

ENCLOSURE 3

QUALIFICATION CRITERIA

UTILITY MASTER PLAN

SOLICITATION NO. 479390

COMPANY NAME: _____

A. QUALIFICATION REQUIREMENTS

1. Required insurance requirements:

- a. Offeror can obtain policies providing insurance protection in accordance with Article 6 of the BSA Supplemental Terms and Conditions for Work by Contractors Onsite at Brookhaven National Laboratory Rev. 24.0 (April 2026).

____ Yes ____ No

2. Contractor Experience/Past Performance Requirements:

- a) Offeror has completed, as the prime contractor, at least three (3) Utility Master Plans (UMPs) or equivalent campus-wide utility infrastructure planning studies with at least one at a NYS or federal site within the past seven (7) years.
- At least two (2) of these projects are similar in size, scope, and complexity to this project at Brookhaven National Laboratory (BNL) UMP effort.
 - Comparable projects shall demonstrate experience with:
 - Multi-building campus environments
 - Multiple integrated utility systems including electrical, thermal, potable water, wastewater, chilled water, and Supervisory Control and Data Acquisition (SCADA) System
 - Evaluation of system capacity, condition, reliability, and resiliency
 - Long-term infrastructure planning supporting mission-critical operation
 - Offeror can demonstrate the projects include:
 - Existing condition assessment
 - Load forecasting and future demand analysis
 - Identification and prioritization of capital improvements
 - Development of a phased implementation plan
 - Experience evaluating interactions and dependencies between utility systems, including electrical, thermal, water, and controls infrastructure.

____ Yes ____ No

b) Offeror can demonstrate they meet one (1) of the following:

- The capability to perform the UMP with in-house staff/team across all major utility disciplines;
- The proposed team (prime and subconsultants) has completed at least two (2) UMPs or equivalent projects. The proposed team (prime and subconsultants) shall demonstrate prior experience successfully collaborating on comparable utility infrastructure or campus infrastructure projects. Experience working together on prior UMPs or related projects is preferred but not required.

____ Yes ____ No

3. Key Personnel Experience/Past Performance Requirements:

The Offeror's Key Personnel can demonstrate experience in utility master planning and campus-scale infrastructure systems and meet the following minimum requirements:

Project Executive

- Professional Engineer (PE) registered in New York State
- Minimum 15 years of relevant experience
- Experience managing at least two (2) UMPs or equivalent campus-wide utility planning efforts

Note the Project Executive shall be responsible for overall contract performance

Discipline Leads

The Offeror shall identify Discipline Leads for the following utility systems, as applicable:

- Electrical transmission and distribution
- Steam / thermal systems
- Chilled water systems
- Potable water systems
- Wastewater systems
- Controls / SCADA systems

Each Discipline Lead shall have:

- Minimum of 10 years of relevant experience in their respective discipline
- Experience in utility system analysis, planning, design, or system assessments
- Participated in at least one (1) comparable campus-scale project or industrial utility infrastructure project
- Preferred PE but not required

General Personnel Requirements

- The Offeror can collectively demonstrate capability to address all utility systems identified in the Scope of Work.

____ Yes ____ No

4. Technical Approach

The Offeror can provide a project-specific Technical Approach demonstrating the ability to perform the UMP in accordance with the Contract requirements. The Technical Approach shall demonstrate:

- A clear understanding of the project scope, including all utility systems and the requirement to evaluate system condition, capacity, reliability, and projected future demand throughout the planning horizon.
- A comprehensive methodology that includes:
 - Site investigations and field verification
 - Stakeholder coordination and engagement
 - Data collection and system condition assessments
 - Load forecasting and demand analysis
 - Gap identification and risk evaluation
 - Development of recommended projects and improvements
- An integrated approach to utility system evaluation that considers interdependencies among systems and the impacts of proposed improvements across the overall infrastructure network.
- A methodology for:
 - Prioritizing projects within individual utility systems and across multiple utility systems.
 - Developing a phased implementation strategy and sequencing plan.
 - Supporting recommendations with documented data, technical analysis, and engineering justification.
- A feasible project schedule demonstrating the Offeror's ability to meet the required project duration, milestones, and interim deliverables.
- The Quality Assurance/Quality Control (QA/QC) procedures that will be implemented to ensure technical accuracy, consistency, and completeness of all work products and deliverables.
- The ability to perform all work in compliance with:
 - Department of Energy (DOE) requirements
 - Applicable federal regulations
 - New York State codes and regulations
 - Laboratory-specific requirements and standards
- The management controls, review procedures, and compliance processes that will be implemented to ensure adherence to all applicable requirements throughout performance of the UMP.
- The Technical Approach demonstrates the Offeror's ability to coordinate with multiple institutional stakeholders, operations personnel, engineering staff, and facility users throughout the planning process.

____ Yes ____ No

B. SUBMITTALS

1. Submit information to demonstrate the offeror has the ability to obtain policies providing minimum insurance protection.
2. Submit the following Contractor experience/past performance information:
 - a. Three (3) or more similar projects completed during the last seven years to demonstrate compliance with Qualification Criteria A.2a. Indicate:
 1. Project Title
 2. Detailed Description of Work
 3. Contract Amount
 4. Duration
 5. Name, Email Address and Telephone Number of Owner or Contracting Officer

Brookhaven Science Associates will use the Subcontractor Past Performance Questionnaire (AMS-Form-008) to verify past performance. Unsatisfactory past performance may result in a determination of non-responsibility.

- b. Demonstrate compliance with the staffing requirements shown in Qualification Criteria A.2b.
3. **Submit the following Key Personnel experience/past performance information:**
 - a. Submit resume for the proposed Project Executive to demonstrate compliance with Qualification Criteria A.3. Include the following information for past projects:
 1. Project Title
 2. Contract Amount
 3. Detailed Description of Work
 4. Duration
 5. Name, Email Address and Telephone Number of Owner or Contracting Officer
 - b. Submit resumes for the proposed Discipline Leads to demonstrate compliance with Qualification Criteria A.3. Include the following information for past projects:
 1. Project Title
 2. Contract Amount
 3. Detailed Description of Work
 4. Duration
 5. Name, Email Address and Telephone Number of Owner or Contracting Officer

4. **Technical Approach**

Offeror must submit a technical approach in accordance with Qualification Criteria A.4 and the Contract requirements.

This attachment addresses the Qualification Criteria the Offeror must meet to qualify to receive an award. **Failure to acknowledge ‘Yes’ to any of the Qualification Criteria, and provide the required substantiating submittals with your offer, may result in your offer being considered non-responsive.** BSA reserves the right to accept or reject any proposal based on the Qualification Criteria requirements.

COMPANY NAME: _____

SIGNED: _____

TITLE: _____

DATE: _____