors, structural engineers or other subcontractors to complete the work as indicated.
- c. Consultants shall coordinate with all applicable Authorities Having Jurisdiction (AHJ) including but not limited to the City of Beaverton, Washington County, Clean Water Services, or Tualatin Valley Fire & Rescue to confirm and comply with requirements.
- d. As required by PWA's, the contractor shall prepare and submit required documentation to obtain required permits. Contractor is responsible to pay for all trade permits.
- e. Projects shall implement the following attributes:
  - i. The facilities must be implemented with significant consideration being given to ease of maintenance and effective maintenance cost management.
  - ii. Efficient utility systems using proven technologies.
  - iii. High degree of centralized control of lighting and environmental controls to allow managing these systems from a base operational schedule with easy temporary central override to account for proper safety and efficient energy management during special events and/or community use.
  - iv. Energy features in partnership with Energy Trust of Oregon and the Oregon Department of Energy.
  - v. All designs shall be in compliance with all applicable Building Code requirements.
  - vi. Beaverton School District Technical Standards located at: <https://www.beaverton.k12.or.us/departments/facilities-development/technical-standards>
- f. Miscellaneous
  - i. All persons involved in the project who will have a physical presence on site at any time during the course of the project will need to clear a background check. The basic criteria of clearance and refusal offenses will be provided by the District Project Representative. Contractors and sub-contractors shall provide a report of who has cleared the background check by an approved agency. The District background check requirements are attached for reference.

### 4. PROJECT PROCEDURES:

- a. **Quote:** A proposal including pricing will be requested from at least one of the qualified contractors for each individual project as the projects occur. Project proposals for specific work will be based on a specific scope of work. The district reserves the right to select from all the qualified contractors the best fit for the specific project irrespective of proposal pricing.

## SECTION II – STATEMENT OF WORK

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- i. The District Representative will provide a project scope of work to the Contractor(s).
  - ii. Prior to submission of the proposal the contractor(s) may request a site visit.
  - iii. Contractor shall submit a proposal as requested to include pricing utilizing the current labor rates in their Master Contract.
  - iv. Proposals may require subcontractors and/or materials to complete the work as outlined in the project scope of work. Mark-ups on subcontractor prices will be controlled by the governing contract.
  - v. After the proposal has been submitted the District representative may request a virtual, in-person or phone interview to gather additional information about the proposal.
- b. Issuance of the PWA**
- i. Once the District agrees to a proposal, a PWA will be issued and work may commence.
- c. Annual Renewal of the Master Contract**
- i. Annually, the District may elect to renew the Master Contracts. Price adjustments may occur at this time and must be agreed to in writing by both the Contractor and the District, and shall be added to the contract document by Contract Amendment.

## SECTION III – INSTRUCTIONS TO PROPOSERS

Solicitation No: RFP 21-0028

### 1. GENERAL:

The District intends to procure the Services described herein using the Formal Selection Procedure pursuant to OAR 137-048-0220.

### 2. PRE-PROPOSAL CONFERENCE:

- a. Purpose. The pre-proposal conference is conducted with potential Proposers present to explain and discuss the Solicitation requirements.
- b. Required Attendance. If the District pre-proposal conference is mandatory (as indicated on the Summary Page), a proposal submitted by a Proposer who did not attend the mandatory pre-proposal conference will be rejected.
- c. Statements Not Binding. Statements made by the District's representative at the pre-proposal conference do not change the Solicitation Document unless the District confirms such statements with a written Addendum.

### 3. ADDENDA:

- a. **Issuance; Receipt.** The District may change this Solicitation only by Written Addenda. A Firm shall provide written acknowledgement of receipt of all issued Addenda with their submission on the Proposer Certification (ATTACHMENT A).
- b. **Notice and Distribution.** The District will publish notice of any and all Addenda on the Oregon Buys website ([oregonbuys.gov](http://oregonbuys.gov)). Addenda may be downloaded from the Oregon Buys website. It is the Applicants responsibility to inquire about Addenda.

### 4. REQUEST FOR CLARIFICATION:

- a. **Clarification.** Prior to the deadline for submitting a written proposal, an Applicant may request that the District clarify any provision of the solicitation document. The District's clarification to an Applicant, whether orally or in writing, does not change the solicitation and is not binding on the District unless the District amends the solicitation by Addendum.
- b. **Extension of Closing.** If the District receives a written request for clarification from an Applicant, the District may extend Closing if the District determines an extension is necessary to consider the request and issue an Addendum to the Solicitation.

### 5. SUBMISSION:

- a. **Applicant's Acknowledgement.** By submitting a Proposal, the Applicant acknowledges they have read and understand the terms and conditions contained in the Solicitation and that they accept and agree to be bound by the terms and conditions of the Solicitation.
- b. **Instructions.** Applicant shall submit their Proposal in accordance with Section IV.
- c. **Forms.** Applicants shall submit the form(s) required under Section VI.
- d. **Documents.** Applicants shall provide the District with all documents and descriptive literature requested.
- e. **Facsimile.** The District will not accept hand delivered or facsimile delivered Proposals.
- f. **Identification of Proposals.**
  - i. The District is not responsible for Proposal's submitted in any manner, format or to any delivery point other than as required in the Solicitation.
- g. **Receipt of Proposal's.**
  - i. The Applicant is responsible for ensuring that the District receives their Proposal at the required delivery point prior to the closing due date and time. Proposal's shall be **emailed**

SECTION III – INSTRUCTIONS TO PROPOSERS  
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to: [Contracts@beaverton.k12.or.us](mailto:Contracts@beaverton.k12.or.us) Hand delivered or facsimile documents will not be accepted.

- ii. Timely received Proposal's will be opened, recorded and prepared for evaluation pursuant to Section III. There will not be a public opening of Proposal's **received and** the District will not read Proposals aloud.
- h. Failure to submit a Proposal in accordance with the provisions of this RFP shall be grounds to declare the Applicant non-responsive.
- i. **Certification.** Applicants shall (on the Proposer Certification form enclosed – ATTACHMENT A):
  - i. Identify that the Applicant is/or is not a "resident Applicant," as defined in ORS 279A.120(1);
  - ii. Indicate that the Applicant will comply with Prevailing Wage Laws ORS 279C.840 if applicable;
  - iii. Provide certification of nondiscrimination in obtaining any required subcontractors in accordance with ORS 279A.110(4); and
  - iv. Provide written acknowledgment of receipt of all Addenda.

**6. MODIFICATION OR WITHDRAWAL:**

- a. **Modifications.** An Applicant may modify their Proposal in writing prior to the Closing. An Applicant shall prepare and submit any modification to its Proposal to the District in accordance with OAR 137-49-0280. Any modification shall include the Applicant's statement that the modification amends and supersedes the prior Proposal. The Applicant shall email its modification and mark as follows:
  - i. "Proposal Modification"; and
  - ii. Solicitation No.
- b. **Withdrawals.**
  - i. An Applicant may withdraw its Proposal by Written notice submitted on the Applicants letterhead, signed by an authorized representative of the Applicant, received by the District prior to the Closing. The Applicant or authorized representative of the Applicant may also withdraw its Proposal in Person prior to the Closing, upon presentation of appropriate identification and satisfactory evidence of authority;
  - ii. The District may release an unopened withdrawn Proposal to the Applicant or its authorized representative and will confirm such release by email to the same address which originally submitted the Proposal.
  - iii. The Applicant shall mark the Written request to withdraw a Proposal as follows:
    - A. Proposal Withdrawal; and
    - B. Solicitation No.
- c. **Documentation.** The District shall include all documents relating to the modification or withdrawal of a Proposal in the Solicitation file.

**7. LATE RESPONSES, WITHDRAWALS, AND MODIFICATIONS:**

Any Proposal received after the Closing date and time is late. An Applicant's request for withdrawal or modification of a Proposal received after Closing is late and will not be considered (OAR 137-049-0350 or OAR 137-049-0390).

**8. MISTAKES:**

- a. **Generally.** To protect the integrity of the competitive Procurement process and to assure fair treatment of Applicants, the District will carefully consider whether to permit waiver,

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correction or withdrawal of Proposal for certain mistakes.

- b. **District Treatment of Mistakes.** The District shall not allow an Applicant to correct or withdraw a Proposal for an error in judgment. If the District discovers certain mistakes in a Proposal after Opening, but before Award of the Contract, the District may take the following action:
- i. The District may waive, or permit an Applicant to correct, a minor informality. A minor informality is a matter of form rather than substance that is evident on the face of the Proposal, or an insignificant mistake that can be waived or corrected without prejudice to other Applicants. Examples of minor informalities include an Applicant's failure to:
    - A. Return the correct number of Proposal copies or the correct number of other documents required by the Solicitation Document.
    - B. Sign the Proposal in the designated block, provided a Signature appears elsewhere in the Proposal, evidencing an intent to be bound; and
    - C. Acknowledge receipt of an Addendum to the Solicitation Document, provided that it is clear on the face of the Proposal that the Applicant received the Addendum and intended to be bound by its terms; or the Addendum involved did not affect price, quality or delivery.
  - ii. The District may correct a clerical error if the error is evident on the face of the Proposal or other documents submitted with the Proposal, and the Applicant confirms the District's correction in Writing. A clerical error is an Applicant's error in transcribing a portion of its Proposal. Examples include typographical mistakes, errors in extending unit prices, transposition errors, and math errors, instances in which the intended correct unit or amount is evident by simple arithmetic calculations. In the event of a discrepancy, unit prices shall prevail over extended prices.
  - iii. The District may permit an Applicant to withdraw a Proposal based on one or more clerical errors in the Proposal only if the Applicant shows with objective proof and by clear and convincing evidence:
    - A. The nature of the error;
    - B. That the error is not a minor informality under this subsection or an error in judgment;
    - C. That the error cannot be corrected or waived under subsection (ii) of this section;
    - D. That the Applicant acted in good faith in submitting a Proposal that contained the claimed error and in claiming that the alleged error in the Proposal exists;
    - E. That the Applicant acted without gross negligence in submitting a Proposal that contained a claimed error;
    - F. That the Applicant will suffer substantial detriment if the District does not grant the Applicant permission to withdraw the Proposal;
    - G. That the District's or the public's status has not changed so significantly that relief from the forfeiture will create a substantial hardship on the District or the public it represents; and
    - H. That the Applicant promptly gave notice of the claimed error to the District.
- c. **Rejection for Mistakes.** The District shall reject any Proposal in which a mistake is evident on the face of the Proposal and the intended correction to the Proposal is not evident or cannot be substantiated from documents submitted with the Proposal.

**9. NOTICE OF PRE-QUALIFICATION:**

- a. **Notice.** After all timely received Proposals have been evaluated, the District shall issue a notice to each Proposer of their qualification status.

SECTION III – INSTRUCTIONS TO PROPOSERS

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- b. **Form and Manner of Notice.** The form and manner of notice shall conform to customary practices within the District's procurement system, and may be made electronically.
- c. **Finalizing Award.** The District's Award of a contract shall not be final until the Notice of Intent to Award a contract has been publicly posted and any/all timely filed Protests have been adjudicated.

**10. REJECTION OF PROPOSALS:**

- a. **Rejection of Proposal.**
  - i. The District may reject any Proposal upon finding that to accept the Proposal may impair the integrity of the Procurement process, or that rejecting the Proposal is in the public interest.
  - ii. The District shall reject a Proposal upon the District's finding that the Proposal:
    - A. Is contingent upon the District's acceptance of terms and conditions (including Specifications) that differ from the Solicitation Document;
    - B. Takes exception to terms and conditions (including Specifications);
    - C. Attempts to prevent public disclosure of matters in contravention of the terms and conditions of the Solicitation Document or in contravention of applicable law;
    - D. Offers Work that fails to meet the Specifications of the Solicitation Document;
    - E. Is late;
    - F. Is not in substantial compliance with the Solicitation Documents;
    - G. Is not in substantial compliance with all prescribed public Solicitation procedures.
  - iii. The District shall reject a Proposal upon the District's finding that the Applicant:
    - A. Has been Disqualified;
    - B. Has been declared ineligible under ORS 279C.860 by the Commissioner of Bureau of Labor and Industries and the Contract is for a Public Work;
    - C. Is listed as not qualified by the Construction Contractors Board, if the Contract is for a Public Improvement;
    - D. Has not met the requirements of ORS 279A.105 if required by the Solicitation Document;
    - E. Has failed to provide the certification required under Section 13. Paragraph c. (Certification of Non-Discrimination)
    - F. Is not Responsible. See OAR 137-049-0390(2) regarding District determination that the Applicant has met statutory standards of responsibility.
- b. **Form of Business.** For purposes of this rule, the District may investigate any Person submitting a Proposal. The investigation may include that Person's officers, directors, owners, affiliates, or any other Person to determine application of this rule or to apply the Disqualification provisions of ORS 279C.440 to 279C.450 and OAR 137-049- 0370.
- c. **Certification of Non-Discrimination.** The Applicant shall certify on the Qualification Certification that the Applicant has not discriminated and will not discriminate against disadvantaged, minority, women, emerging small business enterprises, or service disabled veteran owned business enterprises in obtaining any required subcontracts. Failure to do so shall be grounds for disqualification.
- d. **Rejection of all Proposal's.** The District may reject all Proposal's for good cause upon the District's Written finding it is in the public interest to do so. The District shall notify all Applicants of the rejection of all Proposal's, along with the good cause justification and finding.
- e. **Criteria for Rejection of All Proposal's.** The District may reject all Proposal's upon a Written finding that:

SECTION III – INSTRUCTIONS TO PROPOSERS

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- i. The content of or an error in the Solicitation Document, or the Solicitation process unnecessarily restricted competition for the Contract;
- ii. The price, quality or performance presented by the Proposer is too costly or of insufficient quality to justify acceptance of the Proposal;
- iii. Misconduct, error, or ambiguous or misleading provisions in the Solicitation Document threaten the fairness and integrity of the competitive process;
- iv. Causes other than legitimate market forces threaten the integrity of the competitive Procurement process. These causes include, but are not limited to, those that tend to limit competition such as restrictions on competition, collusion, corruption, unlawful anti-competitive conduct and inadvertent or intentional errors in the Solicitation Document;
- v. The District cancels the Solicitation in accordance with OAR 137-049-0270; or
- vi. Any other circumstance indicating that awarding the Contract would not be in the public interest.

**11. PROTEST OF CONTRACTOR DENIAL OF PRE-QUALIFICATION:** Pursuant to OAR 137-049-0450

- a. **Purpose.** An adversely affected or aggrieved Proposer shall exhaust all avenues of administrative review and relief before seeking judicial review of the District's Contractor Pre-Qualification decision.
- b. **Notice of Pre-Qualification.** The District shall provide written notice, via email, to all Proposers of the status of their submissions for the associated RFP, and will publicly post notice of all pre-qualified Proposers on OregonBuys.
- c. **Right to Protest Denial of Pre-Qualification.** Firms found not Qualified have the right to appeal the decision. Procedures will be provided to any firm found to be not qualified.

**12. COSTS:** The District is not liable for any costs incurred by the Applicant in its proposal preparation.

**13. BUSINESS EQUITY:**

The Applicant understands that the District maintains a goal of engaging qualified disadvantaged, minority, women, emerging, service-disabled veteran businesses enterprises (D/M/W/ESB/SDVBE) as service providers in delivering services necessary to promote/provide business equity in our community. The District aspires to a goal of ten (10) percent D/M/W/ESB/SDVBE content, by contract value, in completing the work for this project, and the Contractor shall expend reasonable efforts to reach this content in the total value of their contracts with the District.

Additionally, the District will continue to partner with its contractors to provide career learning opportunities for students, providing them exposure to various potential career paths, including, but not limited to, construction, architecture, engineering and related services, legal and accounting services through programmatic involvement with the District's Career Pathways Program and Career Related Learning Experiences.

## SECTION IV – PROPOSAL CONTENT REQUIREMENTS

Solicitation No: RFP 21-0028

### 1. GENERAL INFORMATION

This section prescribes the mandatory submission format for Proposals submitted in response to this Solicitation. The purpose of the submission format is to ensure uniformity of the information from each Applicant and to aid in clear understanding and evaluation of all Proposals submitted.

### 2. PROPOSAL FORMAT

- a. Applicants must submit an electronic copy of its Qualifications.
  - i. Electronic copy shall be in a searchable PDF or MSWord format.
  - ii. Brochures or other promotional presentations beyond those sufficient to present a complete and effective submission of responses related to the evaluation criteria cited below are not desired. Elaborate artwork and expensive visuals are not necessary.
- b. Concise and direct answers are encouraged. There is a page limitation described in 3b (below).
- c. Failure to submit the Proposal in accordance with the provisions of the Solicitation document shall be grounds to declare the submission nonresponsive. Failure to provide any information requested in the Solicitation may result in rejection of the submission.

### 3. PROPOSAL CONTENT

Applicants shall submit Proposals containing all the information as required, and in the order listed.

- a. **REQUIRED FORMS.** Applicants shall return all of the attached forms, completed, and signed as necessary. Failure to submit any of these forms or if the information is found unacceptable, the Proposal may be rejected.
- b. **DETAILED REQUIREMENTS & EVALUATION.** Consultants must provide a proposal packet, including responses to each of the items delineated below (1-4). The Proposer Certification form (see attachments) shall be completed and submitted as the cover of the Proposer's response. This page and the required documents are not counted in the proposal page limitation. Provide a **concise but complete** response to each of the following criteria areas and do not assume the District has any prior knowledge of the Proposer. RFP response must be in the same order as presented below and each packet may not exceed 10 digital pages. Points will be awarded per section as noted below:

**1. Experience (45 points):** Please provide at least 3 examples of projects that are comparable to the projects described in the "Services Provided" sections. The best responses will include K-12 work and work completed within BSD.

- i. Identify any specific certifications or manufacturer affiliations/specialized training. The most points will be awarded to contractors with valid and applicable affiliations and training.

**2. Personnel (30 points):** Please provide an overview of your firm including its size, number of journeymen within each trade (mechanical, plumbing, and/or electrical) and office location(s). Please identify who will be our account representative and their qualifications. The best responses will have information concerning personnel who have worked on the projects listed in the Experience section.

- a. For any trades for which you do not have in house personnel, please list your preferred sub-contractors. For example, trades which may not be in house are roofing, electrical or mechanical/structural engineering.

SECTION IV – PROPOSAL CONTENT REQUIREMENTS

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a. **3. References (Pass/Fail):** Please provide at least three references. The best references will be from the projects referenced in the experience section. If your firm has done any work with BSD, they must be provided as a reference for that work.

**4. Hourly Rates (25 points):** Please complete the attached pricing sheet for hourly rates and minimum call rates. These rates will be scored based on a score model. The lowest value calculated by the scoring model will be awarded full points with remaining proposers being awarded a portion of the points based on their ratio to lowest value.

**4. SCORING**

a.

<b>Evaluation Criteria:</b>	<b>Points Possible</b>
Experience	45
Personnel	30
References	Pass/Fail
Hourly Rates	25
<b>Total Possible Points:</b>	<b>100</b>
Interviews (if needed)	30

**1. EVALUATION OF PROPOSALS.**

The District will form an evaluation committee, made up of not less than three members, representing the District, to evaluate and measure the merit of each of the Qualifications above. Firms that receive a "Pass" grade for both Required Forms and an average score of 80 points or better in the Evaluation Criteria as delineated in Section IV Proposal Content Requirements, will be deemed to have available the appropriate material, equipment, facility, and personnel resources and expertise, or can obtain the resources and expertise necessary to meet all contractual responsibilities. Eligible firms based on criteria stated above will be eligible to be awarded a Master Contract with the District. It is the intent of the District to award up to five (5) prime Master Contracts within the Project Group.

- a. Required Forms (each will receive points-assigned grading)  
Proposer Certification  
Proposer Responsibility Form

- b. Scoring  
Eligible                      80-100 points: Proposal meets RFP requirements and offers an acceptable level of competency. The firm proposing has available the appropriate personnel, resources, and expertise, or has the ability to obtain the resources and expertise necessary to meet all the contractual responsibilities and may be awarded a Master Contract.

Not Eligible                0-79 points: Proposal is considered to contain insufficient qualifications. The Firm has not demonstrated they have the appropriate personnel, resources, and expertise, or has the ability to obtain the resources and expertise necessary to meet all the contractual responsibilities to the Owner's satisfaction. This firm will not be eligible to be awarded a Master Contract.

**2. EVALUATION OF INTERVIEWS (IF NEEDED)**

The District may choose to interview the top scoring proposers with a score meeting the minimum average score of 80, and may award up to five (5) master contracts following the interviews. Interviewees will be provided with questions and format prior to the interview taking place. When the interviews are completed the scores from the interviews will be the sole determinant for the award of the contract. The District may award up to Five (5) Master Contracts following the interview process.

## PROPOSAL SUBMISSION CHECKLIST

**ALL CERTIFICATIONS, FORMS AND PROPOSAL CONTENT REQUIREMENTS AS SPECIFIED IN SECTION IV MUST BE INCLUDED IN PROPOSALS.**

### \_\_\_\_ **REQUIRED AFFIDAVIT, CERTIFICATIONS AND FORMS**

The following completed certifications and forms must be signed by the person authorized to represent the Proposer regarding all matters related to the Proposal and authorized to bind the Proposer to the agreement. Failure to submit any of the required, completed and signed certifications/forms shall result in disqualification of the proposing firm.

- \_\_\_\_ PROPOSER CERTIFICATION - This serves as the cover sheet for your Proposal. (Attachment A)
- \_\_\_\_ AFFIDAVIT OF NON-COLLUSION / COMPLIANCE WITH TAX LAWS. (Attachment B)
- \_\_\_\_ NON-CONFLICT OF INTEREST CERTIFICATION. (Attachment C)
- \_\_\_\_ PROPOSER RESPONSIBILITY FORM – All Pages. (Attachment D)
- \_\_\_\_ PROPOSER REFERENCE FORMS – Include the # specified on the form. See SECTION IV. (Attachment E)

### \_\_\_\_ **RESPONSES TO DETAILED PROPOSAL CONTENT REQUIREMENTS**

Detailed Proposal Content Requirements are specified in SECTION IV.

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The following attachment(s) are **NOT** to be returned with the Proposal. The content of these attachment(s) must be reviewed by the Proposer. The terms and conditions will apply to the Contract to be executed for the work.

- ATTACHMENT F      Sample PWA Contract
- ATTACHMENT G      Covid Attestation Form (Must be returned with Signed Contract)

---

This checklist is provided for the Proposer's convenience in assembling your proposal and is **NOT** required to be returned with the proposal.

SECTION V- ATTACHMENTS  
 Solicitation No: RFP 21-0028  
 ATTACHMENT A  
**PROPOSER CERTIFICATION**

Respectfully submitted this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.



Signature: \_\_\_\_\_

Name: \_\_\_\_\_  
 (Please type or print)

Phone: \_\_\_\_\_

Title: \_\_\_\_\_

Email Address: \_\_\_\_\_

Firm/Company Name: \_\_\_\_\_

Physical Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

1. The Proposer certifies that he or she has read and understands all terms and conditions of this solicitation.
2. The Proposer acknowledges that the person that signs this Certification is fully authorized to sign on behalf of the Proposer listed and to fully bind the Proposer to all conditions and provisions thereof.
3. The Proposer certifies that Proposer has complied or will comply with all requirements of local, state, and national laws, and that no legal requirement has been or will be violated in making or accepting this RFP.
4. The Proposer holds a certificate from the Oregon State Board of Architect Examiners, the Oregon State Landscape Architect Board, or the Oregon State Board of Examiners for Engineering and Land Surveying as applicable:  
 Registration #: \_\_\_\_\_.
5. The Proposer, pursuant to ORS 279A.120 (1), (check one) is \_\_\_\_\_/is not \_\_\_\_\_ a resident Bidder.  
 If not, indicate State of residency \_\_\_\_\_.
6. The Proposer certifies that it has not discriminated and will not discriminate, in violation of ORS 279A.110, against any disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business that is certified under ORS 200.055 in obtaining any required subcontract.
7. The Proposer agrees to comply with Oregon tax laws in accordance with ORS 305.385.
8. The Proposer acknowledges receipt of the following addenda: (list by number and date appearing on addenda.)

Addendum Number	Date	Addendum Number	Date
_____	_____	_____	_____
_____	_____	_____	_____

ATTACHMENT B

AFFIDAVIT OF NON-COLLUSION / COMPLIANCE WITH TAX LAWS

Proposer: \_\_\_\_\_

I state that:

- (1) The correct taxpayer identification numbers are:  
A. Federal Employer ID Number (EIN): \_\_\_\_\_ B. Employer's Oregon ID Number: \_\_\_\_\_
- (2) Proposer is not subject to backup withholding because (i) Proposer is exempt from backup withholding, (ii) Proposer has not been notified by the IRS that Proposer is subject to backup withholding as a result of a failure to report all interest or dividends, or (iii) the IRS has notified Proposer that Proposer is no longer subject to backup withholding;
- (3) The price(s) and amount of this proposal shall be arrived at independently and without consultation, communication or agreement with any other consultant, proposer or potential proposer, except as disclosed on the attached appendix.
- (4) That neither the price(s) nor the amount of this proposal, and neither the approximate price(s) nor approximate amount of this proposal, shall be disclosed to any other firm or person who is a proposer or potential proposer, and they will not be disclosed before Contract award.
- (5) No attempt has been made or will be made to induce any firm or person to refrain from proposing on this contract, or to submit any noncompetitive proposal or other complementary proposal.
- (6) The proposal of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.
- (7) \_\_\_\_\_ (name of firm), its affiliates, subsidiaries, officers, directors and employees are not currently under investigation by any governmental agency and have not in the last four years been convicted of or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to proposing on any public contract, except as described in the attached appendix.

I state that \_\_\_\_\_ (name of firm) understands and acknowledges that the above representations are material and important, and will be relied on by the Beaverton School District in awarding the contract(s) for which this proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is and shall be treated as fraudulent concealment from the Beaverton School District of the true facts relating to the submission of proposals for this contract. I am authorized to act on behalf of Proposer, and have authority and knowledge regarding Proposer's payment of taxes, and to the best of my knowledge, Proposer is not in violation of any Oregon tax laws, including, without limitation, those tax laws listed in ORS 305.380(4); the elderly rental assistance program under ORS 310.630 to 310.706; and any local taxes administered by the Oregon Department of Revenue under ORS 305.620.

 \_\_\_\_\_  
(Affiant's Signature)

STATE OF OREGON

County of \_\_\_\_\_

Signed and sworn to before me on \_\_\_\_\_ by

\_\_\_\_\_ (date)

\_\_\_\_\_ (Affiant's name)

Notary: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

**NON-CONFLICT OF INTEREST CERTIFICATION**

**Issuing Agency:** Beaverton School District

I, \_\_\_\_\_ hereby certify I have read the statement defining conflict of interest as quoted below; that I understand the statement; that no conflict of interest exists as therein defined, which precludes an impartial Bid/Proposal to be submitted by myself or the entity/company for which the Bid/Proposal is submitted, and that if such a conflict should arise, I will immediately notify the Beaverton School District and disqualify my Bid/Proposal.

**"NO OFFICER, EMPLOYEE, OR AGENT OF THE BIDDER/PROPOSER HAS ANY PERSONAL FINANCIAL INTEREST, DIRECT OR INDIRECT, IN THE OPERATION OF THE BEAVERTON SCHOOL DISTRICT OR WITH ANY PARTY CONNECTED WITH THE OREGON SCHOOL AND DISTRICT IMPROVEMENT NETWORK, DIRECTLY OR INDIRECTLY."**

 Signature: \_\_\_\_\_

Name: \_\_\_\_\_  
(Please type or print)

Title: \_\_\_\_\_

Firm/Company Name: \_\_\_\_\_  
(Please type or print)

Date: \_\_\_\_\_

**PROPOSER RESPONSIBILITY FORM****DECLARATION AND SIGNATURES**

The undersigned hereby declares that the he or she is duly authorized to complete and submit this Responsibility Form and that the statements contained herein are true and correct as of the date set forth below. Incomplete, incorrect or misleading information will be reason for the District to reject this Proposal.

Date: \_\_\_\_\_

By: \_\_\_\_\_  
(Signature of authorized official)Name: \_\_\_\_\_  
(Please type or print)Title: \_\_\_\_\_  
(Please type or print)For: \_\_\_\_\_  
(Firm's name) (Please type or print)

CCB#: \_\_\_\_\_

**Instructions**

- 1. The information provided in this form is part of the District's inquiry concerning responsibility. Please print clearly or type.**
- 2. If you need more space, use plain paper. Submit completed form with Bid response.**
- 3. Answer all questions. Submission of a form with unanswered questions, incomplete or illegible answers may result in a finding of Disqualified.**

**CURRENT CONTRACTS IN FORCE**

ITEM	CONTRACT 1		CONTRACT 2	
A. Work Location				
B. Scope of Work;				
Check box:	<input type="checkbox"/> New Construction	<input type="checkbox"/> Re-Construction	<input type="checkbox"/> New Construction	<input type="checkbox"/> Re-Construction
C. Contract Amount	\$		\$	
D. Change Order Amount	\$		\$	
E. % Completed	%		%	
F. Est. Completion Date				
G. Owner's Name				
H. Owner Contact				
I. Telephone	( )		( )	
J. E-Mail Address				
ITEM	CONTRACT 3		CONTRACT 4	
A. Work Location				
B. Scope of Work;				
Check box:	<input type="checkbox"/> New Construction	<input type="checkbox"/> Re-Construction	<input type="checkbox"/> New Construction	<input type="checkbox"/> Re-Construction
C. Contract Amount	\$		\$	
D. Change Order Amount	\$		\$	
E. % Completed	%		%	
F. Est. Completion Date				
G. Owner's Name				
H. Owner Contact				
I. Telephone	( )		( )	
J. E-Mail Address				

**LARGEST SIMILAR JOBS YOU HAVE COMPLETED IN THE LAST FIVE YEARS**

ITEM	CONTRACT 1		CONTRACT 2	
A. Work Location				
B. Scope of Work; Check box:	<input type="checkbox"/> New Construction	<input type="checkbox"/> Re-Construction	<input type="checkbox"/> New Construction	<input type="checkbox"/> Re-Construction
C. Contract Amount	\$		\$	
D. Change Order Amount	\$		\$	
E. % Completed	%		%	
F. Completion Date				
G. Owner's Name				
H. Owner Contact				
I. Telephone	( )		( )	
J. E-Mail Address				



SECTION V- ATTACHMENTS  
Solicitation No: RFP 21-0028  
ATTACHMENT D

**RELIABILITY**

Has your company ever been declared in breach of any contract for unperformed or defective work?  Yes.  
 No.

If "yes", explain.

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Has any employee or agent of your company ever been convicted of a criminal offense arising out of obtaining, attempting to obtain, or performing a public or private contract or subcontract?  Yes.  No.

If "yes," explain.

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Has any employee or agent of your company been convicted under state or federal law of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property or any other offense indicating a lack of business integrity or business honesty?  Yes.  No.

If "yes," explain.

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Has your company or any employee or agent of your company been convicted under state or federal antitrust laws?  Yes.  No.

If "yes," explain.

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Has any Officer or Partner of your organization ever been an Officer or Partner of another Organization that failed to complete a construction contract?  Yes.  No.

If "yes," explain.

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**FINANCIAL RESOURCES**

Has your firm ever been at any time in the last ten years the debtor in a bankruptcy case?  Yes.

No.

If “yes,” explain.

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Does your firm have any outstanding judgments pending against it?  Yes.  No.

If “yes,” explain.

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In the past ten years, has your firm been a party to litigation, arbitration or mediation where the amount in dispute exceeded \$10,000?  Yes.  No.

If “yes,” explain.

(Include court, case number and party names.) \_\_\_\_\_

---

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In the past ten years, has your firm been a party to litigation, arbitration or mediation on a matter related to payment to subcontractors or work performance on a contract? Check “yes” even if the matter proceeded to arbitration or mediation without court litigation.  Yes.  No.

If “yes,” explain. (Include court, case number and party names.)

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Have you or any of your affiliates discontinued business operation with outstanding debts?  Yes.

No.

If “yes,” explain.

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SECTION V – ATTACHMENTS

Solicitation No: RFP 21-0028

ATTACHMENT D

**KEY PERSONNEL**

List the principal individuals of your company, their current job title, the total years of experience they have in the industry and their current primary responsibility for your company. Corporations list current officers and those who own 5% or more of the corporation’s stock. Limited liability companies list members who own 5% or more of company. Partnerships list all partners. Joint ventures list each firm that is a member of the joint venture and the percentage of ownership the firm has in the joint venture.

ITEM	Principal Individual
A. Name	
B. Position	
C. Years in Construction	
D. Current Primary Responsibility	
ITEM	Principal Individual
A. Name	
B. Position	
C. Years in Construction	
D. Current Primary Responsibility	
ITEM	Principal Individual
A. Name	
B. Position	
C. Years in Construction	
D. Current Primary Responsibility	
ITEM	Principal Individual
A. Name	
B. Position	
C. Years in Construction	
D. Current Primary Responsibility	

SECTION V – ATTACHMENTS  
Solicitation No: RFP 21-0028  
ATTACHMENT E

**PROPOSER REFERENCE FORM**

PROPOSER REFERENCE FORM FOR \_\_\_\_\_  
(Insert Name of Consultant)

*Provide three (3) references and use a separate copy of this form for each reference.*

Date(s) Work Performed: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name(s) of Project(s): \_\_\_\_\_

\_\_\_\_\_

Value of Project(s): \$ \_\_\_\_\_

Name of Company: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Contact Name: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Method: Subjective Evaluation

Each reference may be checked for, but not limited to, overall customer service, projects being of similar size, scope and complexity.

PWA No: \_\_\_\_\_

This Project Work Authorization is made by and between the following Parties:

	Beaverton School District 16550 SW Merlo Road Beaverton, Oregon 97003  Attention: Business Services Purchasing
--	--

**PROJECT NAME / SCOPE OF WORK:** as described in

**SUPERSEDING EFFECT:** This Project Work Authorization (Contract) is issued pursuant to Master Contract **XX-XXXX**. The Master Contract and its Terms and Conditions supersede any terms or conditions stipulated by Consultant in any offer or proposal. All attachments hereto (listed in order of precedence); 1) Master Contract (included by reference); 2) **Exhibit A** Statement of Work; and 3) **Exhibit B** Consultant Offer for this Project constitute the entire agreement between the Parties with respect to the Work to be performed under this Contract.

Any Consultant Response (proposals) attached to this Agreement are incorporated solely for: (i) any statement of fees and schedule that is consistent with the terms of the Solicitation, this Agreement and the Master Contract and (ii) any statement of Consultant's and its sub-Consultants' scope of services that is consistent with the remainder of this Agreement, or that provides basic services in addition to those stated in this Agreement. No other provisions of any proposal are part of this Agreement, including without limitation any purported limitation on liability. To the extent that a proposal term otherwise conflicts with the terms of this Agreement or is not included in this agreement, such proposed terms are void and are expressly and wholly subject to the terms of this Agreement. In the event of overlap or inconsistency between the provisions of such proposals and the other terms of this Agreement, the provision that provides a better quality or quantity of service to the District shall control.

**CONSIDERATION:** The District agrees to pay the Consultant for Work performed in a satisfactory manner a total not to exceed \$**XXXX.XX** on a time and materials basis. The Consultant must submit one invoice at the completion of the Work or must submit an invoice for Work performed at the specific intervals agreed upon by the District. Invoice(s) shall be submitted Attn: Accounts Payable to the District address above. All invoice(s) and correspondence shall include the Contract number.

**PERFORMANCE DATES:** **PROJECT START DATE:** Upon Full PWA Execution

**SUBSTANTIAL COMPLETION DATE:** \_\_\_\_\_ **PROJECT COMPLETION DATE:** \_\_\_\_\_

**DISTRICT REPRESENTATIVE:** The District Representative, \_\_\_\_\_, at \_\_\_\_\_@beaverton.k12.or.us, (503)356-\_\_\_\_\_, is authorized as the administrator of this Contract. The District Representative shall be the initial point of contact for all matters related to performance, payment, authorization and to carry out the responsibilities of the District.

**BUSINESS EQUITY:** The Contractor understands that the District maintains a goal of engaging minority, women, emerging, service-disabled veteran and socially or economically disadvantaged businesses (DMWESBSDLVBE) as service providers in delivering services necessary to implement our bond program. The District aspires to a goal of ten (10) percent DMWESBSDLVBE content, by contract value, in completing our capital bond work, and the Contractor shall expend reasonable efforts to reach this content in the total value of their contracts with the District.

In consideration of the mutual covenants, stipulations and agreements, the Parties hereto do agree and acknowledge that they have read and understand this Contract and agree to be bound by its terms and conditions:

<b>Beaverton School District</b>  <hr/> District Representative _____ Date _____  <hr/> Cost Center Authority _____ Date _____  <hr/> Business Services Purchasing _____ Date _____  <b>Not a valid Contract until all req'd. signatories are complete</b>	<b>Consultant/Company Name</b>  <hr/> (typed or printed name of officer)  <hr/> Signature _____ Date _____  Title: _____  Phone/Fax: _____  Email: _____
--	--



PURCHASING DEPARTMENT
16550 SW Merlo Road,
Beaverton, OR 97003-5152
Phone: 503-356-4379
contracts@beaverton.k12.or.us
Larry Pelatt – Purchasing Manager



COVID VACCINATION ATTESTATION FOR BEAVERTON SCHOOL DISTRICT (BSD) CONTRACTORS, SUPPLIERS, AND/OR SERVICE PROVIDERS.

BSD PROJECT NAME \_\_\_\_\_ BSD CONTRACT NUMBER \_\_\_\_\_

In accordance with OAR 333-019-1030, all persons engaged to provide goods and/or services at a BSD school or school-based program which takes place at or in school facilities, must be fully vaccinated against COVID-19 or have a documented medical or religious exemption. Contractors, subcontractors, and any associated personnel coming to the site are required to be fully vaccinated if they will have direct or indirect contact with students in the course of performing their work. Unvaccinated persons with documented medical or religious exemptions may still be refused access to school sites if the anticipated work would/could put them in direct or indirect contact with students or staff.

Contractor \_\_\_\_\_ by (Authorized Representative) \_\_\_\_\_ attests that all of their employees, associates, subcontractors or agents are in compliance with this rule.

Contractor agrees that it is their obligation to obtain documentation of compliance with this rule from each of its employees, associates, agents, or subcontractors.

Contractor further agrees that it will maintain records of such documentation, including vaccination verification and documentation of medical or religious exemptions, for at least two years from the completion of the project. Contractor further agrees to furnish proof of compliance with this rule to the District at their request and in their sole discretion.

Contractor agrees to indemnify, defend, and hold harmless the District from any violations or civil penalties assessed as a result of Contractor failing to comply with this rule.

Contractor also agrees that Contractor will not pursue, nor will any of their employees, associates, agents, or subcontractors pursue any action against Beaverton School District in the event any of their employees, associates, agents, or subcontractors contracts COVID as a result of the provision of goods or services to Beaverton School District.

Agreed to this \_\_\_\_\_ Day of \_\_\_\_\_ 20\_\_

(Contractor) \_\_\_\_\_ Beaverton School District

By: \_\_\_\_\_ By: \_\_\_\_\_

Title: \_\_\_\_\_ Title: \_\_\_\_\_

Date: \_\_\_\_\_ Date: \_\_\_\_\_