

REQUEST FOR QUALIFICATIONS

Gregory-Portland ISD

RFQ# 2324-01 Testing and Balance Services for Early Childhood Center and Agriscience Building

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 Early Childhood Center is located at 1201 Daniel Moore, Portland, Texas 78374. The Agriscience Building is located behind the existing High School campus located at 4601 Wildcat Drive, Portland, Texas 78374.

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 2024.

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
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Automobile Liability: Owned and Rented Vehicles combined single limit and aggregate for bodily injury and property damage.	\$1,000,000.00
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Workers' Compensation at statutory limits and Employers Liability:	\$1,000,000.00
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Professional Liability covering negligent acts, errors, and omissions in the performance of professional services	\$1,000,000.00
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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 Including all attachments **(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 September 14, 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.

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

FORM CIQ

<p>This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.</p> <p>This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).</p> <p>By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.</p> <p>A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.</p>	<p>OFFICE USE ONLY</p> <p>Date Received</p>
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1 Name of vendor who has a business relationship with local governmental entity.

2 **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 **Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).**

7

Signature of vendor doing business with the governmental entity
Date

FELONY CONVICTION NOTICE

Texas Education Code, Section 44.034, Notification of Criminal History, Subsection (a) states, "a person or business entity that enters into a contract with a School District must give **advance notice** to the District if the person or owner or operator of the business entity has been convicted of a felony." The notice must include a general description of the conduct resulting in the conviction of a felony.

Subsection (b) states, "a school District may terminate a contract with a person or business entity if the District determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction." The District must compensate the person or business entity for services performed before the termination of the contact.

I, the undersigned agent for the firm named below, certify that the information concerning notification of felony conviction has been reviewed by me and the following information furnished is true to the best of my knowledge.

Vendor's Name _____

Authorized Company
Official's Name (please print) _____

A. My firm is not owned or operated by anyone who has been convicted of a felony.

Signature of Company Official _____ Date: _____

B. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony.

Name of Felon(s) _____

Details of Conviction(s) _____

Signature of Company Official _____ Date: _____

C. My firm is a publicly owned, Stock-exchange Corporation; therefore, this reporting requirement is not required.

Signature of Company Official _____ Date: _____

Suspension or Debarment Certificate

Non-Federal entities are prohibited from contracting with or making subawards under covered transactions to parties that are suspended or debarred or whose principals are suspended or debarred. Covered transactions include procurement for goods or services equal to or in excess of \$100,000.00. Contractors receiving individual awards for \$100,000.00 or more and all subrecipients must certify that the organization and its principals are not suspended or debarred.

By submitting this offer and signing this certificate, the bidder:

- Certifies that the owner/operator has not been convicted of a felony except as indicated on separate attachment to this offer, in accordance with Section 44.034, Texas Education Code, and
- Certifies that no suspension or disbarment is in place, which would preclude receiving a federally funded contract under the Federal OMB, A-102, Common Rule (_36)

Vendor Name _____

Authorized Company Official's Name _____

Signature of Company Official _____ Date _____

Vendor E-mail Address _____

Vendor Telephone Number _____