

Request for Proposal (RFP) – Commissioning Services

CLIENT: Portage Public Schools
 PROJECT: 2021 Elementary Bond Project
 DATE: November 14, 2022

SUBMISSION INFORMATION

PROJECT DESCRIPTION:	Commissioning Services for Portage Public Schools 2021 Bond Project, specifically the construction of two (2) new elementary schools.
OWNER/CLIENT :	Portage Public Schools Administration Bldg. 8701 Mustang Drive Portage, MI 49002
LOCATION OF BID DOCUMENTS:	https://app.e-builder.net/public/publicLanding.aspx?QS=192687b7ae2f45a48a5365bf90a4348c
CLARIFICATIONS TO OWNER'S REPRESENTATIVE:	Doug Phillips or Ron Herron Doug.Phillips@plantemoran.com Ron.Herron@plantemoran.com
LAST DATE FOR CLARIFICATIONS:	Friday, November 18, 2022 by 4:00PM EST
PROPOSAL DUE DATE:	Monday, November 28, 2022 by 3:00PM EST *Proposals must arrive before the deadline and the Proposing Firm bears all risks of transmission failure
SUBMIT ELECTRONIC PROPOSAL TO:	Mr. Johnny Edwards Asst. Superintendent of Operations

	<p>Portage Public Schools</p> <p>jedwards@portageps.org</p> <p>*** Please email a copy of your proposal to Ronald.Herron@plantemoran.com and Doug.Phillips@plantemoran.com AFTER the proposal due date and time</p>
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PROPOSAL DETAILS

Portage Public Schools (hereafter referred to as “Owner”) has engaged Plante Moran Cresa (hereafter referred to as “PMC” or “Owner’s Representative”) to provide owner’s representation services for this project. Your firm is invited to submit a proposal for the services required in this request for proposal (RFP). This RFP is being publicly advertised and includes minimum qualifications that must be met or exceeded. This RFP includes the following attachments:

A. Project Scope

1. Project Description / Scope of Services
2. Preliminary Project Work Schedule
3. Schematic Design Narratives
4. Abbreviated Drawings

B. Contract Documents

1. Standard Form of Agreement AIA C103-2015, as modified
2. General Conditions AIA C203-2017, as modified

C. Proposal Forms

1. Proposal Form
2. Commissioning Firm Experience
3. Familial Disclosure Statement
4. Iran Disclosure Statement
5. Non-Collusive Affidavit
6. Equal Opportunity Form

This RFP does not commit Owner to award a contract or to undertake any financial obligation whatsoever with respect to the requirement referred to herein. Owner reserves the right to reject any proposal with or without cause, to not award a contract, or to award

one or more contracts. Owner further reserves the right to waive any irregularity or informality in this RFP process or any proposal. Owner reserves the right to accept or reject, without consideration, any proposal which arrives late. Owner reserves the right to request additional information from any or all firms. In addition, notice is hereby given of the possibility that award may be made without discussion of the proposal. In the event a firm's proposal is accepted by Owner and the firm asserts exceptions, special considerations, or conditions after acceptance, Owner, in its sole and absolute discretion, reserves the right to thereafter reject the proposal and award another firm. Therefore, the firms should submit their best proposal initially from both technical and cost standpoints.

A. PRE-PROPOSAL

- a. **CONFIDENTIALITY** — From the issue date of the RFP until a firm is selected and selection is announced, a prospective firm shall not communicate about the subject of the RFP or a firm's proposal with Owner, its board, or employees, except as permitted by the requests for clarifications paragraph. Your proposal and any modifications thereto shall be submitted only to the person(s) listed on the front page. Failure to comply strictly with Owner's instructions regarding the content and manner of submission of a proposal including, without limitation, disclosure of any information in the proposal or modifications thereof to any third party or other Owner's staff without the express, prior written approval of the Owner's Representative, shall result, at owner's sole discretion, in the immediate disqualification of the firm.
- b. RFP documents may be obtained at the e-Builder website created by PMC and noted on front page. Please contact Jessica Zanetti at (248) 603-5103 or via email at Jessica.Zanetti@plantemoran.com for e-Builder access instructions should you encounter any difficulties.

B. ADDENDA

Any addendum to this RFP will be issued in writing by PMC on behalf of Owner. No information or representation other than that contained in such an addendum, whether

received from an employee of Owner or other person, will be considered to have been modified or be grounds for deviation from any stipulation or requirement of this RFP.

C. PROPOSAL FORMAT

Prepare and submit one (1) electronic copy of your proposal package to the designee listed on the first page. Packages should be in 8.5" x 11" PDF format.

The following proposal format is required:

Cover Letter

Section 1 – Proposal Forms

- A. Detailed Proposal Form
- B. Commissioning Firm Experience
- C. Familial Disclosure Statements
- D. Iran Disclosure Statement
- E. Non-Collusive Affidavit
- F. Equal Opportunity Form

Section 2 – Clarifications and Exceptions

Section 3 – Additional Information

SECTION 1 – PROPOSAL

- Utilize the proposal forms provided as attachments to this RFP. Editable electronic versions of these forms may be obtained at the location indicated on front page.
- Section 1A – Detailed Proposal Form
 - Complete and attach the Detailed Proposal Form included with this RFP.
 - Proposals shall include acknowledgement that the Firm has:
 - Reviewed and understands information and data provided in this Request for Proposal
 - Please provide the Fees and Costs for the various components of the Project listed as a lump sum amount as indicated on the Proposal form. Include all personnel costs, personnel-hours, hourly rates, not-to-exceed

reimbursable expenses allowances, insurance, etc. Please include in the Proposal a chart showing hours and rates of all Project personnel, including but not limited to Field Representatives, Consultants, etc.

- Acknowledge by checking the appropriate box that by submitting the Proposal the Firm agrees with the contract terms as provided in the referenced documents.
 - Any exceptions that the Firm takes to the terms and conditions listed must be specifically referenced in your Proposal. Provide in Section 2 of your Proposal alternative language that would be acceptable to each provision.
- The prevalence of these exceptions will be considered in reviewing the Proposal and in the final selection of the Firm for the project. Proposals that do not acknowledge these agreements or do not provide specific alternative language may be rejected.
- Any exceptions to the terms and conditions contained in the Contract, or any other special consideration or conditions listed by the Firm relative to this RFP or the form Contract, will not be binding upon Owner unless expressly accepted by Owner and incorporated into the final Contract.
- Section 1B – Commissioning Firm Experience
 - Complete and attach the Commissioning Firm Experience Form included with this RFP.
- Section 1C – Familial Disclosure Statement
 - Complete and attach the Familial Disclosure Statement included with this RFP.
- Section 1D – Iran Disclosure Statement
 - Complete and attach the Iran Disclosure Statement included with this RFP.
- Section 1E – Non-Collusive Affidavit
 - Complete and attach the Non-Collusive Affidavit included with this RFP.

- Section 1F – Equal Opportunity Form
 - Complete and attach the Equal Opportunity Form included with this RFP.

SECTION 2 - CLARIFICATIONS AND EXCEPTIONS

- Please detail any clarifications, exceptions, or exclusions to this RFP (scope, schedule, fee, etc.)
- List any and all exceptions taken to the contract documents provided. For each exception, alternative language must be proposed. Owner reserves the right to reject any proposed alternative language.
- The prevalence of these exceptions will be considered in reviewing the proposal and in the final selection of the firm for the project. Proposals that do not acknowledge these agreements or do not provide specific alternative language may be rejected.

SECTION 3 – ADDITIONAL INFORMATION

- Please include any additional relevant information.

D. PROPOSAL SUBMISSION

Electronic proposals for the work as described by the RFP package will be received as noted on the front page. Please mark the subject line of all proposals with “Portage Public Schools - Proposal for Commissioning Services” and include your firm’s name as well.

E. RESPONSIVENESS

To be responsive, the proposal must set forth full, accurate, and complete information as required by this RFP and all attachments.

F. MINIMUM QUALIFICATIONS

In addition to the other requirements of this RFP, the following minimum qualifications must be met by your firm in order to submit a proposal:

- Firm has been in business for at least the last five (5) consecutive years in the field for which this bid is solicited.
- Firm is licensed to perform the required work in the State of Michigan.
- Successful completion of similar services on five (5) or more projects with five (5) or more individual facility sites.
- Firm has completed similar projects for at least five (5) Education sector clients within the last ten (10) years.

G. DESIRED QUALIFICATIONS

It is the Owner's desire for the person(s) designated as the site Commissioning Agents to satisfy as many of the following requirements as possible:

- Self-motivated, proactive, with an attention for detail and ability to complete all tasks in an efficient, organized, and professional manner with minimal oversight.
- Extensive experience in the operation and troubleshooting of HVAC systems, energy management control systems, lighting controls systems and emergency generators.
- Knowledgeable in building operation and maintenance and O&M training.
- Knowledgeable in test and balance of both air and water systems.
- Experienced in energy-efficient equipment design and control strategy optimization.
- Direct experience in monitoring and analyzing system operation using energy management control system trending and stand-alone datalogging equipment.
- Excellent verbal and writing communication skills. Highly organized and able to work with both management and trade contractors.
- Experienced in writing commissioning specifications.
- A bachelor's degree in mechanical or electrical engineering is strongly preferred, and P.E. certification is desired, however, other technical training, past commissioning, and field experience will be considered.
- Membership with the Building Commissioning Association will be considered a plus.

The required expertise for this Project will be based on the skill and experience set of the full team making the Proposal. A member of the Firm will be the designated Commissioning Agent who is the member of the team that will coordinate the commissioning activities from the technical perspective. This party may not necessarily be the team’s overall Project or contract manager. The Commissioning Agent must have significant in-building commissioning experience, including technical and management expertise on projects of similar scope. If the Commissioning Agent or Firm does not have sufficient skills to commission a specific system, the Firm shall subcontract with a qualified party to do so. Subcontractor qualifications shall be included and clearly designated in each Firm’s Proposal in response to this RFP.

H. FORM OF AGREEMENT

This is a request for proposal only. Proposals will be treated as offers to enter into contract with Owner. Owner and successful firm shall memorialize their contractual relationship and obligations using the form of contract attached to this RFP (“Contract”). The Contract contains many details regarding the services required under this RFP, as well as the terms and conditions under which the services shall be provided by the successful firm. The Contract should be reviewed carefully by each firm prior to submitting a proposal. Any exceptions to the terms and conditions contained in the Contract, or any other special considerations or conditions requested or required by the firm relative to this RFP or the form of Contract, shall be expressly and specifically enumerated by the firm and be submitted as part of its proposal, together with an explanation as to the reason such terms and conditions cannot be met by, or, in the firm’s opinion are not applicable to, the firm, provided however, that exceptions or special conditions of the firm will not be binding upon Owner unless those exceptions or special conditions are expressly accepted by Owner and incorporated into the final Contract. Following the selection of the successful firm, if any, by Owner, the Contract will be finalized by the parties. The final Contract shall be subject to the review and approval by Owner’s legal counsel.

I. DATA CONFLICTS

Where conflicts occur within this RFP, its contents, and addendum (including but not limited to the Standard Form of Agreement; general, supplemental, and other conditions; etc.) the more restrictive requirements shall govern — all in favor of the Owner.

J. UNSOLICITED TERMS AND CONDITIONS

Proposals which take exception to Owner's terms and conditions as a whole and substitute the firm's standard terms and conditions may be rejected.

K. FEES/TAXES

All proposals shall include all applicable taxes, including Social Security, unemployment, sales or use taxes, and any other taxes specifically levied on the work or on wages by local, city, state, or federal government, except real property taxes on the site. Proposals shall also include all premiums, assessments, and other like payments, charges, and costs incidental to the work covered by the contract documents.

L. PROPOSAL COSTS

Any recipient of this RFP, or any firm who chooses to respond to this RFP, is responsible for any and all costs and liabilities incurred by it, or others acting on its behalf, in (1) preparing or submitting a proposal, (2) otherwise responding to this RFP, or (3) negotiating any Contract incidental to its proposal.

M. IRREVOCABILITY OF PROPOSALS

All proposals submitted may not be withdrawn and shall be irrevocable for a minimum period of ninety (90) calendar days following the due date for receipt of proposals set forth on the front page.

N. AUTHORITY TO SIGN

Proposals must be signed by an officer of the firm who is authorized to enter into binding agreements.

O. OPENING OF PROPOSALS

At the specified location and due date stated on the first page, all submitted proposals shall be publicly opened and dated. Any interested parties may attend. No immediate decision will be rendered.

Project Details

Portage Public Schools (PPS) has secured funding for five (5) new elementary schools and formally engaged with local A/E and CM partners in 2021.

The scope of this project includes the construction of the two (2) new schools as part of the overall capital plan. The construction portion of the elementary schools was awarded to A/E and CM teams, with this scope of work awarded as follows:

Haverhill and Central Elementary Schools

A/E – Tower Pinkster/Fielding International

CM – Owen Ames Kimball (OAK)

This RFP is being issued to address the first two (2) elementary schools (Haverhill and Central) with an option for the remaining three schools upon successful commissioning of these first two facilities. The first two elementary facilities are currently in design development and represents the overall project through construction documents and the complete buildout. Provided satisfactory performance is achieved for both facilities, it would be PPS's desire to engage with the Commissioning Agent for all remaining constructed facilities as mutually agreed upon.

A. PROJECT OBJECTIVES

The objective of commissioning is to provide documented confirmation that each facility fulfills the functional and performance requirements of the building owner, occupants, and operators. To reach this goal, it is necessary for the commissioning process to establish and document the Owner's criteria for system function, performance, and maintainability (Design Intent); and to also verify and document compliance with these criteria throughout design, construction, start-up, and the initial period of operation. In addition, complete operation, and maintenance (O&M) manuals, as well as training on system operation, should be provided to the building operators to ensure the building continues to operate as intended.

The Commissioning Agent (CA) should be involved throughout the Project from pre-design through the warranty phase. The primary role of the CA during the overall Design Phases is to develop detailed commissioning specifications and review the design to ensure it meets the Owner's objectives. It is important to note that although these projects are currently in the design development phase, it is the intent to have the CA review the design documents for design intent as well as functional and performance requirements. During the Construction Phase, the

CA develops and coordinates the execution of a testing plan, which includes observing and documenting all systems' performance to ensure that the systems are functioning in accordance with the Owner's Design Intent (DI) requirements and the Contract Documents. The CA is not responsible for design or general construction scheduling, cost estimating, or construction management, but may assist with problem-solving or resolving non-conformance issues or deficiencies.

Please note that LEED certification is not being pursued for these facilities, however PPS wishes to pursue some LEED concepts within the design for Enhanced Commissioning.

For the purposes of this RFP, the following systems are intended to be Commissioned (and outlined in the Schematic Design Narrative – Attachment B.1 :

All HVAC Equipment & Systems

- Including IT Cooling Systems & De-stratification Fan System
- Building Automation Systems, Facility Management System, Controls and Sequence of Operations
- Lighting Controls – Interior & Exterior
- Fire Alarm Systems & Fire Protection Systems
- Emergency Standby Generators & Power Monitoring
- Plumbing Systems – Domestic Water & Hot Water Systems (as applicable)

Other Systems as noted

B. RFP PROJECT INFORMATION SUMMARY

BP #1 – PPS 2021 Elementary Bond Project

Overview: This project includes the commissioning of constructed new facilities including heating plant, boilers, DOAS & VRF's, AHU's, RTU's, Chillers, VAV's, BAS/FMS controls, emergency generator, toilet rooms, electrical systems, lighting and misc. MEP finishes. An abbreviated set of drawings are included for reference as Attachment B.2.

1. Two new elementary schools, 68,800 GSF and 79,180 respectively; see Schematic Design drawings and Mechanical/ Electrical Systems Narratives included for reference attachment B.1. The buildings are not prototype but

are similar in design and structure.

2. Compliance with the latest edition of the Michigan Building Code.
3. Utilize Building Information Modeling (BIM)
4. LEED Certification is not being pursued; however, some LEED concepts will be implemented.
5. Plante Moran-CRESA is the Owner's Representative; Tower Pinkster/Fielding International are the project designers, and Owen Ames Kimball is the Construction Manager for the project

Status: Summary of Project Schedules:

Central Elementary - Bidding / Award - March 2023 - May 2023
Construction - May 2023 - Summer 2025

Haverhill Elementary- Bidding/ Award – June 2023-July 2023
Construction - October 2023 - Summer 2025

Other 3 Elementary - Bidding/ Award – TBD
Construction – TBD

Notable Points: The primary work scope will take place during Spring 2023 and throughout summer 25.

See all attachments: MEP Narrative and building layouts from Tower Pinkster and Fielding International Architects and OAK's tentative planned work schedule

SCOPE OF SERVICES

ASHRAE Guideline 90.1 – 2016 (Energy Star) shall be the basis for the Commissioning Process to satisfy the 2015 Michigan Energy Code.

The CA shall be responsible for carrying out the following tasks. The responding Firm is free to suggest changes and improvements to the following task list. It is assumed by the Owner that all of these tasks will be completed by the CA, unless any proposed changes to the following task list are “clearly” highlighted and noted in the Firm’s Proposal. For this proposal, Construction Phase and Warranty Phase Services are required.

A. COMMISSIONING PLANNING AND DESIGN PHASE SERVICES

Design Development (where possible given individual project statuses)

1. Meet with the Owner, and their consultants, to establish team responsibilities, methods of approval, project procedures and schedule requirements.
2. Consult with the Owner, and their consultants, to determine its criteria and objectives regarding design quality and the Owner's budget for the Project.
3. Tour the Owner's existing facilities; review the existing mechanical / electrical systems and operational aspects that may affect the Project.
4. Assist Owner's architects and engineers in developing specifications for mechanical and electrical system components and controls.
5. Review the Design Development Documents and provide comments to the Owner and their consultants.
6. Develop commissioning requirements, sequences, phasing plans and checklists in conjunction with the Owner and their consultants.
7. Attend Design Development coordination and review meetings as required and requested to assure design solutions meet Project and Owner requirements.
8. Assist Construction Manager in developing Design Development estimates including value engineering as necessary to meet the Owner's budget.

Construction Documents

1. Assist Owner's architects and engineers in finalizing specifications for mechanical and electrical system components and controls.
2. Finalize commissioning requirements, sequences, phasing plans and checklists in conjunction with the Owner, and their consultants.
3. Attend Construction Document coordination and review meetings as required and requested to assure design solutions meet Project and Owner requirements.
4. Review the final Construction Documents and provide comments to the Owner, and their consultants.

5. Assist AE in developing final bid packages, schedules and phasing plans, scopes of work and general conditions as necessary to meet the Owner's Program.

Bidding Phase

1. Assist the Owner and its Consultants in reviewing and analyzing bids.
2. Attend pre-bid meetings, post bid interviews and assist in drafting award recommendations.

B. CONSTRUCTION PHASE, DOCUMENTATION AND TRAINING PHASE SERVICES

1. Perform the tasks and functions in the specifications ascribed to the Commissioning Agent
2. Coordinate and direct the commissioning activities in a logical, sequential and efficient manner using consistent protocols and forms, centralized documentation, clear and regular communications and consultations with all necessary parties, frequently updated timelines and schedules and technical expertise.
3. Coordinate the commissioning work with the Construction Manager and Contractors/Subcontractors, to ensure that commissioning activities are being incorporated into the Project schedule.
4. Plan and conduct commissioning meetings on a monthly basis or more frequently as required and distribute minutes.
5. Request and review additional information required to perform commissioning tasks, including O&M materials, Contractor start-up and checkout procedures. Before startup, gather and review the current control sequences and work with contractors and design engineers to adjust final testing procedures.
6. Review normal Contractor submittals applicable to systems being commissioned for compliance with commissioning needs.
7. Review requests for information, bulletins, and change orders pertaining to commissioning.
8. Write and distribute construction checklists for commissioned equipment.
9. Develop an enhanced start-up and initial systems checkout plan with Contractors for selected equipment.

10. Perform site visits on a monthly basis or more frequently as required (may be combined w/monthly Cx meetings), to observe component and system installations. Attend selected planning and job-site meetings to obtain information on construction progress. Review construction meeting minutes for revisions/substitutions relating to the commissioning process. Assist in resolving any discrepancies.
11. For terminal heating and cooling devices, a minimum of 25% must be verified for compliance with start-up and operating procedures. If consistent deficiencies are discovered additional devices may require verification. No less than 50% of the VRF systems should be tested.
12. Verify the completion of the following pre-functional tasks:
 - a. HVAC piping pressure test and flushing, sufficient to be confident that proper procedures were followed. Include testing documentation in the Commissioning Record. *CxA should be present for all duct leakage & pipe pressure testing with the reports to be included in the final commissioning documentation.*
 - b. Ductwork leakage/pressure testing and cleaning sufficient to be confident that proper procedures were followed. Include documentation in the Commissioning Record.
 - c. Document construction checklist completion by reviewing completed construction checklists and by selected site observation.
 - d. Document systems startup by reviewing start-up reports and by selected site observation.
 - e. Approve air and water systems balancing by reviewing completed reports and by selected site observation.
13. With necessary assistance and review from installing Contractors, write the functional performance test procedures for equipment and systems. This may include manual functional testing, energy management control system trending and may include stand-alone datalogger monitoring.
14. Coordinate, witness and document manual functional performance tests performed by installing Contractors. Coordinate retesting as necessary until satisfactory performance is achieved. The functional testing shall include operating the system and components through each of the written sequences of operation, and other significant modes and sequences, including startup, shutdown, unoccupied mode, manual mode,

staging, miscellaneous alarms, power failure, security alarm when impacted and interlocks with other systems or equipment. Sensors and actuators shall be calibrated during construction check listing by the installing contractors and spot-checked by the Commissioning Agent during functional testing. Analyze functional performance trend logs and monitoring data to verify performance. Tests on respective HVAC equipment shall be executed, if possible, during both the heating and cooling season. However, some overwriting of control values to simulate conditions shall be allowed. Functional testing shall be done using conventional manual methods, control system trend logs, and read-outs or stand-alone dataloggers, to provide a high level of confidence in proper system function, as deemed appropriate by the commissioning Agent and the Owner.

15. Prepare test plans for, assist with execution of, and document tests of commissioned equipment overseen by regulatory authorities and ensure that such tests meet the testing rigor desired by the Owner.
16. Maintain a master issues log and a separate record of functional testing. Report all issues as they occur directly to the Owner's Representative. Provide directly to the Owner's Representative written progress reports and test results with recommended actions.
17. Review equipment warranties to ensure that the Owner's responsibilities are clearly defined.
18. Oversee and review the training of the Owner's operating personnel.
19. Review the preparation of the O&M manuals for commissioned equipment.
20. Compile a Commissioning Record, which shall include:
 - a. A brief summary report that includes a list of participants and roles, brief building description, overview of commissioning and testing scope, and a general description of testing and verification methods. For each piece of commissioned equipment, the report should contain the disposition of the Commissioning Agent regarding the adequacy of the equipment, documentation and training meeting the contract documents in the following areas:
 - i. Equipment meeting the equipment specifications
 - ii. Equipment installation
 - iii. Functional performance and efficiency

- iv. Equipment documentation
 - v. Operator training
- b. All outstanding non-compliance items shall be specifically listed. Recommendations for improvement to equipment or operations, future actions, commissioning process changes, etc. shall also be listed. Each non-compliance issue shall be referenced to the specific functional test, inspection, trend log, etc. where the deficiency is documented.
 - c. Also included in the Commissioning Record shall be the issues log, commissioning plan, progress reports, submittal and O&M manual reviews, training record, test schedules, construction checklists, start-up reports, functional tests, and trend log analysis.
21. Compile a Systems Manual that consists of the following: Owner’s Project Requirements (by Owner); Design Narrative and Basis of Design (by Architect); Performance Metrics, if completed during design; space and use descriptions, single line drawings and schematics for major systems (by Architect); control drawings, sequences of control (by Contractor); and a table of all setpoints and implications when changing them, schedules, instructions for operation of each piece of equipment for emergencies, seasonal adjustment, startup and shutdown, instructions for energy savings operations and descriptions of the energy savings strategies in the facility, recommendations for recommissioning frequency by equipment type, energy tracking recommendations, and recommended standard trend logs with a brief description of what to look for in them (all by Commissioning Agent).
22. Review and verify air and water balancing reports for commissioned equipment.

C. WARRANTY PERIOD SERVICES

- 1. Coordinate and supervise required opposite season or deferred testing and deficiency corrections and provide the final testing documentation for the Commissioning Record and O&M manuals.
- 2. Return to the site at 11 months into the 24-month warranty period and review with facility staff the current building operation and the condition of outstanding issues related to the original and seasonal commissioning. Also interview facility staff and identify problems or concerns they have with operating the building as originally

intended. Make suggestions for improvements and for recording these changes in the O&M manuals. Identify areas that may come under warranty or under the original construction contract. Assist facility staff in developing reports and documents and requests for services to remedy outstanding problems. Provide written report addressing the items noted above.

D. ALTERNATE NO. 1

1. Enhanced Commissioning
2. Project must complete the following commissioning process (CxP) activities for mechanical, electrical, domestic hot water, and renewable energy systems and assemblies in accordance with ASHRAE Guideline 0-2005 and ASHRAE Guideline 1.1-2007 for HVAC&R systems, as they relate to energy, water, indoor environmental quality and durability.
 - Review contractor submittals
 - Include systems manual requirements in construction documents
 - Include operator and occupant training requirements in construction documents
 - Verify systems manual updates and delivery
 - Verify seasonal testing
 - Review building operations 10 months after substantial completion
 - Develop an on-going commissioning plan

E. ALTERNATE NO. 2

1. Return to the site at 23 months into the 24-month warranty period and review with facility staff the current building operation and the condition of outstanding issues related to the original and seasonal commissioning. Survey interview facility staff and identify problems or concerns they have with operating the building as originally intended. Make suggestions for improvements and for recording these changes in the O&M manuals. Identify areas that may come under warranty or under the original construction contract. Assist facility staff in developing reports and documents and requests for services to remedy outstanding problems. Provide written report addressing the items noted above.

Preliminary Project Work Schedule

Task Name	Duration	Start	Finish
Central	1146 days	Mon 1/3/22	Mon 5/25/26
Design Phase - Central & Haverhill	13 mons	Mon 1/3/22	Fri 12/30/22
Owners Rep	44 mons	Mon 3/28/22	Fri 8/8/25
Schematic Design	98 days	Fri 3/11/22	Tue 7/26/22
Schematic Budget	10 days	Wed 7/27/22	Tue 8/9/22
Design Development	98 days	Thu 7/28/22	Mon 12/12/22
Design Development Budgeting	15 days	Wed 12/14/22	Tue 1/3/23
Construction Document Phase	74 days	Wed 12/14/22	Mon 3/27/23
BID Phase	2 mons	Tue 3/28/23	Mon 5/22/23
Procurement	2 mons	Tue 5/23/23	Mon 7/17/23
Sitework	18 mons	Tue 5/9/23	Mon 9/23/24
Temporary Playground Construction	2 mons	Tue 6/27/23	Mon 8/21/23
New Building	20 mons	Tue 9/19/23	Mon 3/31/25
Punch List	15 days	Tue 4/1/25	Mon 4/21/25
FFE	2 mons	Tue 4/22/25	Mon 6/16/25
Abatement Old Central	2 mons	Tue 6/17/25	Mon 8/11/25
Moving Cost	1 day	Tue 6/17/25	Tue 6/17/25
Demolition of Building of Old Central	2 mons	Tue 8/12/25	Mon 10/6/25
Kids Move In	1 day	Tue 8/26/25	Tue 8/26/25
Sitework - Create New Parking Lot	8 mons	Tue 10/14/25	Mon 5/25/26
Haverhill	1980 days	Mon 3/28/22	Fri 10/26/29
Owners Rep	44 mons	Mon 3/28/22	Fri 8/8/25
Construction Design Phase	3.8 mons	Mon 2/13/23	Mon 5/29/23
BID Phase	2 mons	Tue 6/6/23	Mon 7/31/23
Procurement	1 mons	Tue 8/1/23	Mon 8/28/23
New Building	22 mons	Tue 10/10/23	Mon 6/16/25
Sitework	20 mons	Wed 10/11/23	Tue 4/22/25
Moving Cost	1 day	Mon 5/19/25	Mon 5/19/25
Punch List	15 days	Tue 6/17/25	Mon 7/7/25

FFE	1 mons	Tue 7/8/25	Mon 8/4/25
Kids Move In	1 day	Tue 8/26/25	Tue 8/26/25
Abatement	1 mons	Mon 6/4/29	Fri 6/29/29
Demolition of Building	1 mons	Mon 7/2/29	Fri 7/27/29
Playground Construction	2 mons	Mon 8/6/29	Fri 9/28/29
Sitework - Create New Parking Lot	3 mons	Mon 8/6/29	Fri 10/26/29

Commissioning Services Proposal Form

BIDDER: _____

BIDDER'S ADDRESS: _____

BIDDER'S MAIN CONTACT FOR PROPOSAL: _____

MAIN CONTACT'S PHONE NUMBER: _____

MAIN CONTACT'S EMAIL ADDRESS: _____

All proposals submitted may not be withdrawn and shall be irrevocable for a minimum period as defined in this RFP.

A. COST PROPOSAL

a. For Scope of Services as described and required in the RFP and AIA C105-2015 as modified:

i. Fee for Planning & Design Phase Services:

\$ _____

ii. Fee for Construction & Documentation/Training Phase Services:

\$ _____

iii. Fee for 11 Month Follow-up Warranty Services:

\$ _____

Grand Total Lump Sum Fee: \$ _____

iv. Fee for Alternate #1: Enhanced Commissioning Services

\$ _____

v. Fee for Alternate #2: 23 – Month Follow-up Warranty Services

\$ _____

b. Additional Services

Billable hourly rate schedule for additional services, which may be requested by PPS. Rate to include any mark-up for overhead and profit.

<u>Position</u>	<u>Hourly Rate</u>
Principal	\$ _____
Project Manager	\$ _____
Professional Engineer	\$ _____
Commissioning Agent	\$ _____
Field Representative	\$ _____
Draftsperson/Technician	\$ _____
Accounting	\$ _____
Clerical	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

When applicable, the hourly rates shall be fixed through 12/31/2023 and may be increased a maximum of 3% per year thereafter.

c. Reimbursables:

Provide a list of items for which you would require reimbursement and the percentage mark-up, if any, which you would add to reimbursable expenses. In

addition, please provide a not-to-exceed allowance for reimbursable expenses on this project.

Markup on reimbursables: \$

Not-to-exceed reimbursable allowance: \$

B. SUB-CONSULTANTS

a. List all anticipated sub-consultants:

CIVIL	_____
LANDSCAPING	_____
ELECTRICAL	_____
MECHANICAL	_____
PLUMBING	_____
AV	_____

In the event additional consultants are required to complete this project, please state your percentage markup, if any, for including the services of additional consultants under your primary contract: _____%

C. ADDENDA

a. This proposal includes information for the following addenda:

ADDENDA NO.	_____	DATED	_____
ADDENDA NO.	_____	DATED	_____
ADDENDA NO.	_____	DATED	_____
ADDENDA NO.	_____	DATED	_____

D. CONTRACTUAL TERMS

a. If selected as architect/engineer, I agree to the contractual terms as provided in the RFP as noted below:

AIA C105-2015 Edition, as modified

- AIA A203-2017 General Conditions, as amended
- Exceptions to amended C105-2015 and A203 -2017*

*Attach SPECIFIC proposed alternate contract language in Section 2

I have read and I understand the responsibilities required of the Commissioning Agent under the terms of this RFP and the proposed Agreement. If selected, our firm will be able to fulfill the requirements.

SIGNATURE

Dated this _____ day of _____, 20_____.

FIRM NAME: _____

BY: _____
Signature

Position/Title

_____, being duly sworn, deposes and says that the information provided herein is complete so as not to be misleading.

Subscribed and sworn before me this _____ day of _____, 20_____.

NOTARY PUBLIC: _____

MY COMMISSION EXPIRES: _____

Proposal Checklist

- Bid Proposal Form (this document)
- Commissioning Firm Experience
- Familial Disclosure Statements
- Iran Disclosure Statement
- Non-Collusive Affidavit
- Equal Opportunity Form

Commissioning Firm Form

Company Name	Contact Person	Title
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Address	City	State/Prov	Zip/Postal Code
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Telephone	Fax	E-Mail
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Commissioning Activities

Percentage of overall business devoted to commissioning _____ %
How long has the Firm offered commissioning services _____ years
Average number of commissioning projects performed _____ projects

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

- | | |
|--|--|
| <input type="checkbox"/> Pkg. or split HVAC | <input type="checkbox"/> Electrical, Emergency power |
| <input type="checkbox"/> Chiller System | <input type="checkbox"/> Envelope |
| <input type="checkbox"/> Boiler System | <input type="checkbox"/> Fire/Life Safety |
| <input type="checkbox"/> Hydronic System | <input type="checkbox"/> Plumbing |
| <input type="checkbox"/> Energy Management System | <input type="checkbox"/> Telecommunications |
| <input type="checkbox"/> Variable Frequency Drives | <input type="checkbox"/> Thermal Energy Storage |
| <input type="checkbox"/> Lighting Controls | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Daylighting | |
| <input type="checkbox"/> Electrical, general | |

Number of registered engineers on staff who have directed commissioning projects: _____

Provide a list of recent educational projects where commissioning services were performed in the last five (5) years. Include the following information for each project.

1. Project Name
2. Owner
3. Owner Contact Name and Phone Number
4. Year(s) Project Completed
5. Brief Description of the Services Performed
6. Contract Value

Familial Disclosure Affidavit

The undersigned, the owner or authorized officer of the below named firm (the “Firm”), pursuant to the familial disclosure requirement provided in the Portage Public School’s (the “School District”) request for proposals for Commissioning service, hereby represents and warrants that, except as provided below, no familial relationships exist between the owner or any employee of the Firm, and any member of the Board of Education of the School District or the Superintendent of the School District. A list of the School District’s Board of Education Members and its Superintendent may be found at <https://portageps.org/>.

LIST OF ANY FAMILIAL RELATIONSHIPS

SIGNATURE

Dated this day of , 20 .

FIRM NAME: _____

BY: _____
Signature

Position/Title

_____, being duly sworn, deposes and says that the information provided herein is complete so as not to be misleading.

Subscribed and sworn before me this _____ day of _____, 20____, in the county of _____ and the state of _____.

NOTARY PUBLIC:

MY COMMISSION EXPIRES:

Iran Disclosure Affidavit

AFFIDAVIT OF COMPLIANCE – IRAN ECONOMIC SANCTIONS ACT

MICHIGAN PUBLIC ACT NO. 517 OF 2012

The undersigned, the owner or authorized officer of the below named firm (the “Firm”), pursuant to the compliance certification requirement provided in the Portage Public School’s (the “School District”) request for proposals for Commissioning services (the “RFP”), hereby certifies, represents, and warrants that the Firm (including its officers, directors, and employees) is not an “Iran linked business” within the meaning of the Iran Economic Sanctions Act, Michigan Public Act No. 517 of 2012 (the “Act”), and that in the event Firm is awarded a contract as a result of the aforementioned RFP, the Firm will not become an “Iran linked business” at any time during the course of performing the scope of work or any services under the contract.

The Firm further acknowledges that any person who is found to have submitted a false certification is responsible for a civil penalty of not more than two hundred fifty thousand dollars (\$250,000.00) or two (2) times the amount of the contract or proposed contract for which the false certification was made, whichever is greater, the cost of the School District’s investigation, and reasonable attorney fees, in addition to the fine. Moreover, any person who submitted a false certification shall be ineligible to bid on a request for proposal for three (3) years from the date it is determined that the person has submitted the false certification.

SIGNATURE

Dated this _____ day of _____, 20_____.

FIRM NAME: _____

BY: _____

Signature

Position/Title

_____, being duly sworn, deposes and says that the information provided herein is complete so as not to be misleading.

Subscribed and sworn before me this _____ day of _____, 20____, in the county of _____ and the state of _____.

NOTARY PUBLIC:

MY COMMISSION EXPIRES:

Non-Collusive Affidavit

STATE OF MICHIGAN)

) SS

COUNTY OF _____)

_____, being duly sworn, deposes and says
that:

1. The Proposal has been arrived at by the Commissioning Agent independently and has been submitted without collusion with, and without any agreement, understanding, or planned common course of action with, any other vendor of materials, supplies, equipment, or services described in the Request for Proposal, designed to limit independent bidding or competition; and,
2. The contents of the Proposal have not been communicated by the Commissioning Agent or its employees or agents to any person not an employee or agent of the Commissioning Agent or its surety on any bond furnished with the Proposal and will not be communicated to any such person prior to the official opening of the Proposal.

Signature of Commissioning Agent

STATE OF _____)

)ss.

COUNTY OF _____)

This instrument was acknowledged before me on the _____ day of _____, 2022, by

_____.

_____, Notary Public

_____ County, _____

My Commission Expires: _____

Acting in the County of: _____

Equal Opportunity Form

It is the publicly stated policy of _____ not to discriminate against any employee, applicant for employment, contractor, or material supplier, because of race, religion, national origin, ancestry, or sex. With regard to employment, such non-discrimination includes, but is not limited to, our (my) policies of recruitment, recruitment advertising, selection for apprenticeships or other training, rates of pay, promotion, transfer, lay-off, or termination.

In all advertising for employment, subcontractors, or suppliers we (I) shall state all applicants or respondents will receive consideration without regard to race, religion, color, national origin, ancestry, or sex.

We (I) understand that any contract for Portage Public Schools shall be in consideration of our maintaining the above-mentioned non-discrimination policy.

We (I) understand that we (I) may be required to submit further information covering the race, color, and work classification for our employees and those of subcontractors to be employed on this project.

SIGNATURE

Dated this _____ day of _____, 20_____.

FIRM NAME: _____

BY: _____
Name (printed)

Signature

Position/Title