

CHECKLIST TO DESIGNATE AREAS OF EVALUATION FOR REQUESTS FOR PROPOSAL (RFP)

MDOT PROJECT MANAGER			JOB NUMBER (JN)	CONTROL SECTION (CS)
DESCRIPTION				
MDOT PROJECT MANAGER: Check all items to be included in RFP WHITE = REQUIRED GRAY SHADING = OPTIONAL			CONSULTANT: Provide only checked items below in proposal	
Check the appropriate Tier in the box below				
TIER I (\$25,000-\$99,999)	TIER II (\$100,000-\$250,000)	TIER III (>\$250,000)		
			Understanding of Service	
			<i>Innovations</i>	
			<i>Safety Program</i>	
N/A			Organizational Chart	
			Qualifications of Team	
			Past Performance	
Not required As part of Official RFP	Not required As part of Official RFP		Quality Assurance/Quality Control	
			Location: The percentage of work performed in Michigan will be used for all selections unless the project is for on-site inspection or survey activities, then location should be scored using the distance from the consultant office to the on-site inspection or survey activity.	
N/A	N/A		Presentation	
N/A	N/A		Technical Proposal (if Presentation is required)	
3 pages (MDOT Forms not counted) (No Resumes)	7 pages (MDOT Forms not counted)	19 pages (MDOT Forms not counted)	Total maximum pages for RFP not including key personnel resumes	

The Michigan Department of Transportation (MDOT) is seeking professional services for the project contained in the attached scope of services.

If your firm is interested in providing services, please indicate your interest by submitting a Proposal, Proposal/Bid Sheet or Bid Sheet as indicated below. The documents must be submitted in accordance with the latest "Consultant/Vendor Selection Guidelines for Service Contracts" and "Guideline for Completing a Low Bid Sheet(s)", if a low bid is involved as part of the selection process. **Referenced Guidelines are available on MDOT's website under Doing Business > Vendor/Consultant Services > Vendor/Consultant Selections.**

RFP SPECIFIC INFORMATION

BUREAU OF HIGHWAYS

BUREAU OF TRANSPORTATION PLANNING **

OTHER

THE SERVICE WAS POSTED ON THE ANTICIPATED QUARTERLY REQUESTS FOR PROPOSALS

NO

YES

DATED _____

THROUGH _____

Prequalified Services – See page ___ of the attached Scope of Services for required Prequalification Classifications.

Non-Prequalified Services - If selected, the vendor must make sure that current financial information, including labor rates, overhead computations, and financial statements, if overhead is not audited, is on file with MDOT's Office of Commission Audits. This information must be on file for the prime vendor and all sub vendors so that the contract will not be delayed. **(Form 5100J Required with Proposal)**

Qualifications Based Selection – Use Consultant/Vendor Selection Guidelines

For all Qualifications Based Selections, the section team will review the information submitted and will select the firm considered most qualified to perform the services based on the proposals. The selected vendor will be contacted to confirm capacity. Upon confirmation, that firm will be asked to prepare a priced proposal. Negotiations will be conducted with the firm selected.

****For RFP's that originate in Bureau of Transportation Planning only**, a priced proposal must be submitted at the same time as, but separate from, the proposal. Submit directly to the Contract Administrator/Selection Specialist, Bureau of Transportation Planning (see address list, page 2). The priced proposal must be submitted in a sealed envelope, clearly marked "**PRICE PROPOSAL.**" The vendor's name and return address **MUST** be on the front of the envelope. The priced proposal will only be opened for the highest scoring proposal. Unopened priced proposals will be returned to the unselected vendor(s). Failure to comply with this procedure may result in your priced proposal being opened erroneously by the mail room.

For a cost plus fixed fee contract, the selected vendor must have a cost accounting system to support a cost plus fixed fee contract. This type of system has a job-order cost accounting system for the recording and accumulation of costs incurred under its contracts. Each project is assigned a job number so that costs may be segregated and accumulated in the vendor's job-order accounting system.

Qualifications Review / Low Bid - Use Consultant/Vendor Selection Guidelines. See Bid Sheet Instructions for additional information.

For Qualification Review/Low Bid selections, the selection team will review the proposals submitted and post the date of the bid opening on the MDOT website. The notification will be posted at least two business days prior to the bid opening. Only bids from vendors that meet proposal requirements will be opened. The vendor with the lowest bid will be selected. The selected vendor may be contacted to confirm capacity.

Best Value - Use Consultant/Vendor Selection Guidelines. See Bid Sheet Instructions below for additional information. The bid amount is a component of the total proposal score, not the determining factor of the selection.

Low Bid (no qualifications review required - no proposal required.) See Bid Sheet Instructions below for additional instructions.

BID SHEET INSTRUCTIONS

A bid sheet(s) must be submitted in accordance with the "Guideline for Completing a Low Bid Sheet(s)" (available on MDOT's website). The Bid Sheet(s) is located at the end of the Scope of Services. Submit bid sheet(s) separate from the proposal, to the address indicated below. The bid sheet(s) must be submitted in a sealed manila envelope, clearly marked "**SEALED BID.**" The vendor's name and return address **MUST** be on the front of the envelope. Failure to comply with this procedure may result in your bid being opened erroneously by the mail room and the bid being rejected from consideration.

PROPOSAL SUBMITTAL INFORMATION

REQUIRED NUMBER OF COPIES FOR PROJECT MANAGER	PROPOSAL/BID DUE DATE	TIME DUE
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PROPOSAL AND BID SHEET MAILING ADDRESSES

Mail the multiple proposal bundle to the MDOT Project Manager or Other indicated below.

MDOT Project Manager

MDOT Other

Mail one additional stapled copy of the proposal to the Lansing Office indicated below.

Lansing Regular Mail	OR	Lansing Overnight Mail
Secretary, Contract Services Div - B470 Michigan Department of Transportation PO Box 30050 Lansing, MI 48909		Secretary, Contract Services Div - B470 Michigan Department of Transportation 425 W. Ottawa Lansing, MI 48933
Contract Administrator/Selection Specialist Bureau of Transportation Planning B470 Michigan Department of Transportation PO Box 30050 Lansing, MI 48909		Contract Administrator/Selection Specialist Bureau of Transportation Planning B470 Michigan Department of Transportation 425 W. Ottawa Lansing, MI 48933

GENERAL INFORMATION

Any questions relative to the scope of services must be submitted by e-mail to the MDOT Project Manager. Questions must be received by the Project Manager at least four (4) working days prior to the due date and time specified above. All questions and answers will be placed on the MDOT website as soon as possible after receipt of the questions, and at least three (3) days prior to the RFP due date deadline. The names of vendors submitting questions will not be disclosed.

MDOT is an equal opportunity employer and MDOT DBE firms are encouraged to apply. The participating DBE firm, as currently certified by MDOT’s Office of Equal Opportunity, shall be listed in the Proposal

MDOT FORMS REQUIRED AS PART OF PROPOSAL SUBMISSION

5100D – Request for Proposal Cover Sheet

5100J - Consultant Data and Signature Sheet (Required only for Non-Prequalified Work)

(These forms are not included in the proposal maximum page count.)



Michigan Department of Transportation

**SCOPE OF SERVICE
FOR
SPECIALTY SERVICES**

Rest Area Geothermal Heat Pump System Installation

Revised Due Date: 8/16/2011

CONTROL SECTION: N/A

JOB NUMBER: N/A

PROJECT LOCATION: The MDOT Rest Areas at the following locations:

I-94 EB near Chelsea, Washtenaw County, Michigan

M-28 near Seney, Schoolcraft County, Michigan

PROJECT DESCRIPTION:

As described in more detail below, the MDOT will accept proposals to develop and install a geothermal heat pump system at two rest area facilities for the purpose of reducing energy costs and fossil fuel use in rest areas.

The installation, operation, and maintenance documented in the proposal must comply with applicable building codes and laws, interface with existing building features and utilities, and be physically and financially feasible.

Those submitting proposals must demonstrate:

- (i) experience and capacity to develop and install a geothermal heat pump system;
- (ii) the ability to address design considerations for the proposed facility;
- (iii) the ability to implement a geothermal heat pump system that will reduce energy costs and demonstrate a benefit to MDOT and the State of Michigan.

Each proposal must be in the format and include all the elements addressed under “Work Specifications” of this RFP. Submission Requirements include a conceptual design and installation plan.

Total project cost (including design, procurement, installation, commissioning, maintenance and warranty) shall not exceed \$155,000:

Chelsea: \$105,000.00

Seney: \$50,000.00

Revised Final Posted Scope: 8/8/2011

ANTICIPATED SERVICE START DATE: September 1, 2011

ANTICIPATED SERVICE COMPLETION DATE: December 30, 2011

PRIMARY PREQUALIFICATION CLASSIFICATION(S):

N/A

SECONDARY PREQUALIFICATION CLASSIFICATION(S):

N/A

DBE REQUIREMENT: N/A

MDOT PROJECT MANAGER:

Lynn Lynwood, Manager
Roadside Development Program
Michigan Department of Transportation
Murray D. Van Wagoner Transportation Building
P.O. Box 30050
Lansing, Michigan 48909
Phone: (517) 373-0026
Fax: (517) 335-2731
Email: lynwoodl@michigan.gov

PURPOSE OF REQUEST FOR PROPOSAL (RFP)

The Michigan Department of Transportation is committed to exploring ways of reducing our overall facility energy costs to the greatest extent possible. Through issuance of this Request for Proposals (RFP) MDOT is seeking proposals to develop and install a geothermal heat pump project at the Seney rest area and the Chelsea rest area. The goals of this project are:

- A. Reduce energy costs at this facility.
- B. Reduce fossil fuel energy consumption at this rest area.
- C. Reduce the impacts of energy production and use on the environment.
- D. Provide a public demonstration of geothermal heat pump technology in support of the State of Michigan's policy to encourage renewable energy resource development.

Issuing Office

This Request for Proposal (RFP) is issued by the Michigan Department of Transportation (MDOT). Oversight and project management will be performed by the project manager. ARRA reporting for the project will be coordinated by the Project Manager through the Office of Operations Administrative Services, Facilities Administration and Operations.

Terminology

Project Engineer

The Department's authorized representative for the Rest Area Geothermal Heat Pump System who will direct the Consultant.

Geothermal Heat Pump System

For the purposes of this document, this is the generic term which would encompass all permits, equipment, hardware and installation for a geothermal heat pump system. The specifics of the desired system will be outlined later in this RFP.

Incurring Costs

MDOT is not liable for any cost incurred by the Consultant prior to issuance of a contract, including costs for preparation of the proposal.

CONSULTANT RESPONSIBILITIES:

The selected Consultant will be required to assume responsibility for all services required in this proposal. Primary responsibilities include, and are not limited to, the full development, design, procurement, installation, and implementation of a geothermal heat pump system for the rest area locations identified above and according to the specifications outlined herein.

If any part of the work is subcontracted, the Consultant must provide a complete description of the work to be subcontracted and descriptive information about the subcontractor's organization and capabilities to perform the work. The Consultant is responsible for adherence of the subcontractor(s) to all provisions of the contract.

REQUIRED QUALIFICATIONS:

The Consultant must be a certified Geothermal Service Contractor (GSC) and shall have **at least two years** of successful installation experience similar to that required for this project.

The Consultant must demonstrate, at a minimum, the ability to maintain sufficient staff resources to implement the services required of this project. A list of all key staff and their roles shall be provided, as well as key staff for any subcontractor(s) being used by the Consultant.

The Consultant must maintain liability insurance coverage for protection of the Consultant and MDOT and its state partners, against loss or damage to any and all equipment/systems in the facility and from claims for damage to public or private property and any and all claims for injuries to persons which may arise out of or result from the equipment and/or the installation, removal, use, operation, malfunction, and/or maintenance of the equipment or systems. Documentation of the required insurance coverage and limits of liability for the facility, systems, and services shall be provided to MDOT as described in Section II of this RFP.

The Consultant must procure and install the equipment/systems of this project to meet all federal, state, and/or manufacturer requirements. The Consultant may perform work at its own offsite facility or onsite at the rest areas. If maintenance requires removal of equipment and/or system components from the rest areas, then the Consultant must complete the maintenance activities within 24 hours of notice or replace the equipment/system components so that the overall system is again fully functional. All work performed at the rest area must have prior approval by MDOT.

Non Performance Penalty

Failure to comply with the contract document shall be grounds for breach of contract and will result in contract termination upon 30 days of written notice.

SELECTION CRITERIA

A team of MDOT staff and representatives will be used to evaluate responses to the RFP based upon the following factors as presented in the Consultant's proposal. Oral interviews may be requested during the selection process. These are listed in order of importance and a scoring factor has been provided for each category, with a total of 100 points possible.

Understanding of the Project Needs (20 pts.)

- Describe understanding of the project needs, innovation and/or product to be proposed.
- Ability to demonstrate a viable plan for the development, installation and maintenance of a geothermal heat pump system.
- Provide a schedule outlining the proposed work and milestone dates
- Provide a quality assurance plan

Project Cost (30 pts)

- Total cost to develop, procure, and install a functioning geothermal heat pump system.

Past Performance/Experience in Providing Geothermal Heat Pump System (15 pts.)

- Records of past performance including such things as quality of work, ability to meet deadlines/schedules, and ability to develop and deliver a quality product.
- List a minimum of three (3) references including names, addresses, phone numbers, fax numbers, and email addresses.

Key Staff (10 pts.)

- Capability and qualification of key individuals including previous work on similar projects, technical expertise, education and training.
- Describe roles for key personnel and sub-consultants

System Maintenance and Service Life (10 pts.)

- Annual operating and maintenance needs and costs.
- Long term (10+ years) maintenance needs and costs
- Estimated service life assuming properly maintained

System Warranty (10 pts.)

- Minimum 5 years for entire system
- Service/Installation Warranty – 2 Years minimum
- Points will be awarded based on length of warranty provided on equipment and labor.

Location (5 pts.)

- A Consultant with a business presence in Michigan. The Consultant is required to provide the location of where the work will be performed.

MDOT'S RESERVED RIGHTS

MDOT will award the contract to the most responsive Consultant subject to final agreement on the scope of service and contract provisions.

MDOT may conduct an evaluation to ensure that the successful Consultant has adequate facilities and staff to provide the proposed service. MDOT may also perform a compliance review regarding safety, installation, operations, and maintenance capabilities.

MDOT will also have final approval of the plans and specifications.

WORK SPECIFICATIONS

Geothermal Heat Pump System

This project will specifically include: Fully commissioned and operational geothermal heat pump system installation and implementation at the following rest area locations:

I-94 EB near Chelsea, Washtenaw County, Michigan M-28 near Seney, Schoolcraft County, Michigan

The project will include an appropriate, commercially available, cost effective, and energy saving geothermal heat pump system that is compatible with existing systems. **Installation must include a technology that does not generate toxic or hazardous substances or pose any risk to human health or the environment.**

The Consultant must outline in detail the following components of the geothermal heat pump system proposed for each of the rest area locations:

- Damage to the building or existing systems will be the responsibility of the contractor.
- The equipment will be protected from the public and shall not interfere with rest area operations.
- The system indoor equipment may be installed in the Mechanical room as space permits and as allowed by Code.
- The geothermal heat pump will tie into existing building and heating/ventilating systems according to all applicable code requirements with minimal disruption to the building operations. The system will also have bypass components and a backup high efficiency boiler in the event of a failure of the geothermal heat pump system.
- The electrical system will meet all code requirements and will be installed by a licensed electrician.
- The loopfield shall be a vertical closed system meeting all code requirements and in accordance with site and soil conditions.

- Completed shop drawings and specifications will be reviewed and approved by MDOT prior to system fabrication and installation.

DELIVERABLES

Consultant must provide Deliverables/Services and staff, and otherwise do all things necessary for or incidental to the performance of work, as set forth below:

The selected Consultant must provide all necessary permits.

The selected Consultant will provide the geothermal unit, well bores, loopfield and flow center, pipe and fittings, electrical circuits and all necessary equipment and installation services for a fully commissioned ground source, closed loop heat pump system at the following (2) rest areas:

The MDOT Rest Area, on I-94 EB near Chelsea, Washtenaw County, Michigan.

The MDOT Rest Area, on M-28 near Seney, Schoolcraft County, Michigan.

In relationship to each section below, the Consultant must deliver:

Geothermal Heat Pump (GHP) System

1. Supply a water to water geothermal unit with a 7 Ton (Seney) or 10 ton (Chelsea) output capacity. New, not refurbished.
2. Supply the make, model, nameplate, size, power rating, voltage and current capacity of the hardware as applicable.
3. Supply compressor and heat exchanger specifications.
4. Supply copies of manufacturer's data sheets for the proposed hardware and pipe.
5. Supply electrical circuit design and layout.
6. Supply a complete, freeze-protected Geothermal Loop Heat Exchanger (GLHE) to provide a ground source, closed loop system.
7. Supply a copy of the MDEQ Water Well and Pump Record for each well bore. Record must include the GPS coordinates for each well and a detailed drawing of the well field showing each well location and all piping trenches with known fixed site points.
8. Supply an outline of the recommended service maintenance schedules for the equipment, along with details and prices of replacement parts, consumables and other costs associated with operating the equipment throughout the life cycle of the system.
- 9. System and components must be compliant with the Buy American provisions of the American Recovery and Reinvestment Act (ARRA).**

Reporting

The Consultant will provide to MDOT a final report. This report will be due to MDOT within 10 days of the final acceptance of the project. This report will include, but not be limited to the following:

1. Summary of costs to install and operate the system for one year.
2. Anticipated time of return on investment in geothermal heat pump system.
3. Energy reduction and cost savings.
4. Performance which includes unusual incidents including system problems and/or failures.

The following items must be included in the proposal:

Description of Service

- Detailed description of rest area geothermal heat pump system to be provided for each site. Address all areas cited in the Work Specifications section of this RFP.
- Plan of action for initiating service at each of the selected rest areas. Address all areas cited in the Work Specifications section of this RFP.
- Plan for providing required reports and the types of reports that will be provided. Address all areas cited in the Work Specifications section of this RFP.
- Provide technical details, plans, and specifications for installation of geothermal heat pump system. This should include, but not be limited to, recommended size and placement of vertical loop field, all equipment and related items specific to the rest area
- Describe the installation schedule and methods to be used to make sure all necessary installations are performed in a timely, quality, and efficient manner with no disruption to facility users.
- Plan of action to restore all disturbed areas of the site[s].

Project Cost

System Components and work items

- Detailed cost breakdown for geothermal heat pump system to be provided for each site to include all labor and materials necessary to complete the work as described in this RFP.

Qualifications

Experience with Geothermal Heat Pump System

- Description of Consultant's prior experience with installation, maintenance, and reporting on geothermal heat pump systems. Provide samples of prior installation locations, contacts and reports.
- Identify persons in the organization that are authorized to install and maintain system in accordance with contract.
- Identify who will perform the design and installations including prior experience and qualifications.
- Provide names and qualifications of staff assigned to the provisions of the service and maintaining equipment/systems. Include resumes for each of the staff identified, and note the day to day activities that each staff will perform in the implementation and maintenance of the system.
- Indicate where the Consultant's office of primary contact will be located and staffed for this project.

Insurance

- Commercial General Liability with the following minimum coverage: \$2,000,000 General Aggregate Limit other than Products/Completed Operations \$2,000,000 Products/Completed Operations Aggregate Limit; \$1,000,000 Personal & Advertising Injury Limit \$1,000,000 Each Occurrence Limit. The Consultant must list the State of Michigan, its departments, divisions, agencies, offices, commissions, officers, employees and agents as ADDITIONAL INSUREDS on the Commercial General Liability certificate. The Consultant also agrees to provide evidence that insurance policies contain a waiver of subrogation by the insurance company.
- If a motor vehicle is used to provide services or products under this Contract, the Consultant must have vehicle liability insurance on any auto including owned, hired and non-owned vehicles used in Consultant's business for bodily injury and property damage as required by law. The Consultant must list the State of Michigan, its departments, divisions, agencies, offices, commissions, officers, employees and agents as ADDITIONAL INSUREDS on the vehicle liability certificate. The Consultant also agrees to provide evidence that insurance policies contain a waiver of subrogation by the insurance company.
- Workers' compensation coverage must be provided in accordance with applicable laws governing the employees and employers work activities in the state of the Consultant's domicile. If the applicable coverage is provided by a self-insurer, proof must be provided of approved self-insured authority by the jurisdiction of domicile. For employees working outside of the state of qualification, Consultant must provide appropriate certificates of insurance proving mandated coverage levels for the jurisdictions where the employees' activities occur. Any certificates of insurance received must also provide a list of states where the coverage is applicable. The Consultant also agrees to provide evidence that insurance policies contain a waiver of subrogation by the insurance company. This provision shall not be applicable where prohibited or limited by the laws of the jurisdiction in which the work is to be performed.
- Employers liability insurance

Other

- Overall System/Consultant performance may be conducted by MDOT to evaluate the feasibility and benefit of adding geothermal heat pump technologies to rest areas.
- Additional information to be considered pertinent but not specifically requested in the RFP.

Project Reporting Plan

Provide an example of all reports that will be prepared to provide to the state. Include at a minimum the reporting elements cited previously in this RFP.

Report will include:

- A. Summary of project implementation plan including changes/modifications
- B. Environmental offset/emissions avoidance.
- C. Estimated ROI.
- D. Accomplishments and problems encountered; noteworthy recommendations.
- E. Coordination with other agencies and organizations to complete the project.

CONSULTANT PAYMENT:

Compensation for this project shall be on a **lump sum** basis. One lump sum payment will be made once the deliverable is received and approved by the MDOT Project Manager. The MDOT Project Manager may authorize partial payment if the project is delayed due to circumstances beyond the consultant's control.

All billings for services must be directed to the Department and follow the current guidelines. The latest copy of the "Professional Engineering Service Reimbursement Guidelines for Bureau of Highways" is available on MDOT's website. This document contains instructions and forms that must be followed and used for billing; payment may be delayed or decreased if the instructions are not followed.

Payment to the Vendor for services rendered shall not exceed the maximum amount unless an increase is approved in accordance with the contract with the Vendor. Typically, billings must be submitted within 60 days after the completion of services. Refer to your contract for your specific contract terms.

GENERAL ORGANIZATION INFORMATION

REQUIRED RESPONDENT INFORMATION

Please provide the following required respondent information. Failure to respond to each requirement may disqualify the respondent from further participation in this RFP.

RESPONDENT NAME AND ADDRESS: Provide name, address, principle place of business, telephone number of legal entity with whom the contract is to be written, and the web page address.

Name and Title:		
Address:		
City, State, Zip:		
Phone: ()		Facsimile: ()
Web Page:		

LOCATION ADDRESS

Address:	
City, State, Zip:	

ORGANIZATION AND YEAR:

Please provide the legal status and business structure (corporation, partnership, sole proprietorship, etc.) of the respondent and the year the entity was established.

Status:		Year:
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RFP CONTACT:

Please provide the following information of the respondent's RFP contact:

Name and Title:		
Address:		
City, State, Zip:		
Phone: ()		Facsimile: ()
Web Page:		

CONSULTANT BID SHEET – LUMP SUM

This bid sheet is required with the response to the Request for Proposal (RFP). All entries on this page must be handwritten in ink or computer generated. Compensation for this project shall be on a **Lump Sum** basis.

Priced proposal costs will be required after selection, in accordance with MDOT’s Priced Proposal Guidelines which can be found on the MDOT web page under [Vendor/Consultant Services](#). Payment to the Consultant for services rendered shall not exceed the total bid price.

Note: MDOT reserves the right to reject any or all bids.

PROJECT DESCRIPTION:

DELIVERABLE(S)	TOTAL BID PRICE
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Deliverable(s), all tasks to be completed.

TOTAL BID PRICE: \$ _____
(All deliverables of the project)

Legal Business Name:	
Consultants Authorized Legal Signer:	
Consultant Address:	
Date:	

COST DERIVATION SHEET

This is a sample cost derivation sheet.

All entries on this page must be handwritten in ink or computer generated. This page provides for costs by payment category. This is provided as an example. Priced proposal costs will be required after selection, in accordance with the MDOT Priced Proposal Guidelines ([Guidelines](#)).

PROJECT DESCRIPTION:

Classification	Person Hours	Hourly Rate	Labor Cost
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TOTAL ESTIMATED LABOR: \$ _____

OVERHEAD: \$ _____
(Total Labor Cost x _____ %)

Facilities Capital Cost of Money: \$ _____

ESTIMATED SUBCONSULTANTS: \$ _____

ESTIMATED DIRECT EXPENSES: \$ _____
(Listed by item at estimated actual cost)

FIXED FEE: \$ _____
(Total Estimated Labor + Overhead) x 00%

TOTAL BID PRICE: \$ _____

(This bid price should be the same amount as the total bid price on page 1 of 2 of this document.)