



REQUEST FOR QUALIFICATIONS

RFQ No. 2223-Bonds34

FOR

Commissioning Services

Deadline: 2:00 p.m., Wednesday, June 7, 2023

(NOTE: The time in the Purchasing Department will be used as the official time.)

Alum Rock Union Elementary School District

2930 Gay Avenue

San Jose, CA 95127

<http://www.arusd.com>

For Information Contact:

Mr. Marc Freitas

Bonds Director

2930 Gay Avenue

San Jose, CA 95127

408-928-6987

marc.freitas@arusd.org

SECTION 1: INTRODUCTION

1.1 Purpose of RFQ: Alum Rock Union Elementary School District (District) is a public school district located in the City of San Jose, Santa Clara County, California. By issuing this Request for Qualifications (“RFQ”), the District seeks Statements of Qualification (“SOQ”) from experienced entities interested in providing the commissioning (“Respondents”) for the construction of HVAC upgrades at Adelante II Academy, Russo/McEntee Academy and Millard McCollam Elementary School as needed (“Project”).

This RFQ is a part of the process for the District’s future selection and retention of commissioning services for the Project (“Services”). Timely submitted RFQ Responses will be evaluated by the District in accordance with the criteria established in this RFQ. One or more Respondents may be requested to interview with the District as part of the process.

At this time, the District requests qualifications from Respondents. Based upon information presented in the RFQ Responses, the District’s selection committee will create a pool of qualified firms that may be selected for future consideration to provide the services for the Project. Selected firms may be requested to respond to a future request for proposals for the Project, at which time they will develop a detailed scope of services, proposed fee, and schedule.

1.2 Pool of Qualified Applications and Recertification: The District will maintain a pool of qualified firms. Requests for recertification may be sent every five (5) years. Firms that do not reply to the request for recertification may be deleted from the pool of prequalified firms, at the sole discretion of the District. Additional firms may be added to the pool, at the District’s sole discretion, as the District determines the need for additional services.

District RFQ Contacts. Questions, requests to obtain a copy of this RFQ, or other communications relating to this RFQ shall be directed in writing to the District at:

Mr. Marc Freitas
Bonds Director
2930 Gay Avenue, San Jose, CA 95127
marc.freitas@arUSD.org

With a copy to:
Deborah Slivkoff, Program Manager
dslivkoff@cumming-group.com

1.3. RFQ Schedule: District reserves the right to extend schedule dates by written addenda.

EVENT	DATE
RFQ Issued	Wednesday, May 17, 2023
Deadline for Clarifications	Tuesday, May 30, 2023, 4:00 p.m.
Responses to Questions/Clarifications	Thursday, June 1, 2023, 4:00 p.m.
Deadline to Submit RFQ Response	Wednesday, June 7, 2023, 2:00 p.m.
Interviews, if any	Week of June 12, 2023

- 1.4. District Modifications to RFQ.** The District expressly reserves the right to modify any portion of this RFQ prior to the submission deadline, including without limitation, the cancellation of this RFQ. Modifications, if any, made by the District to the RFQ will be in writing; potential Respondents who have obtained this RFQ from the District prior to any such modifications will be issued modifications to the RFQ by written addenda.
- 1.5. No Oral Clarifications/Modifications.** The District will not provide any oral clarifications or modifications to the RFQ or the requirements hereof; no employee, officer, agent, or representative of the District is authorized to provide oral clarifications or modifications to the RFQ. No Respondent shall rely on any oral clarification or modification to the RFQ.
- 1.6. Errors/Discrepancies/Clarifications to RFQ.** If a Respondent encounters errors or discrepancies in this RFQ or portions hereof, the Respondent shall immediately notify the District of such error or discrepancy. Any Respondent seeking clarification of any portion of this RFQ shall submit the requested clarification in writing to the District Contact Representatives designated in this RFQ. Responses of the District to any requested clarification will be in writing; if in the sole judgment of the District, any clarification response affects the RFQ or other Respondents, the District will issue the clarification response by a written addendum distributed to all potential Respondents who have theretofore obtained this RFQ from the District. All requests for clarification of this RFQ must be submitted and received by the District no later than the Deadline for Clarifications specified in the RFQ Schedule; the District will not respond to clarification requests submitted thereafter.
- 1.7. Restrictions on Lobbying and Contacts.** From the period beginning on the date of the issuance of this RFQ and ending on the date of the award of the contract, no person, or entity responding to this RFQ, nor any officer, employee, representative, agent, or consultant representing such a person or entity shall contact through any means or engage in any discussion regarding this RFQ, the evaluation or selection process or the award of the contract(s) with any member of the District's Board of Trustees, Committee members, any member of the Citizens' Oversight Committee, or with any employee of the District except for clarifications and questions procedures as described in this RFQ. Any such contact shall be grounds for the disqualification of the firm responding to this RFQ.
- 1.8. Limitations.** This RFQ is neither a formal request for bids, nor an offer by the District to contract with any party responding to this RFQ. The District reserves the right to add additional prequalified respondents for consideration after distribution of this RFQ if it is found to be in the best interest of the District. The award of the contract pursuant to this RFQ, if at all, is at the sole discretion of the District.

The District makes no representation that participation in the RFQ process will lead to an award of contract or any consideration whatsoever. The District shall in no event be responsible for the cost of preparing any responses to this RFQ.

- 1.9. Public Records.** Except for materials containing Trade Secrets (as defined in California Civil Code §3426.1) and specifically marked "Proprietary" at the time of submittal, and that are specifically requested to be returned, SOQs and all materials submitted in response to this RFQ are deemed property of the District and public records subject to disclosure, pursuant to the California Public Records Act. Vague designations and/or blanket statements regarding entire pages or

documents are insufficient and will not bind the District to protect the designated matter from disclosure. The District may reject for non-responsiveness the RFQ Response that indiscriminately or vaguely notes materials are “Trade Secret” or “Confidential” or “Proprietary” and exempt from disclosure as a public record.

Pursuant to *Michaelis, Montanari, & Johnson v. Superior Court* (2006) 38 Cal.4th 1065, RFQ Responses shall be held confidential by the District and shall not be subject to disclosure under the California Public Records Act until after either: (1) the District and the successful respondent have completed negotiations and entered into an agreement, or (2) the District has rejected all responses.

By submitting a response to this RFQ, Respondent agrees the District shall not be liable to Respondent for the disclosure of RFQ Responses, or portions thereof, deemed to be disclosable public records pursuant to the California Public Records Act, or by an order of a court of competent jurisdiction, or which occurs through inadvertence, mistake, or negligence on the part of the District or its agents or representatives. If the District is required to defend or otherwise respond to any action or proceeding wherein request is made for the disclosure of the contents of any portion of a RFQ Response deemed exempt from disclosure hereunder, by submitting a response to this RFQ, each Respondent agrees to defend, indemnify, and hold harmless the District in any action or proceeding from and against any liability, including without limitation attorneys’ fees arising therefrom. The party submitting materials sought by any other party shall be solely responsible for the cost and defense of the District in any action or proceeding seeking to compel disclosure of such materials; the District’s sole involvement in any such action shall be that of a stakeholder, retaining the requested materials until otherwise ordered by a court of competent jurisdiction.

- 1.10. Full Opportunity.** The District hereby affirmatively ensures that Disadvantaged Business Enterprises (“DBE”), Small Local Business Enterprises (“SLBE”), Small Emerging Local Business Enterprises (“SELBE”), Disabled Veterans Business Enterprises (“DVBE”), and minority and women business enterprises shall be afforded full opportunity to submit responses to this RFQ. No respondent shall be excluded from participating in, be denied the benefits of, or otherwise be subjected to discrimination on the basis of race, color, gender, sexual orientation, political affiliation, age, ancestry, religion, marital status, national origin, medical condition or disability, in any consideration leading to the award of contract.

SECTION 2: PROJECT OVERVIEW / DESCRIPTION

- 2.1** The Project Team currently includes Studio W Architects as the Architect, LP Consulting Engineers as the Engineers of Record and Sixth Dimension as the Construction Manager.
- 2.2** The District seeks a Commissioning Authority to provide a detailed Proposal related to the Scope of Work which is more fully described herein. The Commissioning Authority should demonstrate expertise in the project specific requirements. The Respondent shall demonstrate its ability to work as part of a collaborative team and also demonstrate its ability to work closely with the District and other interested parties including, but not limited to, architectural and design firms, construction managers, MEP contractors, utility contractors, equipment manufacturers and other

consultants. Such collaboration is critical to the District in order to successfully implement this Project.

The District is committed to commissioning the Project to ensure proper installation, operation, functionality, and performance of installed building systems. The commissioning process shall extend from the design phase through acceptance and warranty. The commissioning process shall oversee and coordinate design and operations review, equipment start-up, system testing and performance verification, handover documentation and facilities operator training.

SECTION 3: SCOPE OF WORK AND PROPOSAL REQUIREMENTS

3.1 The Commissioning Authority will develop a comprehensive matrix of all commissioning activities and integrate the list with project QA/QC activities to expose any commissioning scope gaps. The matrix be updated at regular intervals and shared with the project team. The Commissioning Authority will commission all energy-related active and passive systems, including all associated controls, in the design that are applicable to this project which include, but may not be limited to:

1. Mechanical/HVAC/Refrigeration Equipment, Systems and Distribution
2. Plumbing Equipment, Systems and Distribution
3. Electrical Emergency Power Equipment, Systems and Distribution
4. Electrical Normal Power Supply Equipment, Systems and Distribution
5. Electronic Safety and Security Equipment, Systems and Distribution
6. Communications Equipment, Systems and Distribution
7. Fire Sprinkler Equipment, Systems and Distribution
8. Building Automation Equipment and System (BAS)
9. Building Envelope Systems.

Detailed Requirements

The Scope of Services shall include, but shall not be limited to the following:

Design Phase:

- Coordinate and lead a kick-off commissioning scoping meeting with district, design team, construction manager, and other project stakeholders to discuss commissioning process and plan. Meeting agenda shall include, but not be limited to, the following:
 - Review of the Commissioning Plan
 - Review of Individual roles and responsibilities
 - Review of document requirements
 - Communication and reporting procedures
 - Review of PFT and FPT check lists and forms utilized on the project
 - Commissioning schedule
- Review the District's Project Requirements (OPR) documentation for clarity and completeness including addressing the following performance: mechanical, electrical, plumbing, architectural, structural, lighting, energy and water consumption, indoor environmental quality, sustainability, life safety and fire protection. Written comments on OPR will be required.

- Review engineering Basis of Design and provide written feedback on alignment with OPR.
- Perform commissioning design reviews of all project drawings and specifications at each design milestone including back check at 95% CDs.
- Coordinate and facilitate design commissioning coordination meetings with the project team to discuss the results of design reviews and to develop and review status of commissioning specification/plan, each member's tasks and commissioning project deliverables during design phase.
- Draft and implement a Commissioning Plan for the Construction Documents (CDs) encompassing design, construction, occupancy and operations phases, including the requirements and activities to include in the construction documents and specifications. The Plan shall include, but not be limited to, the following:
 - Definition of systems included in the project commissioning process
 - Procedures for coordinating work to permit documented verification of installation and start-up
 - Definition of roles and responsibilities for all commissioning and project team members
 - Definition of requirements for District's operator training
 - Procedures for reporting, deficiency resolution, and testing methods.
- Coordinate and facilitate a controls integration meeting where the electrical and mechanical engineers, district, and the Commissioning Authority discuss integration issues between equipment, systems and disciplines to ensure the integration issues and responsibilities are clearly described in the specifications.
- Make suggested commissioning reference inserts into documents.
- Provide air & water balancing specification review.

Bidding Phase

- Attend and participate in pre-bid meetings for trade contractors and subcontractors by providing an overview of the commissioning process, the requirements of the commissioning specifications and plan, and answering related questions.
- Assist in answering RFIs related to commissioning which are received during the bidding phase.

Construction

- Direct the commissioning process through facilitation of all meetings, tests, demonstrations, training events, and performance verifications described in the contract documents and approved commissioning process. Organizational responsibilities include preparation of agendas, attendance lists, and timely notification to participants for each commissioning event. The Commissioning Authority shall facilitate all commissioning events and ensure execution of all agenda items. The Commissioning Authority shall prepare minutes of every commissioning event and send copies to all commissioning team members and attendees within five workdays of the event.
- Ensure that commissioning activities are included in the project master schedule and contractor's construction schedule.
- Facilitate commissioning meetings throughout construction. Conduct pre-construction meetings where the commissioning process requirements are reviewed with the team including, but not limited to reviewing the complete commissioning process and establishing tentative schedules for HVAC and electrical system orientation and inspections; O&M submittals; training sessions; system flushing and testing; job completion; testing, adjusting, and balancing (TAB) work; and

functional performance testing. For purposes of this proposal assume weekly meetings and frequency.

- Review the testing, adjusting and balancing (TAB) execution plan before TAB is executed, and oversee functional testing of the control system, and order and coordinate re-testing as needed.
- Review applicable RFI's, addendums, and change order proposals for impact on commissioning and district's project requirements.
- Review of all architectural, design & contractor submittals applicable to systems and equipment being commissioned. Submit findings to district and design team.
- Coordinate and direct commissioning activities using consistent protocols and forms, regular communications, consultations with all necessary parties and schedule updates. Work with District and Contractor in maintaining commissioning plan and project timeline.
- Finalize pre-functional testing checklists and functional performance test (FPT) procedures for equipment and building systems to be commissioned.
- Review equipment submittals for equipment being commissioned concurrently with the review by Design Team and District to obtain equipment and system information and ensure compliance with the commissioning needs and requirements. Advise the District of any deficiencies noted that may impact the commissioning execution or intended system performance. Assist in resolving any discrepancies.
- Draft Preliminary PFPT (pre-functional performance test) system readiness checklists.
- Draft Preliminary FPT (functional performance test) narratives.
- Review O&M submittals for equipment being commissioned.
- Review and update FPTs based on Contractor feedback.
- Review the contractor start-up plans.
- Deliver FPTs for Contractor use in completing system FPT dry-run.
- Review contractor/manufacture supplied equipment start-up forms prior to start-up.
- Before Start-up, gather and review the approved control sequences of operations and interlocks, and work with the CM, appropriate trade contractors, and design engineers to write a detailed functional performance test procedure. Functional performance test procedures should include requirements for operating each system and its components through each sequence of operations including: start-up, shutdown, manual mode, staging, power failure, security alarm.
- Perform site visits and document system readiness installation observations, progress photos, and distribute field reports.
- The commissioning authority to coordinate project specific Functional Performance Tests (FPTs) with Engineer of Record that define acceptable results of the tests to be performed at design and part load conditions.
 - Functional Performance verification of Air handling units
 - Functional Performance verification of smoke management system
 - Functional Performance verification of Heating and Ventilation
 - Functional Performance of Preheat hot water system
 - Functional Performance of Reheat hot water system
 - Functional Performance of air terminal system and VAV components
 - Functional Performance of all required critical and equipment alarms
- Integrated Testing During Normal Power Outage
 - Building Automation Systems
 - Chiller Plan
 - Air Handling Systems
 - Smoke Management Systems

- Heating and Ventilation Systems
- Sump Pumps
- Alarm Switches
- Elevators
- Integrated Life Safety Testing (ILST) of Active and Passive Life Safety Systems
 - Infrastructure Supporting Fire Protection and Life Safety Systems
 - Fire Suppression and Controls Systems
 - Emergency Communications Systems
 - Smoke Control and Managements Systems
 - Explosion Prevention Controls Systems

Acceptance Phase

- Direct and witness functional performance testing of each system and major piece of equipment to demonstrate that the equipment and systems are operating according to the design intent and contract documents. Functional performance testing shall include operating the system and components through each of the written sequences of operation, as well as, point to point verification of critical components.
 - The Commissioning Authority shall check the operation of control valves and control actuators. The Commissioning Authority shall review trend logs for all control loops and perform a real-time review of space temperature and pressure gradients to determine if the temperature and pressure differentials of each individual space are maintained within the design criteria. Operation of all equipment shall be visually verified, at the piece of equipment and verified that the control system readouts correspond with the actual operation. The Commissioning Authority shall document proper operation and any deficiencies or deviations from the design criteria, and document proper operation after any required corrections.
- Witness major equipment first time start-ups.
 - To include but not limited to:
- Witness factory testing as required.
- Review Contractors' equipment and system training plans, timeline, and training documents and supplement as deemed appropriate.
- Develop and update field notes, PFPT corrective action log and pending issues log throughout the project. Provide log and testing results to district and CM, along with recommended actions, on a monthly basis or daily during functional testing.
- Items of non-compliance shall be corrected by contractor. CxA shall notify the District of any re-tests and expenses associated with re-tests as these costs will be passed on to the contractor.
- Facilitate FPT demonstration with District (Reps) & Contractors.
- Collect BAS trend data. The key data should be charted to illustrate proper function.
- Evaluate FPT reports.
- Maintain Overall Cx Log or Issue Resolution Log.
- Verify installation, functional performance testing (including off-season testing), and training, operations and maintenance documentation of systems to be commissioned.
- Coordinate and verify training requirements of operational personnel and building occupants has been completed.
- Check the system graphics to verify all graphic pages are developed and display the data in a format that is easily understood and useful to the operations department. Check all of the DDC

points mapped to the graphics to confirm they are correct and units and system descriptors are displayed correctly.

- Complete a summary commissioning report and submit to district. The report shall include, but not be limited to, the following:
 - District's Project Requirements
 - Basis of Design
 - Commissioning Agent design and submittal review reports
 - PFT checklists completed
 - Functional checklists completed
 - TAB reports
 - System Schematics
 - Guidelines for energy accounting
 - Commissioning observation deficiency log highlighting any outstanding issues.
- Complete the required systems review.
- Maintain documentation for all of the above items and update all documentation as necessary. Provide regular reports to district, including summary.
- Deliver final commissioning report to the district (Includes paper & CD copy of final report).
- Systems should be tested under normal, loss of normal power, transition to emergency power, life safety emergency, and transition back to normal scenarios. The Commissioning Authority is responsible for developing a testing program and testing checklist, which should include the following:
 - A comprehensive list of all systems to be tested. This should depict all system input and associated output functions in matrix format.
 - A testing schedule which will be reviewed and approved by the district prior to testing.
 - Testing processes to be incorporated.
 - Testing scenarios

Post Commissioning Warranty Phase:

- Schedule and facilitate deferred and seasonal FPT demonstration(s) with Contractor.
- Maintain FPT corrective action log.
- Conduct a 10-month warranty, post-occupancy review. Review the current building operation and status of outstanding issues with facility staff. Interview facility staff to identify problems with operating the building. 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. Included a plan for resolution of outstanding commissioning related issues.
- This post occupancy checkout shall include a review based on trend data for representative heating, cooling and intermediate conditions over the last 10 months. This post occupancy checkout should be completed during a different season than the initial checkout to be sure that proper operation is documented in both heating and cooling conditions.
- Assist in the development of a preventative maintenance plan.
- Document any warranty issues discovered.

3.2 Furnish a comprehensive proposal in response to the RFP for performing the commissioning services on the above referenced Project. Include all items below:

- 1. Team Structure & Organization Chart:** Describe the proposed team structure and identify the Project Manager (PM) and other key team members who will directly work on the Project. Provide an organization chart that clearly illustrates the roles and responsibilities and geographic location of all individuals. Provide clarity on how much involvement each team member will have. It is important to identify the geographic location of the firm as well as the key team members and sub-consultants, and to the extent that any of the key team members are not local, to provide clarity on their ability to fully participate in a highly interactive and collaborative environment. The Respondent shall identify a Project Manager who will lead the team in the delivery of the commissioning services as well as all other key members of the team, and summarize their qualifications, and their specific expertise to deliver such services. The respondent will provide descriptions of at least 3 and up to 5 similar projects, with reference, identifying at least 1 current team member's involvement in each referenced project.

The Proposal shall also highlight the firm's experience in providing commissioning services on projects of similar scope and size.

- 2. Approach and Work Plan:** Describe the team's understanding of and its approach to implementing the Scope of Services including the process by which feedback will be solicited, collected and incorporated into the peer reviews. Provide an overview of the team's implementation schedule highlighting the major phases, milestones and recommended meetings. Describe the team's approach to risk management.
- 3. Fee Proposal:** Provide a list of Billable Rates for all proposed team members, sub-consultants and personnel. The fee proposal should list the personnel and hours and associated fee for each phase as described in the scope of services above. It is important that the fee proposal describe each task and include a breakdown of the level of effort for all project personnel associated with each task, including sub-consultants, so that the District can understand and evaluate how the proposal was developed by the team. Cost proposal must include all costs to successfully provide and complete the scope of work requirements and deliverables as noted above. Include a not-to-exceed line item budget of reimbursable for the Services to be provided and assumptions that support these reimbursable. Costs for all required lodging, meals and all miscellaneous expenses must be included in your proposal.

3.3 Proposing firms shall provide insurance covering claims arising out of the performance of professional services under the Agreement and caused by errors, omissions, and negligent acts for which the professional is legally liable. Any limits of liability stipulations shall not be less than **\$1,000,000.00**.

SECTION 4: SUBMITTAL

- 4.1** Proposals are due not later than **2:00 PM on June 7, 2023**. Please submit **five (5)** hard copy and **one (1) electronic copy** (on a flash drive) of your response to this Request for Proposals to:

ALUM ROCK UNION SCHOOL DISTRICT
2930 Gay Avenue
San Jose, CA 95127
Attn: Mr. Marc Freitas

- 4.2** Questions must be submitted in writing to Mr. Marc Freitas, Bonds Director at marc.freitas@arUSD.org and a copy to Deborah Slivkoff, Program Manager at dslivkoff@cumming-group.com, by **May 30, 2023 at 4:00 PM**. Responses will be provided to all firms.

- 4.3.** RFQ Response Format and Organization. Each RFQ Response must conform to the following described organizational format and must include the contents described below. Failure of a Respondent to submit its RFQ Response in a format and with contents conforming to the following requirements will be a basis for the District's rejection of such RFQ Response for non-responsiveness.

4.3.1. Cover Sheet. Identify the submittal as RFQ No. 2223-Bonds34 Response to this RFQ and an identification of the firm submitting the RFQ Response along with the firm's address, telephone/fax numbers and email addresses of the firm's principal contacts in connection with this RFQ or the RFQ Response.

4.3.2. Letter of Interest. Include a brief letter, signed by an authorized officer of the firm, expressing the interest of the Respondent in providing Services for the Project and a brief statement of the Respondent's relevant qualifications. If the firm is a joint venture, duplicate the signature block and have a principal or officer also sign on behalf of each party to the joint venture.

4.3.2.1. Provide contact information, including the address, telephone number, fax number and email address for the personnel of the Respondent who is the designated point of contact for this RFQ.

4.3.2.2. Clearly identify the individual(s) who are authorized to speak on behalf of the firm during the evaluation process. The letter of interest should be bound with other materials responding to this RFQ.

4.3.2.3. Respondent shall certify that no official or employee of the District, nor any business entity in which an official of the District has an interest, has been employed or retained to solicit or assist in the procuring of the resulting contract(s), nor that any such person will be employed in the performance of any/all contract(s) without immediate divulgence of this fact to the District.

4.3.3. Business Information. Respondent must provide the following information for itself and for any and all other firms which it will joint venture or associate on this Project:

- 4.3.3.1. Company name, address, telephone, fax, website.
- 4.3.3.2. Federal Tax I.D. Number
- 4.3.3.3. License or Registration Number
- 4.3.3.4. Type of organization/business structure (ownership, legal form, i.e. corporation, partnership, etc., and senior officials of the entity). If a joint venture, describe the division of responsibilities between participating companies, offices (locations) that would be the primary participants, and percentage of each firm.
- 4.3.3.5. A brief description and history of the firm, including number of years the firm has been in business and date firm was established under its given name.
- 4.3.3.6. Any State of California certification for your firm indicating Small Business of Disabled Veteran Business Enterprise status.
- 4.3.3.7. How sub-consultants, if any, are generally used by your firm and to what extent work is performed in-house versus by a sub-consultant. Provide similar Business Information for proposed sub-consultants.
- 4.3.4. Table of Contents. Include a Table of Contents reflecting the Respondent's responses to each of the items set forth below.
- 4.3.5. Tab 1: Statement of Qualifications. Complete the Statement of Qualifications ("SOQ") attached as Attachment B to this RFQ for the Respondent.
- 4.3.6. Tab 2: Project Approach, Qualifications, Relevant Project Experience
 - 4.3.6.1. Provide additional details of the projects identified in the SOQ which reflect the skills, experience and other qualifications of the Respondent to successfully complete necessary services for the Project.
 - 4.3.6.2. Provide a statement demonstrating your firm's ability to accomplish the scope of services in a comprehensive and thorough manner with an aggressive schedule.
 - 4.3.6.3. Describe your firm's experience with DSA and working within the DSA process.
 - 4.3.6.4. Provide a statement of your work plan including your firm's present workload and number of current projects, and where possible, projected workload for the coming two (2) years, which should include available staff.
- 4.3.7. Tab 3: Insurance Certificates. Provide copies of Certificates of Insurance for the

Respondent; required Certificates of Insurance and minimum coverage amounts for each policy of insurance are as set forth below.

Policy of Insurance	Minimum Coverage Amount
Workers Compensation	In accordance with law
Employers Liability	One Million Dollars (\$1,000,000)
Commercial General Liability	One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) in the aggregate
Automobile Liability	One Million Dollars (\$1,000,000) combined single limit
Professional Liability	One Million Dollars (\$1,000,000) per claim, Two Million Dollars (\$2,000,000) aggregate

4.3.8. Tab 4: Personnel and Resumes. The selected firm shall employ, at its expense, professionals properly licensed and skilled in the execution of the functions required for the applicable services as described herein.

4.3.8.1. Identify and provide resumes, including responsibilities, titles, licenses, certifications, and clearly identify experience in school projects, for key personnel and/or team members, including sub-consultants, and the roles to which they will be assigned. List dates of employment by your firm whether employed as an employee, independent contractor, sub-consultant, or otherwise, and office addresses for each of the identified personnel. Resumes shall include specific qualifications and recent related experience and shall include a list of references with contact names and phone numbers.

4.3.8.2. If any work is to be provided by sub-consultants include a statement as to how this shall be organized, including identified roles and qualifications of sub-consultants, if any. Note: firm(s) selected for inclusion in the District’s pool of applicable consultants will be required to demonstrate long term relationships with any sub-consultants.

4.3.8.3. The District expects that the team shall remain intact through the duration of the Project(s). If a team member must leave, the District reserves the right to approve that team member’s replacement.

4.3.9. Tab 5: Letter of Agreement

4.3.9.1. Respondents must include one of the following statements, signed by the firm’s authorized representative:

“[INSERT FIRM’S NAME] received a copy of the District’s standardized form of Independent Consultant Agreement for Project Inspector Services (“Agreement”) attached as Attachment A to the RFQ. [INSERT FIRM’S NAME] has reviewed the terms contained in the Agreement, including the indemnification and insurance provisions. If given the opportunity to contract with District, [INSERT FIRM’S NAME] has no objections to the use of the Agreement and accepts all terms and conditions of the Agreement, without conditions, qualifications or reservations.”

OR

“[INSERT FIRM’S NAME] received a copy of the District’s standardized form of Independent Consultant Agreement for Project Inspector Services (“Agreement”) attached as Attachment A to the RFQ. [INSERT FIRM’S NAME] has reviewed the terms contained in the Agreement, including the indemnification and insurance provisions. If given the opportunity to contract with District, [INSERT FIRM’S NAME] has objections to the use of the Agreement, listed as follows: [IDENTIFY ALL OBJECTIONS].”

- 4.3.9.2. Where Respondent requests modification consisting of amendments to existing provisions or additional provisions, the Respondent must set forth: (i) the section number of the existing provision and (ii) the complete text of the requested amendment or addition. Any Respondent that does not identify modifications to terms or conditions of the attached Agreement will be deemed to have agreed to and accepted all terms and conditions set forth therein, if the Respondent is awarded the Agreement.
- 4.3.10. Tab 6: Price Proposal. Although this RFQ is not a request for a specific proposal, the District requires each Respondent to provide a price proposal for services offered by Respondent on the form of Price Proposal attached to this RFQ as **Attachment C**.
- 4.3.11. Tab 7: Acknowledgment of Addenda
 - 4.3.11.1. If the District issued Addenda to the RFQ, Tab 7 must include the following statement: “The Respondent submitting this RFQ Response acknowledges receipt of Addenda Nos. _____. The Respondent confirms that requirements noted in the foregoing Addenda are incorporated into the RFQ Response.
 - 4.3.11.2. If the District did not issue Addenda to the RFQ, Tab 7 must include the following statement: “No Addenda issued.”
- 4.3.12. Additional Materials. Respondents are not prohibited, but are discouraged, from submitting materials in addition to the required contents listed above. If a Respondent elects to submit materials with its RFQ Response which are in addition to the information requested in this RFQ, the Respondent shall bind all such additional materials separate from the required RFQ Response.

SECTION 5: DISTRICT'S RIGHTS

5.1 The District reserves the right to reject any and all Proposals and may also waive any and all formalities during the selection process. The District reserves the right to select the firms they feel are best suited for the Project and will not debrief firms who are not selected.

5.2 Verification of Information: Proposers are hereby notified that the District will rely on the accuracy and completeness of all information provided in making its selection. As such, Proposers are urged to carefully review the provided information to ensure the clarity, accuracy and completeness of such information. The District, at its sole discretion, reserves the right to make any inquiries or follow-up as required to verify the information provided.

SECTION 6: ATTACHMENTS

Attachment A – Consultant Agreement to be provided under separate attachment

Attachment B – Statement of Qualifications Form

Attachment C – Price Proposal

Attachment D – Drawings and Specifications to be provided under separate attachment

ATTACHMENT A

**INDEPENDENT CONSULTANT AGREEMENT FOR
COMMISSIONING SERVICES**

****PROVIDED UNDER SEPARATE ATTACHMENT****

ATTACHMENT B

STATEMENT OF QUALIFICATIONS FORM

1. Respondent Information.

1.1. Respondent: _____

1.2. Address:

Physical Office Location:

Street Address : _____

City, State and Zip Code: _____

Mailing Address (if different than address above):

Street Address : _____

City, State and Zip Code: _____

1.3. Phone:

(_____) _____

1.4. Fax:

(_____) _____

1.5. Respondent's principal contacts:

Name: _____

Title: _____

Phone: (_____) _____

Fax: (_____) _____

E-Mail: _____

Name: _____

Title: _____

Phone: (_____) _____

Fax: (_____) _____

E-Mail: _____

1.6. Length of time Respondent has been in business providing project Commissioning Services:

_____ years

1.7. Respondent Federal Tax ID No.: _____

2. Insurance.

2.1. Commercial General Liability Insurance.

Insurer: _____

Current Policy No.: _____

General Liability Insurance Broker:

Address: _____

Telephone No.: (____) _____

Fax No.: (____) _____

Contact Name: _____

2.2. Automobile Liability Insurance.

Insurer: _____

Current Policy No.: _____

General Liability Insurance Broker:

Address: _____

Telephone No.: (____) _____

Fax No.: (____) _____

Contact Name: _____

2.3. Professional Liability Insurance.

Insurer: _____

Current Policy No.: _____

General Liability Insurance Broker:

Address: _____

Telephone No.: (____) _____

Fax No.: (____) _____

Contact Name: _____

2.4. Workers' Compensation Insurance.

Insurer: _____

Current Policy No.: _____

Workers' Compensation Insurance Broker:

Address: _____

Telephone No.: (____) _____

Fax No.: (____) _____

Contact Name: _____

- 3. References.** Complete the following to identify: (i) owner references that are California public K-12 School Districts and/or California Community College Districts; and (ii) architect references. Architect references must be architects that have served as the architect of record for K-12 school or community college projects subject to DSA jurisdiction. A minimum of three (3) references are required per category.

Public School Districts			
District Name	Address	Telephone No.	Contact

Architects			
Firm Name	Address	Telephone No.	Contact

- 4. Prior Project Commissioning Experience.** Duplicate the following to provide details of ***all California K-12 School District or California Community College District projects*** for which your organization provided commissioning services, ***within the past five (5) years***. Complete the following for each Project subject to the foregoing. Attach completed copies of the following to the completed and executed Qualifications Statement submitted concurrently with the Respondent's RFQ Response.

Project Identification (by name or other identification for project) and location	
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Commissioning Services
RFQ No. 2223-Bonds34

Project Description (including building structural system, type of building occupancy, square footage, etc.)	
Beginning and end dates of project, including DSA close-out and/or certification status and date of project's Notice of Completion	
Scope/Description of construction materials test/inspection provided	
Respondent's Engineering Manager for Project and key personnel	
Project Owner (include contact person and contact information for contact person)	
Architect of Record for Project (include contact person and contact information for contact person)	
Construction Manager, if applicable (include contact person and contact information for contact person)	

ATTACHMENT C

PRICE PROPOSAL

Respondent: _____

The above-identified Respondent proposes the following pricing for services:

1. Commissioning. Respondent proposes a lump sum, fixed price of _____ Dollars (\$_____) for completion of the commissioning services for the Project as indicated in Independent Consultant Agreement for Project Commissioning Services attached to the RFQ as Attachment A.
2. Breakdown of Proposed Commissioning Pricing. The pricing proposed in Paragraph 1 above is broken down as follows:

Commissioning Description	Unit Description (per inspection, per hour, etc.)	Costs Per Unit

3. Acknowledgment and Confirmation. The Respondent acknowledges its receipt and review of the Request for Qualifications and Independent Consultant Agreement for Commissioning Services so that it has a full and complete understanding of the requirements for the Project. The Respondent and its personnel are duly certified, licensed, approved and otherwise qualified to complete the commissioning required for the Project under the Independent Consultant Agreement for Project Commissioning Services, if an agreement is awarded to Respondent. The undersigned: (i) has

reviewed and verified the accuracy and completeness of the foregoing Price Proposal and (ii) is authorized to bind and commit Respondent to the foregoing Price Proposal.

By: _____

(Signature of Respondent's Authorized Officer
or Representative)

(Typed or Printed Name)

Title: _____