

# Cooling & Heating Asset Management Program (CHAMP) MTA & RFP Highlights

Presented to Offerors, NNSA, M&Os

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# TOPICS

- Background
- Subcontractor Sources Sought
- Master Task Agreement (MTA) Structure
- RFP / Proposal Evaluation Process
- Proposal Preparation
- Path Forward

# Background / Key Events

| Date            | Event   |
|-----------------|---|
| 18-Dec-2021     | Lawrence Livermore National Security (LLNS) issues initial Sources Sought on the System for Award Management (SAM) Website.                   |
| 30-Mar-2022     | Convened Virtual Industry Day as part of the Sources Sought Process.  |
| 03-Aug-2022     | LLNS issues CHAMP RFP and posts Notice on SAM.GOV and our CHAMP website, with proposals due 18 November 2022.                                 |
| 17- 20-Oct-2022 | Conduct Participating Site Inspection to familiarize Offerors with diverse site requirements to facilitate your proposal preparation efforts. |
| 26 October 2022 | Amendment 1 to be issued extending the Q&A and Proposal Due Date as needed to address Q&A post- site inspection and RFP Updates.              |

# Subcontractor Sources Sought

- Subcontractor owns HVAC design & construction-managing of projects to design intent. Subcontractor not only provides capable, effective, innovative architectural-engineering (A-E) & Construction Management (CM) services, but also:
  - Partners with prestigious team of Maintenance & Operating (M&O) Contractors & DOE/NNSA personnel dedicated to enabling vital national laboratory missions with modern facilities and infrastructure.
  - Become a LLNS partner under an MTA that is multi-transactional, with a 5-year term and an estimated annual spend of \$60M/YR.
  - Satisfies diverse M&O requirements for Environment, Safety & Health (E,S&H), quality, security, budget, schedule with a streamlined, proactive performance approaches.
- Organizational structure of team is up to you, except construction must be subcontracted!

# Subcontractor Sources Sought

## Architecture & Engineering (A&E) Construction Management (CM)

Develop integrated design solutions for HVAC replacements to create safe & effective zones for great science, and national laboratory mission addressing the hot, the wet, the cold, the air, and the controls & related follow-on activities.

Subcontractor must achieve CHAMP objectives for:

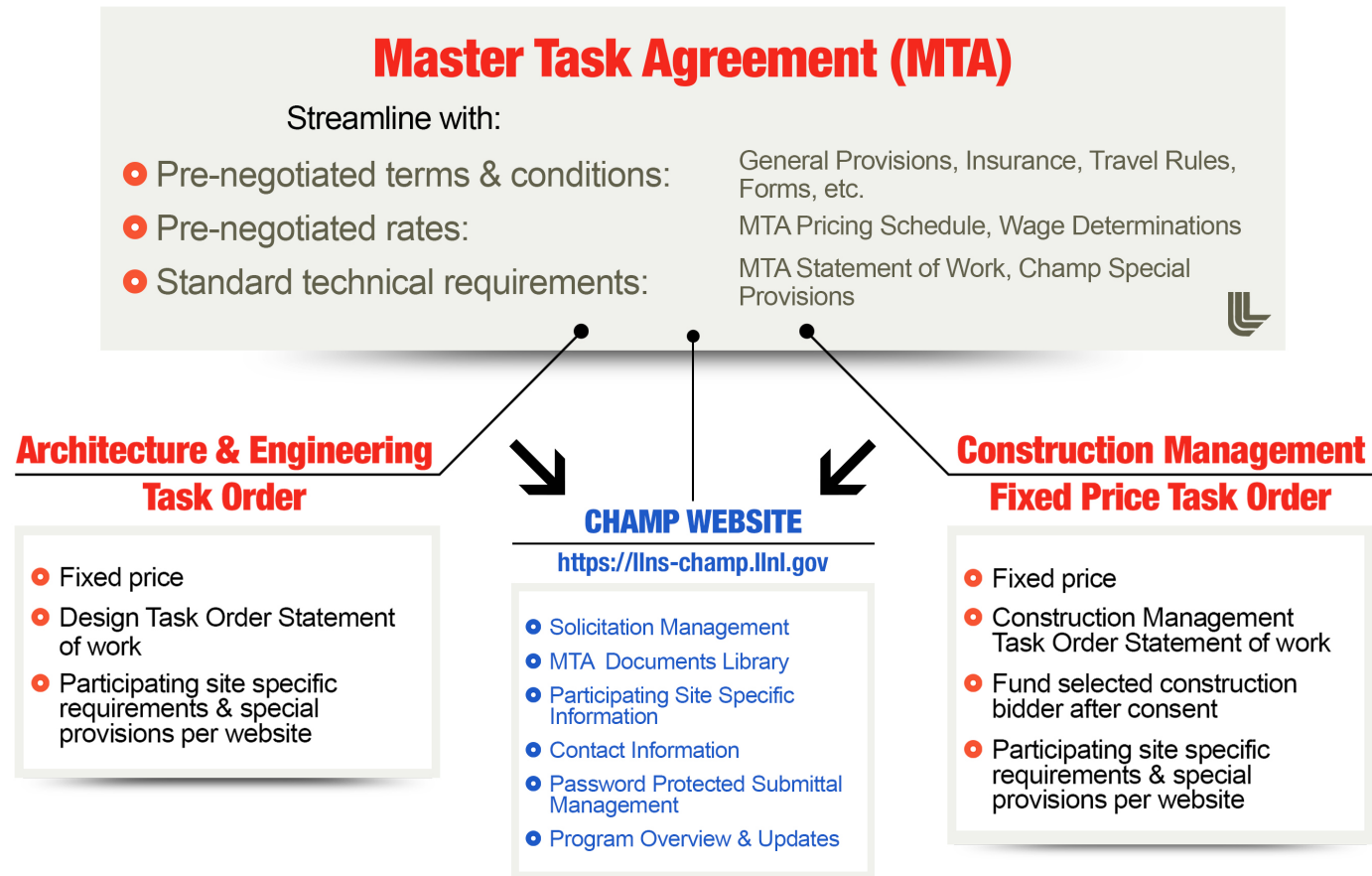
- Deferred maintenance reduction;
- Energy consumption reductions, as verified by installed instrumentation;
- Decreased operational costs.
- Compliance with regulatory requirements

Provide construction management services to execute designs such as:

- Scoping and competing build effort to local, prequalified subcontractors on fixed price, lowest priced, technically acceptable basis to the extent practical,
- Awarding the build subcontracts, subject to LLNS consent & administering them.
- Resolving technical clarifications with the builders.

# MTA Structure

## Champ MTA: Detail Design & Documentation



# MTA Structure: Streamlines terms

- Overarching Scope: The MTA contains a general Statement of Work for all types of services available under the Agreement and CHAMP Special Provisions “Division 1. “
- Special provisions standardize Special Provisions (division 1) technical requirements for A-E & construction where practical, complex-wide
- Pre-negotiated rates, terms & conditions, critical issues such as insurance, indemnification
- Right to use GSA federal supply schedules
- Consolidate, streamline requirements for E,S&H & technical submittals, reports, other deliverables

# MTA Structure: Specificity for Scoping Task Orders

- LLNS awards and administers both A-E & CM task orders, plus a Program Management Task Order to cover costs for Program Management not attributable to a single Task Order.
- Participating Sites collaborate & oversee local performance, security, safety; for A-E (review design, escort as needed); for CM (review follow-on safety & construction-related deliverables, oversee work, escort as needed).
- A-E Task orders are issued first; follow-on construction work is launched during ideal construction weather.
- Subcontractor performs A-E and construction manages its lower-tier builders



# MTA Structure: Project Specificity for A-E & CM Task Orders

- For A-E Task Orders, secure engineering scope with a well-designed scoping document that standardizes technical requirements.
- For Construction Management Task Orders, MTA structure accomplishes the following:
  - Secures construction project-specific scope with a well-designed format & matrix that layers atop the MTA Special Provisions & it allows for incorporation of site-specific requirements.
  - Secures appropriate performance, payment bonds & labor law compliance. E.G, wage determination approval & Labor Law Compliance Program (LCP) Tracker for tracking certified payrolls.
  - Secures verification of flow-down of all the above to lower-tier subcontractors through the LLNS consent process.

# RFP Proposal Evaluation Process

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CHAMP RFP leverages tradeoffs to select the responsive & responsible Offeror whose proposal contains the combination of factors offering best overall value.

LLNS will make tradeoffs by comparing differences in supplier attributes & performance features (RFP Evaluation Criteria) offered with differences in price to strike the most advantageous balance between expected performance and price!

Address the RFP Evaluation Criteria in your proposal persuasively to demonstrate you are the source we seek!

# RFP Proposal Evaluation Process – Evaluation Criteria

## Prequalification Requirements

Requested Prequalification information can be submitted prior to or updated with Offeror's proposal submittal

- **Teaming Arrangement Description**
- **Financial Data**
- **Surety**
- **Insurance**
- **Safety Records**
- **Contractor License**

## Evaluation Criteria

Based on :

- Supplier Attributes = Offerors' qualifications, capacities & capabilities as predictors of successful performance.
- Performance features = features relevant to planned use of the services & the methods for performance.

# RFP Proposal Evaluation Process – Evaluation Criteria

## CHAMP Execution Approach and Organizational Structure:

LLNS desires a capable Subcontractor that fully understands the MTA Statement of Work and provides a streamlined, proactive execution approach with a nimble organizational structure that assures successful completion of the work, compliant deliverables and customer satisfaction throughout the DOE/NNSA complex. Accordingly, the Offeror should describe its execution approach and organizational structure for performing CHAMP A-E Design and Construction Management and for securing customer satisfaction in the areas of budget, schedule and quality. When doing so, Offeror should address the extent to which the Offeror intends to self-perform or subcontract these activities and to whom.

Supplement this discussion with an organizational chart, descriptions of the roles and responsibilities of CHAMP Key Personnel and how this tightly knit organizational structure lends itself to securing customer satisfaction and leveraging capable resources to achieve optimal, cost-effective staffing levels. If LLNS considers individuals named a value-related factor, LLNS will name these personnel in its Key Personnel clause. Offeror's proposal should provide resumes for qualified resources (including lower tier subcontractors) to be leveraged in support of the execution approach for the activities below. Where practical, resumes should cross reference to their roles and contributions to the relevant examples of successful past performance provided.

- Program-managing all engineering, procurement and construction activities and being the primary technical point of contact for LLNS.
- Overseeing and executing all A-E efforts.
- Overseeing and executing all construction management efforts.
- Overseeing and executing Environment, Safety, and Health (ES&H), security and coordinating compliance with requirements at all the Participating Sites.
- Performing prime contract administration and/or lower tier subcontracting.

# RFP Proposal Evaluation Process – Evaluation Criteria (Cont'd)

## Bench Strength for Staffing Critical Activities:

LLNS desires a Subcontractor with demonstrated capabilities for assessing and evaluating facilities to formulate long term HVAC solutions. Describe availability, qualifications and capabilities supporting the activities below.

- Engineering: modelling, mechanical, electrical, structural and controls engineering resources and other relevant engineering capabilities.
- Construction Management: construction management support to oversee the efforts of lower-tier build subcontractors as defined under Special Provisions Section 01 30 00, Administrative Requirements, Paragraph 1.1. A.6.
- Safety Management: corporate-level safety management and project-specific safety management to oversee project level activities by lower-tier build subcontractors as defined under the Special Provisions Section 01 30 00, Administrative Requirements, Paragraph 1.1. A.6.
- Estimating in accordance with American Association of Cost Engineering standards and scheduling using Microsoft Project.
- Discuss how Offeror will assure availability of workforces of U.S. citizens eligible to perform professional services and craft labor at the Participating Sites.

# RFP Proposal Evaluation Process – Evaluation Criteria (Cont'd)

## Construction Subcontracting Approach and Resources:

LLNS desires a Subcontractor with the ability to secure competitive qualified sources for the diverse Participating Site locations at favorable pricing. Refer to the requirements of the MTA Statement of Work, section III C “Procurement Requirements under A-E and Construction Management Task Orders.” Offeror should describe the following:

- Its procurement system and resources.
- Its plan for strategically sourcing pools of qualified lower-tier build subcontractors, including small businesses, to support robust competitive bidding for work throughout the DOE/NNSA enterprise per the MTA Statement of Work, the CHAMP Prequalification guidelines, and the Offeror’s procurement practices.
- How Offeror will flow-down requirements to secure compliance with both MTA and Participating Site-Specific Requirements from lower-tier subcontractors.
- How Offeror intends to source and manage long lead HVAC equipment procurements.
- How you will comply with best practices outlined in the CHAMP Justification for Award document for establishing price reasonableness, particularly in the event one bid is received and that bid is not in alignment with your independent estimate.

# RFP Proposal Evaluation Process – Evaluation Criteria (Cont'd)

## Design and Construction Quality Assurance Approach and Resources:

LLNS values design and construction quality assurance and related processes such as drawing and calculation checks, configuration management, and thorough inspection. Offerors shall describe the approach and resources for execution to assure high quality design and construction deliverables. These may include, but not be limited to, work processes, staffing, and methods or evidence of verification.

Provide a copy of the quality assurance procedures or corporate manual that will be leveraged. Offerors should demonstrate a proactive, independent process, such that quality issues are identified in advance and resolved, and quality standards are met during both the design and construction phases.

# RFP Proposal Evaluation Process – Evaluation Criteria (Cont'd)

## Safety Approach and Resources:

LLNS desires subcontractors performing work at Participating Sites to have superior E,S&H records because safe performance practices are the number one priority in all operations. Per 10 CFR 851, the environment, safety and health shall be integrated into all work planning and execution. LLNS desires a Subcontractor with strong E,S&H infrastructure capable of managing numerous lower-tier build subcontractors to assure worker safety and compliance with the diverse safety requirements of the Participating Sites. The Offeror should describe its approach to worker safety and how it will address diverse E,S&H submittals and reporting requirements and resources for execution. In addition, the Offeror should provide a copy of its corporate safety and injury and illness plans and discuss how they will be leveraged to support the diverse requirements at each Participating Site.



# RFP Proposal Evaluation Process – Evaluation Criteria (Cont'd)

## Past Performance:

LLNS desires a Subcontractor capable of providing Architectural Engineering (A-E) Services and Construction Management Services as outlined above in 1.0 RFP Summary, “Cooling and Heating Asset Management Program: Background & Description.” Therefore, the Offeror should provide in its proposal written descriptions of relevant and recent examples of how it has managed similar engineering, procurement and construction efforts in the past and examples of how it has supported the diverse and dynamic priorities and requirements of multiple sites relative to quality assurance, safety and security concurrently.

When presenting the examples of past performance, the Offeror should explain their relevance and the extent to which proposed resources (including teaming subcontractors and key personnel) worked together to achieve successful outcomes, i.e., examples should be cross-referenced in the resumes furnished for the applicable key personnel. The examples of past performance may include public and private contracts. Include technical and business contacts by name, title, address, telephone number and e-mail address. In its evaluation of Offeror’s past performance, LLNS will consider input from references provided by the Offeror and other known references.

# Proposal Preparation: Technical and Pricing

- Submit technical and pricing proposals as separate electronic files via e-mail to [Pascal2@llnl.gov](mailto:Pascal2@llnl.gov) and CC to Michlig1@llnl.gov
- Technical Proposal includes all RFP information but pricing or financial statements.
- Pricing Proposal includes Offeror's Completed MTA Pricing Schedule and financial statements.
- If financial statements or other prequalification materials were submitted previously, note submittal date in proposal.

# PATH FORWARD

- Pay attention to RFP Amendments & Q&A at <https://llns-champ.llnl.gov>
- Submit proposals as instructed.
- LLNS reserves right to host Oral Presentations (finalists only)

**Good Luck & Safe Travels!!!**





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