

REQUEST FOR QUALIFICATIONS

Gregory-Portland ISD

RFQ# 2223-10 Testing and Balance Services for High School HVAC Phase II

Gregory-Portland Independent School District intends to retain the services of a qualified Mechanical (HVAC) and Electrical Systems Test and Balance provider to provide Testing and Balance Services for the above-referenced project. Test and Balance firms are invited to submit a qualifications proposal based on the scope of services described below.

1.0 Background

The existing High School campus is located at 4601 Wildcat Drive, Portland, Texas 78374. The campus HVAC systems are chilled water based with a facility of approximately 247,000 square feet in size.

2.0 Scope of Work

The primary role of the successful Testing and Balance Provider is to measure and adjust water flows to meet design requirements.

Additionally, the successful Testing and Balance Provider shall actively assist the Contractor, Installer, and Design Professional in developing solutions to non-conforming work or unforeseen design conflicts. Final resolution and contract documentation will remain the responsibility of the Contractor and Design Professional.

Provide Mechanical (HVAC) and Electrical Systems TAB services as listed in the Contract Documents. The TAB Provider shall collect and tabulate system test data, make field observations and coordinate closely with other construction trades such as electrical, mechanical, temperature control and design teams.

1. Conduct a kick-off meeting with the Contractor, including installation subcontractors, to discuss the Test and Balance scope, coordination, and schedule as identified in the Test and Balance specifications.
2. Review Contractor Construction Schedule. Verify that the schedule indicates the logical system, equipment, and component installation, inspections, testing, and Test and Balance sequence required to maximize schedule efficiency.
3. Review applicable Contractor submittals concurrent with the Design Team reviews. Review requests for information and change orders for impact on Test and Balance and Owner's objectives. Provide the Owner and Design Professional with Jobsite Observation Reports after each visit.
4. Develop project-specific Test and Balance Authority Construction Checklists and Inspection Checklists for use in installation verification, testing documentation, and installation compliance.
5. Update and maintain the project Testing Matrix. Review Contractor's site-specific testing agent(s) and plan. Matrix shall include a log of system deficiencies and resolution. All system non-compliance shall be logged and resolved.
6. Participate in pre-installation meetings for materials, systems, and assemblies, as identified in the construction documents.
7. Conduct site visits during construction to observe component and system installations. Attend job-site meetings to obtain information on construction progress as requested by

Owner. Review construction meeting minutes for revisions and substitutions relating to the Contract Documents. Assist in resolving any discrepancies identified during regular site inspections. Begin site visits upon the acceptance of the proposal by the Owner after the contractor has received their Notice to Proceed. Provide Jobsite Observation reports after each visit.

8. Review and approve equipment startup reports.
9. Review and approve air and water systems Test, Adjust, and Balance reports furnished by Certified Agency.
10. Coordinate and witness systems tests performed by installing contractors. Provide recommendations for retesting and system improvements until systems operate as best as possible and as intended.

Acceptance Phase (Before Substantial Completion)

Testing and Balance during the acceptance phase shall demonstrate that the performance of the systems installed during the construction phase meets the requirements of the Contract Documents. The acceptance phase must occur before Substantial Completion. The Test and Balance Authority shall complete the following:

1. Transmit to the Contractors one (1) electronic and three (3) hard copies of Test and Balance Documentation to be inserted into the Operation and Maintenance (O&M) Manuals. Documentation shall include:
 - a. Completed testing forms
 - b. Ongoing optimization guidelines and detailed, equipment-specific maintenance recommendations.
 - c. Updated Design Summary from the design professionals.
2. Transmit one (1) electronic copy of the Testing and Balance Documentation listed above to the Owner.
3. Review the TAB process and report with Owner's operational staff, including system maintenance requirements.
4. Review Contractor's Operation and Maintenance manuals and assist with Owner training to ensure that operational staff understands how to operate and maintain systems.

Occupancy / Operations Phase

Testing and Balance during the Occupancy / Operations Phase is intended to assist the facility operating staff in identifying any defects in the installed equipment or system operation. The Test and Balance Authority shall complete the following:

1. Conduct seasonal and/or deferred systems testing, and provide completed functional test reports.
2. Submit an electronic copy of the Summary TAB Report.
3. Schedule and attend two warranty walkthroughs at month 2 and month 10 after Substantial Completion) before the end of the warranty period.

3.0 Schedule

Tentative based on product availability. Expected to begin in summer 2023 and work through 2025.

4.0 Statement of Qualifications

It is the Owner's intent that the person designated as the **Mechanical (HVAC) and Electrical Systems** Test and Balance Provider (Test and Balance Authority), and the key staff members, exhibit the following:

1. Testing and Balance Provider shall have a minimum of one or multiple of the following qualifications/certifications:
 - a. Licensed Engineer in the State of Texas
 - b. Certified Test and Balance Professional by either ASHRAE, NEBB, AABC, or others as approved by Owner.
2. Acted as the principal Test and Balance Provider for at least five similar-type projects.
3. Exhibit extensive field experience. A minimum of five full years in this type of work is required.
4. Exhibit extensive experience in operating and troubleshooting HVAC systems and associated electronic Building Automation Systems.
5. Exhibit excellent verbal and writing communication skills and be highly organized and able to work with both management and trade contractors.

5.0 Requirements

Provide Three (3) complete physical paper copies of qualifications and one electronic version via download link or USB drive. Include the following:

1. List the individual who will be the lead Testing and Balance Authority, with overall responsibility for the project.
2. Provide an organization chart indicating the proposed project team.
3. Identify third-party sub-consultants or testing agencies as applicable.
4. Provide Certificates and maintain the following insurance for the entire project duration.

Comprehensive General Liability for each occurrence and in the aggregate for bodily injury and property damage:	\$1,000,000.00
---	----------------

Automobile Liability: Owned and Rented Vehicles combined single limit and aggregate for bodily injury and property damage.	\$1,000,000.00
--	----------------

Workers' Compensation at statutory limits and Employers Liability:	\$1,000,000.00
--	----------------

Professional Liability covering negligent acts, errors, and omissions in the performance of professional services	\$1,000,000.00
---	----------------

5. Completed Conflict of Interest Questionnaire
6. Provide signed, and notarized Certificate of Filing for completed Disclosure of Interested Parties Form 1295:

Effective January 1, 2016, the Gregory-Portland Independent School District, must comply with the "Disclosure of Interest Parties", mandated by Texas HB 1295, as implemented by the Texas Ethics Commission. Briefly stated, all contracts requiring an action or vote by the governing body of the entity or agency before the contract may be signed (regardless of the dollar amount) or has a value of at least \$1 million will require the online completion of Form 1295 "Certificate of Interested Parties", per Texas Government Code Statute 2252.908. Form 1295 is also required for any and all contract amendments, extensions, or renewals. A sample copy (for illustration purposes only) of the electronic form is provided in the RFQ documents. All business entities must complete and file electronically with the Texas Ethics Commission using the online filing application.

Step 1: Business Entity completes Form 1295 in electronic format on the Texas Ethics Commission website.

https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm

Step 2: Upon receipt of a completed Interested Parties Disclosure Form, Texas Ethics Commission issues a Certification of Filing to the Business Entity and the Business Entity download, print, and sign Form 1295.

Step 3: At the time of submission to the Gregory-Portland Independent School District the Business Entity submit with their contract* (i.e.: bid, rfp, rfq, soq, etc.) the signed and notarized Form 1295, along with the Certification of Filing, to the Gregory-Portland Independent School District. Upon receipt, the Gregory-Portland Independent School District may proceed with the award and/or execution of the contract.

Step 4: Not later than the 30th day after the date the contract has been signed by all parties, the Gregory-Portland Independent School District must notify Texas Ethics Commission (in electronic format) of the receipt of (1) Form 1295, and (2) the Certification of Filing.

Step 5: Not later than the 7th business day after receipt of the above notice, Texas Ethics Commission makes the disclosure available to the public by posting the disclosure on its website.

Please visit the State of Texas Ethics Commission website,

https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm
and <https://www.ethics.state.tx.us/tec/1295-Info.htm> for more information.

7. Describe the proposed approach to managing the project.
8. Provide resumes for key staff members.
9. Briefly describe the relevant experience of the proposed team in the following areas. List each person's direct involvement in:

- a. Similar Projects.
- b. HVAC Systems Testing
- c. Electrical Lighting Systems Testing

10. Provide a list of anticipated HVAC and Electrical Lighting system tests.

11. Provide a Letter of Intent, associated resumes, cover, table of contents, required documents, and all supporting materials.

6.0 Evaluation and Award

1. Per Section 2254.003 of the Texas Government Code, the Owner will consider and evaluate the following components based on demonstrated competence and qualifications to provide the service, including:

- a. Reputation of the vendor's services (Firm experience, qualifications) **(40)**
- b. Quality of the vendor's services, including the ability to react to changing workloads and Key support personnel experience and qualifications **(25)**
- c. The extent to which the services meet the district's needs (Testing and Balance Core Competencies and Project approach & planning). **(25)**
- d. Quality of Qualification Response **(10)**

2. The Owner reserves the right to negotiate and accept any qualifications, or to reject all qualifications, and to offer to accept any qualifications subject to delete any item or group of work items from the scope of work.

3. After the firms are ranked based on demonstrated competence and qualifications, the Owner will first attempt to negotiate a contract at a fair and reasonable price with the highest ranked firm, in accordance with Professional Services Procurement Act (Government Code, Chap.2254). The Owner will furnish Construction Documents to the Commission Provider at the time of a cost proposal request. Construction Documents will be created by Stridde, Callins, and Associates, Inc.

4. The Proposer shall be prepared to attend an interview as part of the evaluation process if deemed necessary by the District. The Proposer shall bear all costs of preparing the RFQ and subsequent interviews.

Respondents' qualifications are due **no later than 2:00 pm on June 15, 2023.**

Submit qualification in person or by mail to:

Chris Casarez, Purchasing Coordinator
Gregory-Portland Independent School District
1200 Broadway Blvd.
Portland, Texas 78374

Faxed or e-mailed qualifications will *not* be accepted.

