

Request for Qualifications (Commissioning Agent)

State of Ohio Standard Forms and Documents

Administration of Project: Local Higher Education

Project Name	<u>Housing Development Plan - Phase 1</u>	Response Deadline	<u>May 29, 2013</u>	<u>4:00 p.m.</u>	local time
Project Location	<u>Athens, Ohio</u>	Project Number	<u>OHU-131015</u>		
City / County	<u>Athens / Athens</u>	Project Manager	<u>Terry Baxter-Potter</u>		
Owner	<u>Ohio University</u>	Contracting Authority	<u>Local Higher Education</u>		
No. of paper copies requested (stapled, not bound)	<u>3</u>	No. of electronic copies requested on CD (PDF)	<u>1</u>		

Submit the requested number of Statements of Qualifications (Form F110-330) directly to Terry Baxter-Potter at Ohio University Office of Design and Construction, 160 West Union Street, Athens, Ohio 45701. See Section H of this RFQ for additional submittal instructions.

Project Overview

A. Project Description

Ohio University (the "Owner") is requesting interested firms to submit proposals to provide Enhanced Commissioning Services for Phase 1 of the new construction portion of the Housing Development Project

Currently, Ohio University is working with an Architect to create the Housing Development Plan for the Project which will establish the Program of Requirements, building locations, utility strategy, budgets, schedule, and phasing for the Project.

Phase 1 of the Housing Development will be executed using a CM at Risk approach.

Phase 1: Construction of new buildings providing approximately 900 beds.

The Phase 1 construction shall consist of four new 4- story residence halls and a new 2-story student commons support building located on the University's South Green immediately east of Clippinger Hall. Each of the four residence halls will be approximately 72,000 gross square feet, and the support building will be approximately 18,700 gross square feet.

Future phases of the project include:

Phase 2: Construction of new building(s) providing approximately 640 beds.

Phase 3: Construction of new building(s) providing approximately 520 beds.

The Owner intends to pursue LEED Silver certification for all 3 Phases of the Housing Development Plan.

The scope that is described in this RFQ is preliminary and may be changed as a result of the final Sector Plan.

Professional design services have been acquired by the Contracting Authority under a separate contract.

State Prevailing Wage requirements apply to this project.

All aspects of the Project and related issues will be implemented and operated consistent with the Contracting Authority and/or Owner's policies and procedures.

B. Scope of Services

The objective of commissioning is to provide documented confirmation that a facility fulfills the functional performance requirements of the building owner, occupants and operators.

Commissioning is a systematic process of ensuring that all building systems perform interactively according to the design intent and the owner's operational needs. Commissioning during the construction of this project is intended to achieve the following specific objectives:

- Quality
- Value
- Comfort
- Energy Efficiency

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- Serviceability
- Sustainability

Commissioned systems include all energy-related systems, at a minimum:

- Heating, ventilating, air conditioning and refrigeration (HVAC&R) systems (mechanical and passive) and associated controls
- Lighting and daylighting controls
- Domestic hot water systems
- Fire Protection
- Emergency Power

The selected commissioning authority shall meet all of the requirements and provide all of the services required to meet the certification requirements of Fundamental Commissioning and Enhanced commissioning as required by LEED v3.0 written by the U.S. Green Building Council. The CxA shall provide separate pricing for Fundamental Commissioning, Enhanced Commissioning, Measurement & Verification, and Building Envelope Commissioning as described below. If any tasks or prices are contingent upon other tasks, please document it clearly in the proposal.

ENERGY AND ATMOSPHERE CREDIT EA-PR1] FUNDAMENTAL BUILDING SYSTEMS COMMISSIONING.

Provide commissioning services necessary to meet the requirements of LEED-NC Energy and Atmosphere Prerequisite EA-pr1, including:

1. Obtain Owner's Project Requirements (OPR) and Basis of Design (BOD) from owner and design Architect/Engineer of record. Review for compliance with LEED and provide comments.
2. Develop the commissioning specifications for incorporation into the design document. Specifications shall define:
 - 2.1. Contractor's commissioning responsibilities, systems to be commissioned, pre-functional checklists and functional test.
 - 2.2. Training requirements, including documentation to be provided.
 - 2.3. Contractor's responsibility to pay the commissioning authority to witness functional tests beyond one failed functional test.
 - 2.4. Contractor's responsibility to provide written response to the CxA's corrective action plans (CAP) within 15 working days.
3. Prepare separate design phase and construction phase commissioning plans including the following elements:
 - 3.1. A brief overview of the commissioning process.
 - 3.2. A list of commissioned features and systems.
 - 3.3. Identification (matrix) of primary commissioning participants and their responsibilities
 - 3.4. A description of the management, communication, and reporting of the commissioning plan.
 - 3.5. An outline of the commissioning process scope including submittal review, observation, start-up testing, training and warranty period activities.
 - 3.6. A list of expected work products.
 - 3.7. An activity schedule.
 - 3.8. A description of the rigor and scope of testing.
4. Review start-up and check-out forms provided by contractor.
5. Develop functional testing procedures for commissioned systems.
6. Conduct construction phase commissioning kick-off meeting(s) to introduce the commissioning process and to discuss standards, strategies, and target requirements of the commissioned systems. It is anticipated that two (2) construction phase kick off meetings will be required, one for the core and shell work, the other for the interior fit out work.

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7. Observe installation of each commissioned system by conducting site visits.
 - 7.1. Submit field trip report to owner and design team for review and distribution.
 - 7.2. Take photographs and document that the proper IAQ measures are being taken to protect the HVAC systems (e.g. filters over return air grilles).
 - 7.3. Maintain a deficiency log.
8. Witness functional testing of commissioned systems. Develop a corrective action plan (CAP) for each failed functional test and to address the deficiency log.
9. Develop a Commissioning Report to include: a list of each commissioned feature or system; disposition on commissioning compliance for each system; outstanding commissioning issues; future testing requirements, a list of compromises; and completed functional testing.
10. Witness opposite season functional testing. Develop a corrective action plan for each failed functional test.
11. Update Commissioning Report.

ENERGY AND ATMOSPHERE CREDIT EA-C3: ENHANCED COMMISSIONING

Provide commissioning services necessary to meet the requirements of LEED-NC Energy and Atmosphere Credit EA-c3, including:

1. Review the Architectural and Engineering design documents to verify that the OPR and the BOD are being followed, and that all commissioning requirements for the contractors are incorporated into the documents. Reviews to be provided at the following submittals:
 - 1.1 Design Development
 - 1.2 Final Owner Review (including back-check of final Construction Documents)
2. Review contractor shop drawings and equipment submittals for all commissioned systems.
3. Develop a systems manual for the commissioned systems to include: a final version of the BOD, systems single line diagrams, as-built controls diagrams and set points, schedule and procedures for retesting of commissioned systems, and schedule for calibrating sensors.
4. Facilitate and verify the training of maintenance staff meets the requirements in the contract documents. Assist the Owner in developing a training matrix to identify:
 - 4.1. Personnel to be trained
 - 4.2. Level of training required
 - 4.3. Equipment and systems for which training will be provided
5. Review building operation with O&M staff with a focus on resolution of outstanding warranty and commissioning related issues between 8-10 months after certificate of occupancy.

ENERGY AND ATMOSPHERE CREDIT EA-C5: MEASUREMENT & VERIFICATION

Provide measurement & verification services necessary to meet the requirements of LEED-NC Energy and Atmosphere Credit EA-c5, including:

1. Develop a measurement & verification plan consistent with Option D of the International Performance Measurement & Verification Protocol (IPMVP) Volume III, including providing recommendations for utility metering and sub-metering.
2. Review energy model inputs and results during design and provide comments.
3. Compare energy simulation model used for EA-c1 to actual energy consumption. Calibrate energy model by adjusting to reflect actual operating parameters.
4. Subtract energy conservation measures from baseline energy consumption.
5. Subtract baseline energy consumption from the actual energy use.
6. Develop a corrective action plan.

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- Qualifications and experience of individuals directly involved with the project.
- Proposer's previous experience (numbers of projects, sizes of projects) when working with its proposed consultants.
- Specification writing credentials and experience.
- Proximity of prospective firms to the project site.
- Proposer's apparent resources and capacity to meet the needs of this project

The selected CxA and all its consultants must have the capability to use the Internet within their normal business location(s) during normal business hours.

Interested CxA firms are required to submit the Commitment to Participate in the EDGE Business Assistance Program form in its Statement of Qualifications (SAO Form #F110-330) submitted in response to the RFQ, to indicate its intent to contract with and use EDGE-certified Business Enterprise(s), as a part of the CxA's team. The Intent to Contract and to Perform and / or waiver request letter and Demonstration of Good Faith Effort form(s) with complete documentation must be attached to the CxA's Technical Proposal. Both forms can be accessed via the OFCC website at <http://ofcc.ohio.gov> (click on Forms). The Intent to Contract and to Perform form is again required at the Fee Proposal stage

For all Statements of Qualifications, please identify the EDGE-certified Business Enterprises, by name, which will participate in the delivery of the proposed professional services solicited in the RFQ.

Prior to executing the Commissioning Agent Agreement, the selected CxA must represent and warrant that it has not provided any material assistance, as that term is defined in ORC Section 2909.33(C), to an organization that is identified by, and included on, the United States Department of State Terrorist Exclusion List and that it has truthfully answered "no" to every question on the Declaration Regarding Material Assistance/Non-Assistance to a Terrorist Organization, and that it has provided or shall provide such to the Contracting Authority and/or the Ohio Business Gateway (<https://ohiobusinessgateway.ohio.gov/OBG/Membership/Security.mvc>).

H. Submittal Instructions

Firms are required to submit the current version of Statement of Qualifications (Form F110-330) available via the OFCC website at <http://ofcc.ohio.gov>.

Paper copies of the Statement of Qualifications, if requested, should be stapled only. Do not use special bindings or coverings of any type. Cover letters and transmittals are not necessary.

Electronic submittals should be combined into one PDF file named with the project number listed on the RFQ and your firm's name. Use the "print" feature of Adobe Acrobat Professional or similar software for creating a PDF rather than using a scanner. If possible, please reduce the file size of the PDF. In Adobe Acrobat Professional, go to Advanced, then PDF Optimizer. Also, please label the CD and the CD cover with the project number and firm name.

Facsimile or e-mailed copies of the Statement of Qualifications will not be accepted.

Submit all questions regarding this RFQ in writing to Terry Baxter-Potter at baxtert@ohio.edu with the project number included in the subject line (no phone calls please). Questions will be answered and posted to the OAKS Capital Improvements (OAKS CI) website at <http://ci.oaks.ohio.gov> on a regular basis until one week before the response deadline. The name of the party submitting a question will not be included on the Q&A document.

Firms are requested to identify professional registrations, memberships and credentials including but not limited to: LEED GA, LEED AP, LEED AP+, CCCA, CCM, CCS, CDT, DBIA, and any other appropriate design and construction industry credentials. Identify that information on the resume page for individual in Block 22, Section E of the F110-330 form.

LEED Credentials: Leadership in Energy & Environmental Design (Green Building Certification Institute)

GA: Green Associate

AP: LEED AP (Legacy LEED Accredited Professional without specialty)

AP +: (see below):

LEED AP BD+C (Building Design and Construction specialty)

LEED AP ID+C (Interior Design and Construction specialty)

LEED AP O+M (Operations and Maintenance specialty)
LEED AP ND (Neighborhood Development specialty)
LEED AP Homes (Specialty for residential LEED construction)

Other Industry Credentials:

CCCA: Certified Construction Contract Administrator (CSI)

CCM: Certified Construction Manager (CMAA)

CCS: Certified Construction Specifier (CSI)

CDT: Construction Document Technologist (CSI)

DBIA: Design-Build Institute of America

Commissioning Agent Selection Rating Form

State of Ohio Standard Forms and Documents

Project Name Housing Development Plan – Phase 1 Proposer Firm _____
 Project Number OHU-131015 City, State, Zip _____

Selection Criteria		Value	Score
1. Primary CxA Firm Location, Size, and Workload (Maximum 10 points)			
a. Proximity of primary CxA firm's office where the majority of work will be performed to the principal project site, and knowledge of local conditions	Less than 100 miles from project site	4 - 5	
	100 miles to 200 miles from project site	2 - 3	
	More than 200 miles from project site	0 - 1	
b. Number of relevant licensed professionals within primary CxA firm available to perform the work (based on Part II of F110-330)	Less than 5 licensed professionals	1	
	5 to 20 licensed professionals	2	
	More than 20 licensed professionals	3	
c. Amount of fees awarded by the Contracting Authority to the primary CxA firm in the previous 24 months (exclude projects on hold)	Less than \$250,000	2	
	\$250,000 to \$500,000	1	
	More than \$500,000	0	
2. Primary CxA Qualifications (Maximum 30 points)			
a. Project Manager (e.g., education, experience, credentials, effective communication skills)	Experience / ability of project manager to manage scope / budget / schedule / quality	0 - 15	
b. Functional Testing Staff (e.g., education, experience)	Experience / ability of field representative to identify and solve issues during construction	0 - 15	
3. Key Consultant Qualifications (Maximum 20 points)			
a. Key Consultants (e.g., civil, mechanical, or electrical engineering, specialty consultants)	Experience / ability of key consultants to perform effectively and collaboratively	1 - 15	
b. Proposed EDGE-certified Consultant Participation** (fully executed Statements of Intent to Contract and Perform with relevant EDGE firms)	One additional point for every 2 percent increase in professional services over the advertised EDGE participation goal	0 - 5	
4. Overall Team Qualifications (Maximum 10 points)			
a. Previous Collaboration of the Project Team (sample projects on which a significant number of individual team members have worked together)	Less than 3 sample projects	1	
	3 to 7 sample projects	2	
	More than 7 sample projects	3	
b. LEED*** Training / Professional Accreditation (demonstrated either by the primary CxA firm or relevant consultant)	LEED*** Credentials* (Maximum 3 points)	GA	1
		AP	2
		AP+	3
c. LEED*** Registered / Certified Project Experience (demonstrated either by the primary CxA firm or relevant consultant)	LEED*** Registered Projects (RP) or LEED*** Certified Projects (CP) (Maximum 2 points)	RP	1
		CP	2
d. Team Organization (showed formal relationships between owner, contracting authority, consultants)	Clarity of responsibility / communication demonstrated by table of organization	0 - 2	
5. Overall Team Experience (Maximum 30 points)			
a. Past Performance of the Project Team (provided reference letters from sample project contacts)	Past performance as indicated by evaluations and letters of reference	0 - 10	
b. Experience with similar projects and anticipated project delivery method (e.g., Multiple-Prime, General Contracting, CM at Risk, Design-Build)	Less than 5 projects	0 - 3	
	5 to 10 projects	4 - 6	
	More than 10 projects	7 - 10	
c. Budget and Schedule Management (included data on estimate versus bid and original contract sum & time versus change orders for sample projects)	Performance in completing projects within original construction budget and schedule	0 - 5	
d. Knowledge of Ohio Capital Improvements Process (e.g., experience following the <i>OFC Manual</i> , the Standard Requirements, and ORC Chapter 153)	Less than 5 projects	0 - 1	
	5 to 10 projects	2 - 3	
	More than 10 projects	4 - 5	
* Refer to list of applicable credentials in Section H of the RFQ ** Must be comprised of professional design services consulting firm(s) and NOT the primary CxA firm *** Leadership in Energy & Environmental Design administered by the Green Building Certification Institute		Subtotal	

Notes:

Evaluator:

Name _____

Signature _____

Date _____