

**[Name of Organization]**

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Request for Qualifications

To Provide

Building Commissioning Services

For

[Identify the project if this is for a specific project. If it is to create a pool of CxP’s delete all references to a specific project.]

**[Project Name]**

**[Using Agency]**

[date]

***Application of this Form***

***This form is an RFQ for generating a prequalified pool of CxP’s for future projects or to generate a short list of prequalified Commissioning Providers for a specific project.*** *This form 1.3.2 Pt A RFQ is intended to be used in conjunction with form 1.3.2 Pt B RFP..*

*This RFQ is intended for project structure with an independent commissioning provider (CxP) who is directing all of the Cx effort and co-executing much of it with the contractor. In the case where the contractor is required to hire a “test engineer” who will be directing and executing most day-to-day commissioning tasks with oversight by the independent CxP, the responsibilities in this document should be appropriately modified.*

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# General Information and Requirements

## General Information

The \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Owner) seeks to identify third party independent providers of building commissioning services. Some firms that respond to this Request for Qualifications (RFQ), and which are determined by the Owner to be especially qualified, may be deemed eligible, and may be invited to interview and offer proposals for these services. The Owner reserves the right to reject any or all statements of qualifications or proposals, and to waive technicalities and formalities.

This RFQ is the first step in a two-step process for selecting a [pool, short list] of Building Commissioning firms.

[Select the sentence set below that applies.]

[for short list of CxP’s for a specific project] <Based on the rankings, the Owner may select up to [give number] respondents to provide price proposals for the project from an RFP and detailed scope of work and possibly to attend an interview. From those proposals, and interviews if conducted, the Owner will make a final selection for the CxP for the project.>

[or]

[for a pool of CxP’s for future projects] <Based on the rankings, the Owner will select those firms they deem appropriately qualified for performing commissioning on future projects. Selection to that list does not guarantee any future work. For specific projects, the Owner will select some or all of the pool to respond via a formal Cx RFP.>

Any clarifications or interpretations of this RFQ that materially affect or change its requirements will be formally provided to all parties who have expressed interest with the Owner. All such addenda issued by the Owner, before the qualifications are due, are considered part of the RFQ. Respondents shall acknowledge receipt of and incorporate each addendum in their qualifications.

**Owner Representative for this RFQ.** Direct correspondence for this RFQ to:

[insert name, position, address, phone number and email address]

## Project Description

[for a specific project. If qualifying a pool of CxP’s for future projects, delete the verbiage below.]

Project name & number:

Project location:

The project is: [new construction, major renovation, major addition, etc.] . The purpose for the work is [additional area, seismic, life-safety improvements, etc.] .

Project (or proposed ) name & description:

The proposed building totals \_\_\_\_\_\_\_\_\_\_\_\_\_ gross square feet; \_\_\_ stories; Class \_\_\_, [type] \_\_\_\_\_\_\_\_\_\_\_ building.

The facility is expected to be composed of \_\_\_\_% [space type—office, retail, laboratory, classrooms, etc.] ; \_\_\_\_% [space type] *,* and \_\_\_\_\_% [space type] .

The preliminary construction cost limitation is estimated to be $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and is anticipated to be allocated as follows:

Phase One: [Short description] is estimated at $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phase Two: [Short description] is estimated at $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Project Schedule and Funding

**Schedule.** To date, the Owner has [edit as appropriate] solicited the services of a [Design Professional, or Design Build Contractor] that will provide design documents to the selected project team, including the commissioning provider.

Expected design start date:

Expected construction start date:

Expected occupancy date:

Depending upon available funding and the needs of the Owner, all of the dates indicated in this section are estimates and are subject to change.

**Commissioning Project Funding.** [Describe if the Cx funding will be authorized and committed for all phases at once, or if authorization will be given by phases. Construction funding currently [has, has not] been made available for this project and the Owner makes no assurances that construction for the project will be funded. Firms should also be aware that there could be a significant delay between preconstruction and construction, depending upon the ultimate funding schedule for the project.]

**Project Description for Future Projects** [This is for a CxP pool. Delete this article if qualifying for a specific project.]

The Owner has the following types of building projects forecast in the future: [List building types and sizes that are forecasted (office, classroom, laboratories, hospitals, data centers, retail, etc.).] Systems typically included in the commissioning scope are provided below.

**CxP Engagement.** The Commissioning Provider (CxP) manages the commissioning effort beginning in [pre-design, or design] .

**Cx Contract and Independence**. The Commissioning Provider (CxP) will be hired by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and report directly to the Owner. Any contract resulting from this solicitation will be in the form of the Owner’s Services Agreement.

## RFQ Schedule of Events

[Edit and fill in dates.]

|  |  |
| --- | --- |
| 1. Owner issues public advertisement of RFQ: |  |
| 1. Requests for clarifications may be made by email by: |  |
| 1. Deadline for submission of Statements of Qualifications (by 7am the following morning, Owner’s time): |  |
| 1. Owner issues notification to finalist firms for interview and presentations: |  |
| 1. Questions or requests for clarifications may be made by finalists by email by: |  |
| 1. Interviews and presentation from finalists: |  |
| 1. Notification of award: |  |

## Attachments for this Portion of the RFQ

The following documents are attached to this RFQ and are to be considered while developing a response: [edit list below or insert any documents attached to this RFQ]

* Word file of Exhibit 1 (Cx Team)
* Word file of Exhibit 2 (Firm Experience)
* Word file of Exhibit 3 (Cx Discipline Lead Experience)
* Owner’s standard commissioning specifications (if applicable)

## Commissioning Objectives, Process and Scope

**Objectives.** The objectives of commissioning are to facilitate and provide documented confirmation that a facility fulfills the functional and performance requirements of the building Owner, occupants, and operators. Reaching this goal is facilitated through confirming the documentation of the Owner’s criteria for system function, performance, and maintainability (OPR) through confirming the project delivery documents (plans, specifications, addenda) comply with these criteria and the basis of design (BOD). Commissioning objectives are also facilitated through documenting confirmation that systems and assemblies are installed, set up and operating in compliance with the OPR, BOD and contract documents. In addition, confirming delivery of operation and maintenance (O&M) manuals and training on system operation and establishing processes for ongoing performance monitoring through commissioning further facilitate achieving the OPR.

**Commissioning Process.** The Owner desires commissioning to be in compliance with the intent of the Building Commissioning Association’s *New Construction Building Commissioning* *Best Practices* and in accordance with applicable elements of *ASHRAE Guideline 0 The Commissioning Process* and *ASHRAE Standard 202 The Commissioning Process for Buildings and Systems,* except where noted in this RFQ. The Owner also expects that commissioning will follow [list any existing Cx specifications or Owner standards that must be complied with.] Additionally, the project is seeking [LEED v (x), Green Globes, …. Insert Organization Name] certification and the commissioning process in those programs will be required. [State the level of commissioning if that applies for the program being followed, e.g., LEED Fundamental, Enhanced Cx, Option 1 (specify path 1 or 2, or Option 2 Envelope Cx, etc.]

In summary, the commissioning process and responsibilities of the CxP shall be (as applicable):

* Lead the commissioning activities in a logical, sequential and efficient manner using consistent protocols and forms, centralized documentation and clear and regular communications and consultations with all necessary parties.
* Develop a commissioning plan.
* Facilitate the development and use of the Owner’s Project Requirements (OPR).
* Review the design for commissioned systems to confirm the OPR and to facilitate commissioning.
* Provide clear commissioning specifications for the construction documents.
* Review and comment on construction submittals for compliance with commissioning needs.
* Develop construction checklists and confirm they are used properly by the Contractor.
* Provide field observation of installation, checkout and selected startups.
* Develop functional test procedures and execute tests with the contractor. Document the tests.
* Review functional tests executed and documented by others.
* Trend systems when possible with the building automation system to confirm proper operation.
* Conduct necessary commissioning meetings.
* Track issues and facilitate and confirm their resolution.
* Provide regular progress reports to the Owner.
* Review or develop operator training specifications and agendas and confirm completion of trainings.
* Review and approve the preparation of the O&M manuals.
* Provide a commissioning final report.
* Develop a Systems Manual.
* Perform Occupancy and Operations Phase tasks, including, but not limited to:
  + Perform seasonal testing.
  + At near warranty end, interview operators and building managers and assist in resolving issues.
  + Develop an ongoing Cx plan.
  + Put in place an energy performance monitoring, benchmarking and tracking protocol.

**Scope of Work and Commissioned Systems.** The scope of work, for the purposes of providing qualifications, consists of applying the above commissioning process and tasks to the systems below. A full detailed commissioning Scope of Work will be provided to the firm(s) selected through this RFQ process to provide a cost proposal.

The general systems commissioned will include the following. [Choose or indicate systems from the list or add systems to the list below, especially systems or sub-specialties that may not be common, such as data centers, vivariums, high BL class labs, etc.]

* All control systems
* Heating, ventilating and air conditioning systems (plant and distribution)
* Refrigeration systems
* Plumbing systems
* Lighting controls
* Electrical equipment
* Fire alarm
* Fire protection
* Security system
* Intercom
* Process [list, e.g., pure water, gases, fume hoods, lab processes, etc.]
* Building enclosure (envelope)

# Desired Qualifications

[Add to and edit the desired qualifications according to your specific project. Note: one recommended source of information on Commissioning Providers is the Building Commissioning Association (BCA): [www.bcxa.org](http://www.bcxa.org)]

## Commissioning Team

The Owner requires that the Commissioning Provider’s team consist of members who have sufficient commissioning expertise in each of systems being commissioned. The prime CxP firm making this offer must have a team of staff and sub-consultants that will be assigned and committed to the project, including a Lead CxP who will be the party on site coordinating the commissioning effort and managing the commissioning discipline leads. *The Owner is not as interested in the general firm and team capabilities as they are in the capabilities of the specific individuals that will be providing substantive work on their project. Only resumes and discussion of those individuals shall be included in the response to this RFQ.*

## Qualifications for the Lead CxP

The lead CxP must be highly qualified in the commissioning process and superior management, coordination and communication skills, in addition to having excellent engineering and technical skills. The Owner desires a Cx team that will provide consistency throughout the project. The lead CxP will hold that role throughout the entire project, but it is acceptable to have different design and construction experts or leads.

It is the Owner’s desire for the person designated as the Lead CxP to satisfy as many of the following requirements as possible:

1. Acted as the lead commissioning authority for at least three projects of comparable size, type and scope.
2. Extensive field experience in the operation and troubleshooting of HVAC systems and energy management control systems.
3. A minimum of five full years of commissioning experience.
4. Knowledgeable in building operation and maintenance and O&M training.
5. Demonstrated commissioning experience in all systems to be commissioned.
6. Knowledgeable in test, adjust, & balance of air and water systems.
7. Experienced in energy-efficient equipment design and control strategy optimization, energy features energy use/savings calculations.
8. Direct experience in monitoring and analyzing system operation using energy management control system trending and stand-alone data logging equipment.
9. Demonstrated experience with total building commissioning approach including building envelope, data and communication systems and other specialty systems.
10. Excellent verbal and writing communication skills. Highly organized and able to work with both management and trade contractors.
11. Experienced in writing commissioning specifications.
12. A bachelor’s degree in mechanical or electrical engineering is strongly preferred, and P.E. license is desired. However, other technical training, past commissioning, and field experience will be considered as a substitute.
13. Building Commissioning Association membership is required and certification as a BCA Certified Commissioning Professional is desired, but not required.
14. Experienced in commissioning of sustainable features (LEED, Green Globes, etc.).

## Qualifications for Discipline Leads

For each of the disciplines for which systems or assemblies are being commissioned, there shall be a commissioning lead assigned who has requisite skills and experience for commissioning design review, commissioning specification development and field verification, including having excellent written and verbal communication skills. They each shall have acted as commissioning technicians or providers for three other projects of similar complexity and size for their discipline. An individual may be discipline lead for more than one discipline.

# RFQ Response Content

The response need not be voluminous, but shall provide sufficient information to allow the Owner to evaluate the consultant’s approach, experience, staff and availability. Proof of liability insurance coverage will not be required for Step 1 of the RFQ, but will be required for finalists prior to their interview.

Limit qualifications to the forms referenced and the page limits in individual elements. The qualifications shall be submitted to the Owner Representative by email in one searchable pdf file with a hyperlinked table of contents. The proposer’s qualifications shall include and be organized in the following manner.

**Section 1 Cover Letter.** (1 page) Statement of Qualifications must be signed by an officer of the proposing firm with the authority to commit the firm, in the letter of introduction.

**Section 2 Commissioning Team.** List the team members by filling in Exhibit 1, Commissioning Team.

**Section 3 Experience.** Fill out the attached Commissioning Firm Experience form (Exhibit 2) for each firm on the team and Cx Discipline Leads Commissioning Experience on Similar Projects form (Exhibit 3) for each different discipline lead on the team.

**Section 4 Resumes.** Provide one page resumes for each team member of Exhibit 1. The resumes shall include specific information about expertise in commissioning work. The Lead CxP resume shall be up to four pages and should include a 1-3 line justification for each of the 14 desired qualifications from Section B.

**Section 5 Relevant Experience Narrative.** (2 pages) Briefly describe relevant experience of the proposer’s team in the following areas. List involvement of key team members.

1. Cx experience, including technical and management issues
2. Design review
3. O&M experience
4. Energy-efficient design and control strategy optimization
5. Troubleshooting

**Section 6 Approach.** (2 pages) Briefly describe your proposed approach to managing and executing the project expertly and efficiently for the following:

1. Site Visits. If not already specified in the Scope of Work (SOW), describe why and how many site visits you propose be made at what stages with what type of personnel.
2. Meetings. If not already specified in the SOW, describe why and how many meetings on and offsite will be made at what stages with what type of personnel.
3. Getting construction checklists filled in accurately and timely by the Contractor.
4. Ensuring that systems are actually ready for formal functional testing so testing goes smoothly.
5. Testing Support. Describe how you intend to conduct field testing of systems relative to the quantity of CxP personnel and contractor support necessary to conduct testing in a timely manner.
6. Test Equipment. Describe what test equipment you own and intend to provide to augment any required of the contractor.
7. Testing Process. Describe how you will manage requests from the contractor to test partially complete systems.
8. Safety. Describe the safety protocols that will be followed.
9. Reporting. If not already specified in the SOW, describe your proposed reporting type and frequency throughout the project.

**Section 7 Sample Work Products.** As an attachment, provide the following work products that members of the proposer’s team developed. Redact project identifying information if needed. List the team member who actually wrote the document and the projects on which they were used.

a) Six pages of a typical functional test procedure for a large air handler that a member of this team wrote.

b) Three pages (not the cover) of comments from a design review a member of this team made.

c) Four pages from a typical Commissioning Issues Log from a project of this team.

# Selection Process

## Commissioning Provider Selection

[Select the appropriate set of sentences.]

[For CxP pool for future work] <Upon completion of the evaluation and the interview process by the Selection Committee, the firms will be ranked using criteria described herein and firms formally added to the Owner’s CxP pool for potential future work. Those not selected will be notified within three days of selection. For future projects, the Owner’s project manager will review the list of pre-qualified CxP’s and based on past work with the Owner and current availability and suitability for the specific project will select a few CxP firms to provide price proposals for through a formal RFP. Final selection will be based off a combination of price, qualifications and fit for the project as identified in the RFP.>

[or]

[For CxP for specific project] <Upon completion of the evaluation and the interview process by the Selection Committee, the firms will be ranked using criteria described herein and an awardee identified. Other finalists will be notified within three days of awardee determination and will be held as alternates until an acceptable proposal is received from the awardee, upon which alternates will again be notified of the outcome. The awardee will enter into negotiations with the Owner, and after a final scope is determined provide a proposal based on Owner instructions that will include a detailed cost breakdown of a proposed fee to complete the work.>

Selection of qualifying firms will be made by a Selection Committee consisting of representatives of the Owner, and possibly other representatives designated by the Owner using the following criteria: [edit points as desired]

## Criteria for evaluation of Statements of Qualifications

* Key individuals’ experience with Cx in general 20 points
* Past experience and performance of key individual(s)   
  in performing similar projects, including references 25 points
* Expertise of the team in performing the services required   
  by the project 20 points
* Management approach 10 points
* Assignment of sufficient staff resources for a project of this size 15 points
* Work examples 10 points

## Interview / Presentation

The Owner may elect to interview Finalist firms to provide more information about their qualifications. Should that occur, interview instructions and requirements will be provided. Firms shall not address any questions, prior to the interview, to anyone other than the designated Owner Representative. Those firms not selected for interview will be notified within three days of Finalists determination.

### Exhibit 1. Commissioning Team Members Providing Significant Effort on Project

Provide a resume for each.

| **Role** | **Name** | **Firm** | **Primary Discipline** | **Cx Certific-ations & Licenses1** | **Fully Loaded Hourly Rate ($)** | **% of Total Project Hrs by This Party** |
| --- | --- | --- | --- | --- | --- | --- |
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1Commissioning provider certification(s) and professional licenses currently held.

### From previous similar projects the estimate of non-labor expenses as a percentage of the total price is: \_\_\_\_\_\_\_\_\_%.

Maximum annual escalation of proposed labor rates if any is: \_\_\_\_\_\_\_\_%.

### Exhibit 2. Commissioning Firm Experience

Fill Out A Separate Form For Each Firm On The Team

Company Name Contact Person Title

Address City State/Prov Zip/Postal Code

Office Phone Cell Phone E-Mail

**Brief Description of Business**

**Commissioning Activities**

|  |  |
| --- | --- |
| Percentage of overall business devoted to Cx services: | \_\_\_\_\_\_\_\_ % |
| How long has the firm offered Cx services: | \_\_\_\_\_\_\_\_ years |
| Average number of Cx projects performed each year (over last 8): | \_\_\_\_\_\_\_\_ projects  alsdfkj  Perasdflkjasldfjlkasdjflk |
| Size of the average commissioning project (over last 8 years): | \_\_\_\_\_\_\_\_ sf |
| Number of Cx projects over last 8 years: | New Const. Exist Bldg. |
| Office: | . \_\_\_\_\_\_\_\_\_. |
| Retail: | . \_\_\_\_\_\_\_\_\_. |
| Multi-family: | . \_\_\_\_\_\_\_\_\_. |
| Laboratory: | . \_\_\_\_\_\_\_\_\_. |
| Schools: | . \_\_\_\_\_\_\_\_\_. |
| Higher education: | . \_\_\_\_\_\_\_\_\_. |
| Industrial: | . \_\_\_\_\_\_\_\_\_. |
| Courthouses: | . \_\_\_\_\_\_\_\_\_. |
| Other (museums, prison, etc.): | . \_\_\_\_\_\_\_\_\_. |

**Systems or technologies for which firm has provided Cx services** (check all that apply)

|  |  |
| --- | --- |
| * HVAC * Building automation system * Scheduled or occupancy sensor lighting controls * Daylighting controls * Laboratory temperature and pressure control * Fume hoods * Clean room * Data center (>2,000 sf) * Electrical, emergency power | * Electrical, equipment & gear * Building enclosure * Fire/Life Safety * Plumbing and water heating * Commercial refrigeration * Security or telecommunications * Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

### Exhibit 3. Cx Discipline Leads Commissioning Experience On Similar Projects

Fill out one form for each different Cx Discipline lead (HVAC, electrical, plumbing, enclosure, etc.).   
**If a staff is lead for more than one discipline, fill out only one form.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** |  |  |  |
| **Role on Listed Project** |  |  |  |
| **Project**  (Name, Bldg Size,Type, new or existing, Year) |  |  |  |
| **Owner Contact & Reference**  (Name &Title, City, State,  Phone, email) |  |  |  |
| **Systems Commissioned by Discipline Lead** [Check those that apply, strike out those not applicable]  List participation of above named Staff below: |  Typical HVAC, air handlers, exhaust fans, fan coils, boilers, air terminal units, DDC controls   Rooftop DX units   Chillers, towers & pumps   Lab supply & exhaust valves, fume hoods   Lighting controls, occup sensors, daylighting   Elec gear (switchgear, MCC, transformers, generator, etc.)   Water heaters, sump pumps, solar, grey/rain water, irrigation, low flow fixtures   Fire alarm & protection   Security access control   Enclosure: roofing, walls, fenestration, doors, water tests, air tests   Other: |  Typical HVAC, air handlers, exhaust fans, fan coils, boilers, air terminal units, DDC controls   Rooftop DX units   Chillers, towers & pumps   Lab supply & exhaust valves, fume hoods   Lighting controls, occup sensors, daylighting   Elec gear (switchgear, MCC, transformers, generator, etc.)   Water heaters, sump pumps, solar, grey/rain water, irrigation, low flow fixtures   Fire alarm & protection   Security access control   Enclosure: roofing, walls, fenestration, doors, water tests, air tests   Other: |  Typical HVAC, air handlers, exhaust fans, fan coils, boilers, air terminal units, DDC controls   Rooftop DX units   Chillers, towers & pumps   Lab supply & exhaust valves, fume hoods   Lighting controls, occup sensors, daylighting   Elec gear (switchgear, MCC, transformers, generator, etc.)   Water heaters, sump pumps, solar, grey/rain water, irrigation, low flow fixtures   Fire alarm & protection   Security access control   Enclosure: roofing, walls, fenestration, doors, water tests, air tests   Other: |
| Performed Cx design review(s): | Y / N | Y / N | Y / N |
| Wrote commissioning specifications: | Y / N | Y / N | Y / N |
| Wrote project specific functional tests: | Y / N | Y / N | Y / N |
| Performed functional tests (hands-on): | Y / N | Y / N | Y / N |
| Performed monitored based commissioning: | Y / N | Y / N | Y / N |