

## REQUEST FOR QUALIFICATIONS

### **Gregory-Portland ISD**

#### **RFQ# 2223-04 Commissioning Services for One or More of the following Four (4) Bond 2023 Projects**

- 1) Rebuild T.M. Clark Elementary School**
- 2) G-P High School Cafeteria Additions & Renovations, Inc. Culinary Program Expansion**
- 3) Operations & Family Resource Center Facility**
- 4) G-P High School Fine Arts Facility Upgrades, including New Band Hall**

Gregory-Portland Independent School District intends to retain the services of a qualified

Mechanical (HVAC) and Electrical Systems Commissioning provider to provide Commissioning Services for the above referenced project. Commissioning Authority firms are invited to submit a qualifications proposal based on the scope of services described below.

The scope of work for this project is for Design Phase Commissioning Plan, Construction/Acceptance and Occupancy/Operations Phase. The main purpose of the Commissioning Authority is to insure that the building and associated sub-systems are installed and functionally operating as designed and to verify that systems are in compliance with applicable IECC and ASHRAE requirements.

#### **1.0 Background**

T.M. Clark Elementary and the Operations & Family Resource Center are new locations and the High School campus located at 4601 Wildcat Drive, Portland, Texas 78374.

#### **2.0 Scope of Work**

The primary role of the successful Commissioning Authority is to develop and coordinate the execution of a quality assurance plan pertaining to the materials, mechanical and electrical systems, observe and document performance, and determine whether systems are functioning in accordance with the intent of the engineered Construction Documents.

Additionally, the successful Commissioning Authority will 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 services to perform Mechanical (HVAC) and Electrical Systems Commissioning as listed in the Contract Documents. The Commissioning Authority shall utilize the full construction documents as well as those specifically noted for Mechanical (HVAC) and Electrical Systems Commissioning which include, but are not limited to the following Specification Section(s):

Division 23 – Mechanical HVAC Systems  
Division 26 – Electrical Systems

1. In addition, the Mechanical (HVAC) and Electrical Systems Commissioning Agent (Commissioning Authority) shall complete the following tasks during the Design Phase, Construction/Acceptance and Occupancy/Operations Phase. Remove all existing Energy Recovery Units (ERV's) throughout the facility.
  - a. The existing units are either not operational or only operating in a limited, temporary fashion.
2. Remove and eliminate existing boiler systems (non-operational) which provided heating for the existing ERV units.
3. Install new outdoor air equipment to provide the ASHRAE required amount of outside air to the facility.
  - a. New equipment will utilize electric heat.
  - b. New equipment will create a positive building pressure for the facility.
4. Replace various HVAC components currently not operational on existing HVAC equipment.
5. Replace/upgrade exhaust fans throughout the facility.
6. Replace/correct exhaust hood deficiencies for the home-making/culinary kitchen
7. Consider replacement of Fan Coil Units for classrooms

## **Design Phase**

Commissioning during the Design Phase shall include a commissioning plan to be included as part of the Construction Documents that detail Construction and Acceptance phase project requirements. Commissioning plan shall meet the minimum requirements of the 2015 International Energy Conservation Code and follow ASHRAE guidelines.

## **Construction Phase**

Commissioning during the Construction Phase shall verify that the project achieves the objectives of engineered designs as expressed by the contract documents. The Commissioning Authority shall also complete the following minimum tasks:

1. Conduct a kick-off meeting with the Contractor, including installation subcontractors, to discuss commissioning scope, coordination and schedule as identified in the commissioning specifications.
2. Review Contractor Construction Schedule. Verify that schedule indicates the logical system, equipment, and component installation, inspections, testing and commissioning 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 commissioning and Owner's objectives. Provide directly to Owner and Design Professional written Jobsite Observation reports after each visit.

4. Develop project specific Commissioning Authority Construction Checklists and Inspection Checklists for use in installation verification, testing documentation and installation compliance.
5. Update and maintain project Testing Matrix. Review Contractor's site-specific testing agent(s) and plan. Matrix shall include a log of system deficiencies and with resolution. All systems 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. Provide site visits as required 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 at acceptance of proposal by the Owner as the building foundation installation is under construction. 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 are operating as best as possible and as intended.

#### **Acceptance Phase (Prior to Substantial Completion)**

Commissioning during the acceptance phase shall demonstrate the performance of the systems installed during the construction phase meet the requirements of the Contract Documents. The acceptance phase must occur prior to Substantial Completion. The Commissioning Authority shall complete the following:

1. Transmit to the Contractors one (1) electronic and three (3) hard copies of Commissioning 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 to the Owner one (1) electronic copy of Commissioning Documentation listed above.
3. Review commissioning process and report with Owner's operational staff including system maintenance requirements.
4. Review Contractors Operation and Maintenance manuals and assist with Owner training to ensure that operational staff understand how to operate and maintain systems.

#### **Occupancy / Operations Phase**

Commissioning 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 Commissioning Authority shall complete the following:

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

### **3.0 Schedule**

The High School was constructed in 2002, T.M. Clark Elementary and Operations & Family Resource Center are new Construction.

To obtain the current documents contact:

PDF copies of documents will be e-mailed to proposers at no charge. Printed copies of the documents can be obtained for a deposit of \$200.00 for each set of documents. Full deposit will be returned provided complete documents, including any addenda, are returned fully assembled and in good re-usable condition within 20 days of receipt of qualifications.

### **4.0 Statement of Qualifications**

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

1. Commissioning Authority shall have a minimum of one or multiple of the following qualifications/certifications:
  - a. Licensed Engineer in the State of Texas
  - b. Certified Commissioning Professional by either ASHRAE, NEBB, AABC, or other as approved by Owner.
2. Acted as the principal Commissioning Authority 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 the operation and troubleshooting of 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 Proposal Requirements**

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

1. List the individual who will be the lead Commissioning Authority, with overall responsibility for the project.
2. Provide an organization chart indicating 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 duration of the project.

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 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 on-line 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 purpose only) of the electronic form is provided in the RFQ documents. All business entities are required to 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](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](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 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 Letter of Proposal, resumes, cover, table of contents, required documents and all supporting materials.

## **6.0 Proposal Evaluation and Award**

1. Per Section 2254.003 of the Texas Government Code, the Owner will consider and evaluate the following proposal components on the basis of 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 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 (Commissioning Authority 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 the deletion of any item or group of items of work 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. for the High School & T.M. Clark Elementary projects. DBR Engineering Consultants for the Operations & Family Resource Center.

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 associated with preparing the RFQ and subsequent interviews.

Respondents' qualifications are due **no later than 2:00 pm on March 6, 2025.**

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><b>This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.</b></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><b>OFFICE USE ONLY</b></p> <p>Date Received</p>
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**1 Name of vendor who has a business relationship with local governmental entity.**

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**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.**

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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**

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Signature of vendor doing business with the governmental entity

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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 \_\_\_\_\_