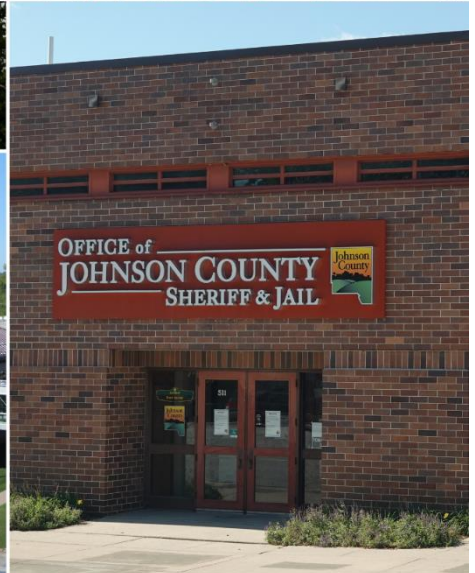




# Facilities Condition Assessment and Energy Audit RFP February 2022



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## Facilities Condition Assessment and Energy Audit RFP February 2022

Johnson County, IA will accept proposals from qualified firms interested in providing a county-wide facilities condition assessment.

### Project Overview

Johnson County is soliciting proposals to conduct detailed facility condition assessment (FCA) and analysis of its facilities, grounds, and miscellaneous structures on county owned properties, identification of current facility condition and energy conservation deficiencies, recommendation corrections for deficiencies, cost estimates for corrections, and forecasting future capital renewal cost. A list of properties to be assessed is included with this RFP.

Johnson County seeks to understand (1) the general condition of all buildings and major components; (2) the annual operation and maintenance costs for each building; and (3) the timing and cost of future building component maintenance and replacement.

### Project Objectives

- A. To review, update the existing inventory or modify systems, equipment, and infrastructure assets;
- B. To determine where, when, why and how energy is used by facilities and to identify opportunities to improve efficiency.
- C. To identify and calculate estimates for projects;
- D. To rank and prioritize all projects by priority and anticipated life cycle;
- E. To estimate the cost of and provide the list of required equipment and facilities maintenance for each building;
- F. To enhance facility planning capabilities by addressing the highest priority needs and future needs;
- G. To provide recommendations for improving facilities with the goal of 10 year capital asset budgeting, establishing a facility condition baseline for goal setting, and progress tracking.
- H. To seek expertise in potential historic facility renovations and the feasibility of those necessary upgrades to meet current space requirements.

### Scope of Work

Perform detailed inspections and assessments of facilities as specified by architectural, engineering, or other equivalent professionals such as building surveyor, to produce an accurate analysis that identifies visible and discernable components and elements requiring maintenance or other planned action. The firm must demonstrate familiarity with applicable federal, state and local codes and must include a professional cost estimator with similar work experience, local knowledge of cost rates in the area, and expertise in historic renovations. The assessment will include existing facilities at 17 sites that occupy an estimated 593,629 sf which includes a 2 level parking deck with 45,230 sf/level. Several sites have multiple buildings. An attachment to this RFP is the 2022 Johnson County Site and Building List. The County does not have an official list of sites and buildings. This list has been compiled by County Staff and includes sites, buildings and known information.

The facility condition assessment will consist of the following phases:

|          |   |
|----------|---|
| Phase I  | Facility Assessment Planning                        |
| Phase II | On-Site Facility Condition Assessment, Energy Audit |



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|           |   |
|-----------|---|
| Phase III | Analysis of Facility Conditions Assessment and Energy Audits      |
| Phase IV  | Facility Condition Assessment and Energy Audit Report Preparation |
| Phase V   | Preparation and Presentation of Strategic Plan                    |

### A. Phase I. Facility Assessment Planning

Review current asset information and establish an access protocol and scheduling. The contractor will provide a project memorandum for review and approval by the Project Leadership Team which briefly explains the purpose for the assessment, what is to be included in the assessment, and a proposed schedule.

### B. Phase II. On Site Facility Condition Assessment and Energy Audit

Conduct a detailed on-site condition assessment for each facility and infrastructure in the County's portfolio. The assessment should be structured and include all necessary information to assign an industry standard building system classification. For purposes of this RFP. The facility condition index (FCI) should be calculated as follows:

$$\text{FCI} = \frac{\text{Maintenance, Repair, and Replacement Deficiencies of the Facility (-ies)}}{\text{Current Replacement Value of the Facility (-ies)}}$$

The on-site assessment will include entering accessible crawl spaces and attic spaces. The on-site assessment will be performed using both component-level and system-level inspection methods. The assessment team will evaluate each asset to determine whether sufficient evidence is available to warrant complete replacement of the system, or if repairing only portions of the system is preferable or more cost effective.

The following minimum assessments will be accomplished:

- A. Energy Audit should be completed on each applicable facility (outline of scope is listed below).\*
- B. Identify all maintenance, repair, and replacement requirements including recommendations from the energy audit to enhance operations.
- C. Assess real plant property such as buildings, structures, and utilities and their integral components/systems. Copies of the building floor plans and maintenance history records when available will be assessable to the contractor.
- D. Perform a thorough visual assessment of all architectural, civil/structural, mechanical, electrical, fire, plumbing, and sewer components/systems of each facility. The specific in depth work identified and recommended is not included in the initial scope of work, but may be added to the scope of work at additional cost agreeable to the county.
- E. Identify and immediately report to the Facilities Director, components or situations that are considered urgent (endangering life and/property).
- F. The facility condition assessment will focus on the following property elements:
  - Building Substructure – foundations, basements, tunnels
  - Building Envelope – roof, exterior siding, curtain wall windows, exterior doors
  - Interior Construction - walls, doors, flooring, visible structural components, ceilings and ceiling systems
  - Interior Finishes - Flooring
  - Lighting - Safety
  - Health/Fire/Life Safety Systems – including emergency egress lighting



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- Disabled Accessibility - ADA requirements. Johnson County facilitated a comprehensive accessibility evaluation which was completed in 2019 by the WT Group. Individual reports are included in this RFP package.
- Heating, Ventilation, and Air Conditioning including recommended ventilation levels to address airborne virus
- Solar Arrays – located at various facilities
- Green Roof (Ambulance Service and Medical Examiner Facility)
- Plumbing Systems
- Building Electrical and Service Distribution
- Site Electrical and Service Distribution
- Fire Suppression
- Special Electrical Systems and Emergency Power
- Roadways, parking lots, sidewalks, and exterior lighting
- Water (not irrigation), sanitary, and storm sewers
- Security Systems
- Control Systems

Maintainable equipment includes but is not limited to the following types of items:

Building and HVAC Controls, Boilers, Chillers, Cooling Towers, Ducts, Lighting, Package HVAC Units, Major Exhaust Equipment, Hot Water Heaters, Air Handling Units and Controls, Commercial Overhead Doors/Sliders, Security Alarm Systems and Duress Equipment, Compressors/Refrigeration, Fire Alarms and Pumps, Pumps, Electrical Service Equipment, Elevators and lifts, and Solar Arrays

\*The Energy Audit should include the following:

- A detailed building survey of systems and operations
- Breakdown of energy source and end use
- Identification of energy-efficiency measures (EEMs) for each energy system
- Range of savings and costs for the EEMs
- Spotlight on operational discrepancies
- Outlining priorities for limited resources, next steps, and identification of EEMs requiring more thorough data collection and analysis
- Cost/savings analysis of potential energy and water savings opportunities

### **C. Phase III Analysis of Facility Condition Assessment**

The contractor shall evaluate, analyze, and provide projections for the following areas:

1. Recommend upgrades and improvements where applicable, considering efficiency and environmental improvements.
2. Identify and report all civil, structural, roof, mechanical, electrical deficiencies, and recommended upgrades and/ improvements.
3. Deficiency costs summarized by building system across facilities.
4. Deficiency costs summarized by priority across all facilities.
5. Deficiency costs summarized by category type across facilities.
6. Calculation of the Facility Condition Index (FCI) for each facility.
7. The contractor shall develop a ten-year expenditure plan, which is a schedule of all capital expenditures and actions required to maintain and repair facilities, including



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projects developed during the analysis of facility condition information, unconstrained by available funding limitations.

8. The contractor's analysis will include the calculation of the facility condition index (FCI) for each building under the County's jurisdiction. A FCI will provide a simple measure of the relative condition of a facility. The FCI is the ratio of the deficiencies (regular and deferred maintenance, repair, and replacement cost) to the current replacement value.
9. The contractor shall utilize life cycle analysis for component renewal and propose to the Project Leadership Team for review of the standards proposed to develop component renewal costs. Building components will be evaluated based on their individual life cycles, determined by an evaluation of the age. The renewal cost for the components will be computed and identified by renewal year. The contractor will report the life cycle costs at the component-level, building-level, and will provide a total for the Counties portfolio.

### Deficiency Priorities

Each deficiency and project shall include the following decision-making classifications prioritizing each action according to the critical need and classification type:

#### **Priority 1 Currently Critical**

Conditions in this category require immediate action to:

- Correct a cited safety hazard
- Stop accelerated deterioration
- Return a facility or equipment to operational status

#### **Priority 2 Potentially Critical**

Conditions in this category, if not corrected expeditiously, could deteriorate to priority 1 critical within a year. Situations within this category include:

- Intermittent operations
- Rapid deterioration
- Potential life safety hazards

#### **Priority 3 Necessary, Not Yet Critical**

Conditions in this category require appropriate attention to preclude deterioration or potential downtime and the associated damage or higher costs if deferred further.

#### **Priority 4 Recommended**

Conditions in this category include items that represent a sensible improvement to existing conditions. These are not required for the most basic function of the facility.

#### **Priority 5 Appearance**

Conditions in this category include finishes that have deteriorated and are required to maintain the required aesthetic standards.

#### **Priority 6 Does Not Meet Current Codes/Standards**

Conditions in this category include items that do not conform to existing codes, but are grandfathered (i.e. legal nonconformities) under regulations of the jurisdiction in which the facility is located. No action is required at this time, but should substantial work be undertaken in contiguous areas, certain existing conditions may require correction to comply with current code standards.



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### Capital Requirements Classification Categories

Each deficiency identified in the field assessment shall be classified in the following manner:

#### Category 1 – Security

When a system requires replacement due to a security risk or requirement.

#### Category 2 - Scheduled Maintenance

Maintenance that is planned and performed on a routine basis to preserve the condition.

#### Category 3 - Deferred Maintenance

Maintenance that was not performed when it was scheduled or is past the useful lifetime of the item resulting in immediate repair or replacement.

#### Category 4 - Capital Renewal

Planned replacement of building systems that have reached the end of useful life.

#### Category 5 - Energy & Sustainability

When the repair or replacement of equipment or systems are recommended to improve energy and sustainability performance.

### D. Phase IV Facility Condition Assessment Report

Using the data collected during the on-site facility condition assessment and analysis phase, the contractor shall provide a separate comprehensive condition assessment report for each facility.

The reports shall contain the following minimum information:

- I. Facility Inventory with summarized information.
- II. Capital requirement costs summarized by building systems.
- III. Capital requirement costs summarized by priority across facilities.
- IV. Capital Requirement costs summarized by category type across facilities.
- V. Calculation of the Facility Condition Index (FCI) for each facility.
- VI. Multi-year annual expenditure forecast for each facility.
- VII. Detailed description of building assets and equipment detailing the observed condition and deficiency cause providing recommendations to correct the deficiency.
- VIII. List of the information provided and collected such as equipment type, manufacturer, etc.
- IX. Digital photographs for each piece of equipment recommended for action. Interior photographs will be used to document critical or unusual conditions. Photographs will be used to explain and / or justify the prioritization of corrective actions.
- X. A schedule of annual forecast expenditures itemizing each deficiency against each asset classification of the total cost for the actions required to correct the deficiencies for each facility by building system.



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### E. Phase V Preparation and Presentation of Strategic Plan

The contractor shall present the assessment findings through reports, graphs, and charts to provide a visual representation of the condition assessment data. The material prepared shall be clear, detailed, and sufficient to reflect the scope of the funding needs. The contractor shall use the data collected in partnership with the energy audit findings to make up to five presentations as requested. It is anticipated that presentations be developed utilizing the five (5) Capital Requirements Classification Categories identified in Section C above.

#### Contract Term

The contract term will be effective upon the date of contract execution and be completed no later than one year or until final acceptance of the work by the Board of Supervisors.

#### Scheduling

Johnson County intends to complete assessments of as many buildings as possible during the 2022 calendar year. It is understood that all buildings may not be completed within the timing and budget available.

### Project RFP Schedule

The following is the schedule for the proposal submission and selection process (deadlines are end-of-day Central Time (CT) unless otherwise indicated):

|   |                   |
|---|-------------------|
| Date RFP issued                           | March 25, 2022    |
| Deadline for firms to submit questions    | April 11, 2022    |
| Answers posted to questions               | April 18, 2022    |
| Proposals submittal deadline 4:30 p.m. CT | May 2, 2022       |
| Interviews (if necessary)                 | May 16 – 20, 2022 |
| Recommendation to Board of Supervisors    | May 25, 2022      |

### RFQ Questions

- Questions shall be submitted to [rforsythe@johnsoncountyiowa.gov](mailto:rforsythe@johnsoncountyiowa.gov) no later than 12:00 pm, April 11, 2022. Answers to proposed questions will be posted on the County website no later than April 18, 2022.
- If necessary, an amendment to this RFP will be posted on the County website request for proposals link.

### RFP Proposal (Submittal) Requirements

1. **Submission Due Date:** Proposals shall be remitted no later than **4:30 pm on May 2, 2022**. Submissions received after that time will not be considered.
2. **Directions for Proposal Submission:**  
Interested firms must submit one (1) paper copy and one (1) digital copy (pdf format) to Ray Forsythe, Special Projects Manager, Johnson County Board of Supervisors Office, 913 S. Dubuque St., Iowa City, IA 52240; [rforsythe@johnsoncountyiowa.gov](mailto:rforsythe@johnsoncountyiowa.gov) no later than the date and time noted above. **Submittals shall consist of the following items provided in the following order:**



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- A. A transmittal letter signed by the appropriate officer of the firm offering the proposal, certifying that the submittal and all information contained therein are accurate, and that the firm does not take exception to contract considerations listed in Johnson County's General Terms and Conditions for Service Contracts/Solicitations attached to the RFP.
- B. A concise and complete description of the work to be performed, specifically addressing the deliverables and the Scope of Work. Including:
  - a. Phase I Facility Assessment Planning
  - b. Phase II On-Site Facility Condition Assessment, Energy Audit
  - c. Phase III Analysis of Facility Conditions Assessment and Energy Audits
  - d. Phase IV Facility Condition Assessment and Energy Audit Report Preparation
  - e. Phase V Preparation and Presentation of Strategic Plan
- C. A detailed work program and time schedule for the completion of all phases of the project, including milestones for periodic review of the work.
- D. A communication plan to report the progress of the data collection and status of the overall project.
- E. A minimum of three (3) client references for similar projects in size and scope successfully completed by the proposing firm or individual within the last five years. Briefly describe each project and for each reference provide up-to-date individual contact name with email and phone number. Sample reports and deliverables of previous similar projects are encouraged.
- F. Information on each of the company/services included in the project team, including a detailed description of the company, its location, and the services performed. Also, include how long the company has been performing those services and the number of people the company employs.
- G. Identify who specifically from the firm and sub-contractors will be working on the project, which portions of the scope of work and deliverables, and describe their capacity.
- H. A fee schedule for the services requested. The proposed fee schedule should include line-by-line details of expenses. Quotation of fees and compensation shall remain firm for a period of at least one (1) year from the proposal submission deadline.
- I. The proposal should include proof that the firm has adequate liability insurance.

### Additional Information

- Women- and minority-owned firms are strongly encouraged to apply.
- Johnson County is currently under contract with two architectural firms who are completing renovation plans/projects at Johnson County facilities. Below is a summary of each project which will impact the work necessary in this RFP.

### OPN Architects:

Johnson County is working on a renovation project that includes modifications to HHS, ADM, and AME and associated site improvements. This project will be conducted parallel to the Facilities Condition assessment and areas included in the Renovation project shall be excluded from the Assessment scope.





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Health and Human Services Building (HHS): The HHS project consists of an interior remodel including reconfiguration of spaces, new finishes, new ceilings, and HVAC modifications to distribution and zoning infrastructure. Exterior improvements at the NW entry include a new vestibule, canopy and plaza. Structural renovations include the addition of a freight elevator within the existing building footprint. Site improvements include ADA upgrades and site modifications to accommodate the renovation design.

Administration Building (ADM): The ADM project consists of an interior remodel including reconfiguration of spaces, new finishes, new ceilings, and HVAC modifications to distribution and zoning infrastructure. Exterior improvements on the north façade include replacing existing windows with larger glazed openings. Site improvements include ADA upgrades and site modifications to accommodate the renovation design.

Ambulance and Medical Examiner Building (AME): The AME project consists of an interior remodel including reconfiguration of spaces, new finishes, new ceilings, and HVAC modifications to distribution and zoning infrastructure on the second floor. Exterior improvements are not anticipated and Site improvements include ADA upgrades and site modifications to accommodate the renovation design.

### **Neumann Monson Architects:**

Johnson County has completed a Master Plan of the Johnson County Courthouse Constructed in 1901, the Courthouse is listed on the National Register of Historic Places. The Study assesses current conditions and presents the proposed masterplan renovations of the Johnson County Courthouse. The assessment included observations of the existing space layouts, structural systems, and mechanical, electrical, plumbing and telecommunications (MEPT) systems, security, signage and wayfinding, and site parking and landscaping. A copy of the Master Plan Report can be found at <https://johnsoncountyiowa.gov/sites/default/files/2021-09/2021%20J.C.%20Courthouse%20Masterplan%20Report.pdf> and should be considered when developing the RFP proposal.

### **Evaluation**

The Special Projects Manager and Facilities Director will evaluate proposals and make a recommendation to the Board of Supervisors. Additional County Staff may be included in the evaluation process.

The County's RFP evaluation team will consider the following items in their review:

- The qualifications of the firm and team members who will work on the project and any sub-consultants the firm intends to utilize, including the firm's and sub-consultants' knowledge and experience with government/public organizations and multiple facilities.
- The quality of similar projects that the consultant has completed. Previous experience conducting Facilities Condition Assessments in Johnson County or the State of Iowa is desired.
- Familiarity with federal, state local and other applicable building code.
- The proposed cost of the project and associated fee schedule.
- Location of the firm and any sub-contractors.
- The firm's approach towards the completion of the scope of work and team capacity.
- The consultants' ability to utilize technology and data throughout the planning process.



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- Information provided by references.
- Examples of, or working website links, to other completed plans or similar work.
- Results of interview, if conducted. (The County reserves the right to conduct interviews with individual firms if additional information is required to further assess the proposals.)  
Proposals will be additionally evaluated on the basis of the responsiveness, quality and completeness of the submission.

**No late submissions will be accepted.**

### **Contract Considerations**

#### **1. General Considerations**

The sections listed below are informational only; firms submitting proposals are hereby advised that any firm awarded a contract shall be subject to these conditions as well as other terms and conditions which will be included in a contract developed between the parties. Proposals packages are not required to contain any documents described within this section.

#### **2. Indemnification**

Any contracted executed by Johnson County is subject to the following:

“The awarded firm agrees to indemnify, defend, and save harmless, Johnson County, as well as its officers, agents and employees from any and all claims and losses to the extent caused by the negligent act, error or omission of the awarded firm resulting from the performance of this contract, except to the extent caused by the negligent acts of Johnson County or its officers, agents or employees.”

#### **3. Invoicing and Payment**

Invoices shall be paid promptly by Johnson County unless any items thereon are questioned, in which case payment will be withheld pending verification of amount claimed and the validity of the claim. Standard payment terms are Net 30 Days from receipt of properly executed invoice(s).

#### **4. Termination**

Subject to the provisions below, the contract may be terminated by either party, upon thirty (30) days' advance notice to the other party.

#### **5. Award Considerations**

Johnson County may reject any or all proposals or submittals for such reason as it may deem proper. In acceptance of proposals or submittals, Johnson County will be guided by consideration of the interests of Johnson County. Johnson County also reserves the right to negotiate further with one or more of the firms as to any features of their proposals or submittals and to accept modifications of the work and price when such action will be in the best interests of Johnson County.

The individual signing this submittal hereby declares that no person or persons other than members of his/her own organization are interested in this project or in the contract proposed to



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be taken; that it is made without any connection with any other person or persons making a proposal for the same work and is in all respects fair and without collusion or fraud; that no person acting for or employed by Johnson County is directly or indirectly interested therein, or in the supplies or works to which it relates or will receive any part of the profit or any commission therefrom in any manner which is unethical or contrary to the best interests of Johnson County.

### **6. Use of Documents**

As part of any resultant agreement, the selected firm shall grant to Johnson County a nonexclusive license to reproduce the Instruments of Service (e.g., reports and renderings), provided that Johnson County shall comply with all obligations, including prompt payment of all sums when due, under the agreement. The selected firm shall further grant a nonexclusive license permitting Johnson County to authorize other similarly credentialed design professionals to reproduce and, where permitted by law, to make changes, corrections or additions to the Instruments of Service for the purposes of implementing improvements to the project sites. The selected firm shall obtain similar nonexclusive licenses from its consultants consistent with the agreement.

### **ATTACHMENTS**

- **2022 Johnson County Site and Building List**
- **Link to Site Accessibility Evaluations prepared by WT Group**