

Request for Qualifications (Commissioning Agent)

Modified State of Ohio Standard Forms and Documents

Project Name Districtwide Improvements Project Response Deadline 12:00 p.m. on April 22, 2024
Owner Yellow Springs Exempted Village School
District Board of Education
Project Location Various Locations City / County Greene
No. of paper copies requested (stapled, not bound) 4 No. of electronic copies requested on CD (PDF) 1

Submit the requested number of Statement of Qualifications (Form F110-330) (SOQ) directly to Jacob McGrath, Treasurer at 5959 888 Dayton Street, Suite 106, Yellow Springs, Ohio 45387.

In addition to the above, interested individuals and firms are asked to upload an electronic copy of their SOQ to the following ShareFile URL:

<https://bricker.sharefile.com/r-r45b7bffc69cc4866898e442906837ee2>

(To access simply enter the ShareFile link above into your web browser and then “drag and drop” your electronic file into the folder or use the browse function to locate the file.)

The Owner reserves the right to waive any defect or technicality in any SOQ received or to eliminate any firm that submits an incomplete or inadequate SOQ or that is not responsive to the requirements of this RFQ.

Questions, Clarifications and Addenda: All questions concerning this RFQ shall be directed in writing via email to **Jacob McGrath, Treasurer** at jmcgrath@yssschoools.org by **April 15, 2024 at 12:00 p.m.** Questions will be reviewed, and the Owner will determine whether any addenda should be issued as a result of any pertinent or substantive inquiries. Addenda will be issued to all firms that have requested the RFQ for the Project. Firms shall not rely on any oral instructions or answers.

Project Overview

A. Project Description

This Project is anticipated to include:

1. Renovation of the existing Mills Lawn Elementary School building located at 200 S. Walnut St., Yellow Springs, OH 45387. (Budget of **\$14,660,842**; CMR delivery model; LFI)
2. Demolition, renovation and addition to the McKinney Middle School & Yellow Springs High School located at 420 E. Enon Road, Yellow Springs, OH 45387. (Budget of **\$40,640,075**; CMR delivery model; OFCC-ELPP)
3. Other miscellaneous capital improvements determined by the Owner through the design process. The Owner further reserves the right to modify the above budgets and scopes of work.

B. Scope of Services

The selected Commissioning Agent (“CxA”), as a portion of its required Scope of Services and prior to submitting its proposals, will discuss and clarify with the Owner, the cost breakdown of the Consultant Agreement and detailed cost components to address the Owner’s project requirements.

As required by the Agreement, and as properly authorized, provide the following categories of services: the objective of the CxA is to provide documented confirmation that a facility fulfills the functional and performance requirements of the building owner, including, but not limited to, fundamentals contained within Climate Action Plan, Energy & Infrastructure Plan, Green Build and Energy Policy 3.10, and Integrated Energy & Environmental Implementation Strategies, and sustainable practices. These projects will not be pursuing LEED accreditation. To reach this goal it is necessary for the commissioning process to develop and document the owner’s criteria for system function, performance, and maintainability, as well as to verify document compliance with these criteria throughout design, construction, start-up, initial operation and seasonal operation. In addition, complete electronic operation and maintenance (O&M) manuals, as well as training on system operations should be provided to the building operators to ensure the building continues to operate as intended.

The CxA will be involved from the construction design phase through the warranty phase. The CxA will be responsible for reviewing and thoroughly documenting the Owner's Requirements and Basis of Design through reviews and have interaction with the Project Engineer and Yellow Springs Exempted Village School District. The primary role of the CxA during the overall design phase is to develop detailed commissioning specifications, and to review design to ensure it meets the Owner's objectives (Schematic Design review excluded). During construction, the CxA coordinates the execution of a testing plan, which includes observing and documenting all systems' performance to ensure that systems are functioning in accordance with the Owner's objectives and the contract documents. The CxA is not responsible for design or general construction scheduling, cost estimating, or construction management, but it may be necessary to assist with problem-solving non-conformance issues and deficiencies. The CxA will be required to provide input on the overall master schedule where they are to perform tasks.

The CxA will be required to organize, conduct and document dedicated commissioning meetings throughout the design and construction phases of the project, as needed. During the commissioning phase of the construction period, the CxA will provide services as necessary per the implementation plan, including (1) attendance at progress meetings designated by Yellow Springs Exempted Village School District, (2) written reports, (3) onsite representation comprising the commissioning provider and its consultant staff involved in the project, all having relevant and appropriate types of building construction experience.

The CxA may be responsible for contracting with an outside firm for independent testing and balancing of systems. Firm should have expertise and certifications through NEBB on Testing, Adjusting, and Balancing.

Scope may also include commissioning services for the other projects in the Districtwide Improvements Project.

The OFCC Commissioning Scope of Work will be followed for this project, with the exception of LEED requirements and schematic design review. A detailed OFCC commissioning scope of work can be found in Exhibit A attached.

C. Evaluation Criteria for Selection

- Demonstrated ability to meet Owner's project requirements.
- Previous experience compatible with the proposed project (e.g., type, size).
- Relevant past work of prospective firm's proposed consultants.
- Past performance of prospective firm and its proposed consultants.
- Qualifications and experience of individuals directly involved with the project.
- Proximity of prospective firms to the project site.
- Proposer's apparent resources and capacity to meet the needs of this project.
- Experience Managing Testing, Adjusting, and Balancing work contractors.
- Certifications by NEBB on Testing, Adjusting, and Balancing work.

D. Additional Information Requested for the Project

In addition to the information listed above, the firm's submittal should include the following:

- Identification of the partner in charge of the Project, as well as any other personnel assigned to the Project, together with the education, technical training, and experience of these individuals, to the extent it has not been provided with the firm's qualifications.
- Description of the steps the firm will take to coordinate its consulting services with the Architect.
- The firm's practices with respect to site visits and oversight during construction, if applicable.
- Provide any information about claims against the firm related to design and construction of projects, including claims against professional liability insurance and claims filed in a court of law or other dispute resolution forum.
- Provide professional liability insurance coverage limits maintained by the firm.

E. Submittal Instructions

Firms are required to submit the current version of Statement of Qualifications (Form F110-330), available via the OFCC website at <http://ofcc.ohio.gov>. The form is also attached as **Exhibit B**.

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

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

Firms are requested to identify professional registrations, memberships, and any other appropriate design and construction industry credentials. Identify that information on the resume page for individual in Block 22, Section E of the F110-330 form.

F. Exhibits

- Exhibit A: Commissioning Agent Scope of Work
- Exhibit B: Statement of Qualifications Form

Exhibit A - Consultant Scope of Services (K-12 School Commissioning) State of Ohio Professional Services Agreements for Public Facility Construction

ARTICLE 1 - GENERAL REQUIREMENTS

1.1 Introduction

1.1.1 Commissioning (“Cx”) is a quality assurance process that works to ensure the Owner’s Project Requirements (“OPR”) and the Design Intent (“DI”) of a building is fully realized. It requires a systematic approach to review, verify, and document that the specified components and systems have been designed, installed, properly started up, and functionally tested to proper operation of equipment through all modes and conditions, including seasonal systems tests. The process begins at the beginning of the schematic design phase and extends through project completion, closeout, and warranty reviews. Documentation of Cx activities is provided to the building owner as a Systems Manual that outlines the events and findings of the project, including a comprehensive review of all findings, recommendations, and resolutions of identified problems. Cx is not intended to replace or eliminate any requirements or responsibilities for reviews, inspections, or other quality control measures by any other firm, organization, or party. Designers, contractors, construction managers, and project managers maintain their obligations as a function of their roles and responsibilities.

1.1.2 In September 2007, the predecessor of the Ohio Facilities Construction Commission (“OFCC”) adopted Resolution 07-124 with the intention that all new and substantially renovated school buildings under OFCC jurisdiction be designed to achieve U.S. Green Building Council (“USGBC”) Silver certification level as defined within their LEED for Schools rating system. The language of Resolution 07-124 requires emphasis on energy performance, implicitly requiring enhanced Cx. The USGBC encourages best practices in building design through its Leadership in Energy and Environmental Design (“LEED”) building certification and professional accreditation. As part of LEED certification, basic building Cx is required. Additional credit is available for projects that incorporate and document enhanced Cx.

1.1.3 Beginning in July 2012, OFCC combined Cx services with the services previously provided under a separated prequalification agreement for maintenance plan development. The combined service will provide enhanced focus on the integration of the facility operations and staff into the design/build process. The commissioning agent (“CxA”) will work together with the owners to develop and deploy facility maintenance and operations (“M&O”) program that meets the financial and operational needs of the district. This process will include the Cx systems manual, OFCC maintenance plan documents and processes, district facility M&O assessment, and assisting the facility staff’s exposure and to the construction process. The facility M&O engagement and deployment will begin at OPR and conclude after the ten-month review.

1.1.4 As defined by USGBC, Cx is:

1.1.4.1 EA Prerequisite – Fundamental Cx: Verify that the building’s energy-related systems are installed, calibrated, and perform according to the Owner’s Project Requirements, Basis of Design, and Construction Documents.

1.1.4.2 EA Credit – Enhanced Cx: Begin the Cx process early during the design process and execute additional activities after systems performance verification is completed.

1.2 Definitions and Role Clarification

1.2.1 Abbreviations and defined terms:

1.2.1.1 “SD” means the School District.

1.2.1.2 “OFCC” means the Ohio Facilities Construction Commission.

1.2.1.3 “OSDM” means the Ohio School Design Manual published by OFCC.

1.2.1.4 “A/E” means the Architect/Engineer for the Project, or the A/E of Record for a Design-Build Project.

1.2.1.5 “CM” means the Construction Manager Adviser for the Project (if applicable), if there is not a CM Adviser for the Project the CM role may be filled by an Owner Agent, if there is no Owner Agent for the Project the CM role may be filled by the Project Manager.

1.2.1.6 “Contractor” includes the CM at Risk or Design-Builder if those project delivery methods are utilized.

1.2.1.7 “Cx” means Commissioning.

1.2.1.8 “CxA” means the Commissioning Agent for the Project.

1.2.1.9 “RCx” means Re-commissioning.

1.2.1.10 “Design Team” means the A/E and CM collectively.

1.2.1.11 “Project Team” means the A/E, CM, Contractor(s), SD, and OFCC collectively.

1.2.1.12 “LEED AP” means LEED Accredited Professional, a credential issued by the Green Building Certification Institute (“GBCI”).

1.2.2 The CxA serves as the Owner’s contractual representative and will act in the Owner’s best interest by following accepted industry and professional standards and meeting the LEED Enhanced Cx requirements as defined by LEED for Schools. The CxA may not be an employee of or in contract with the A/E or CM on the project and will work independently from both; however, the CxA will collaborate with the A/E and CM throughout the design and construction process to meet deadlines and provide feedback to the Owner and the Design Team as the process moves forward. The CxA will work with the Design Team to upload appropriate information into the LEED Online web-tool as required for the submittal for LEED certification.

1.2.3 The CxA (by specific project-modified Cx scope agreement) will be responsible for the planning and scheduling of all Cx related activities and shall coordinate those duties with the entity responsible for overall project scheduling.

1.2.4 The School District (“Owner”) is expected to be fully engaged and active in the Cx process. The Owner will work with the A/E to define the OPR. The CxA will review and verify the OPR for completeness and clarity. The CxA will also review on a regular basis to verify the documents align with the Owner’s current expectations. Although the A/E is responsible for developing the OPR it remains the responsibility of the CxA to have a written OPR document that will be the basis for the Cx scope and process.

1.2.5 The Architect/Engineer of Record (“A/E”) is the leader of the LEED process for the project. The A/E is responsible for initial development of the OPR and for the development of the Design Intent. The design intent includes the OPR, the Basis of Design (“BOD”), and the related documents for the project. These documents comprise the body of the Design Intent document required as part of the project’s LEED submittal and will be provided to the CxA for their review and verification.

1.2.6 It is the specific responsibility of the CxA to customize the Cx process outlined below to meet the OPR, the OFCC LEED for Schools requirements and the LEED Enhanced Cx requirements.

1.3 [Not Used.]

1.4 Qualifications and Responsibilities of the CxA

1.4.1 The CxA firm shall provide and use an electronic on-line Cx tracking and reporting service as their primary Cx tracking tool.

1.4.2 Experience requirements: LEED for Schools enhanced commissioning credit requires the CxA to have documented CxA experience in at least two building projects and OFCC requires three years’ recent direct Cx project experience; all project leaders and subject matter experts will have at least three years’ direct Cx experience.

1.4.3 The CxA shall be a LEED-AP or become a LEED-AP during the scope of his or her first Cx project with the OFCC following the adoption of these guidelines.

1.4.4 The CxA building envelope thermographer shall have at least three years’ direct experience and have a Level 2 Certification.

1.4.5 The CxA will have at least three years’ direct experience in Cx and at least five years directly related operational experience of the systems and equipment that they are assigned.

1.4.6 The CxA firm shall have a proficient understanding of the OSDM.

1.4.7 The CxA shall have a proficient understanding of the OFCC facility maintenance planning web-tool and other documents.

1.4.8 The CxA will have a proficient understanding of parametric energy modeling programs such as the U.S. Department of Energy’s Quick Energy Simulation Tool (“eQUEST”).

1.4.9 The CxA shall be proficient in the use of ENERGYSTAR *Portfolio Manager*.

1.4.10 The CxA will review and verify the OPR and DI documents developed by the A/E. The CxA shall assist the Owner in developing the required OPR document that reflects the Owner’s needs and the OFCC Program of Requirements (“POR”). The CxA will provide their narrative of the OPR to the A/E to use for creating the BOD technical document for the project. Together the OPR and the BOD documents will constitute the Design Intent documentation requirement for LEED.

- 1.4.11** The CxA shall create documentation for appropriate credit submittals to the LEED Online web-tool as directed by the project's A/E.
- 1.4.12** The CxA shall keep the Owner apprised of and involved in decision-making regarding system optimization, corrections, and issues as they arise.
- 1.4.13** The CxA shall collaborate with the CM (or the Design Team) regarding scheduling of all Cx activities.
- 1.4.14** The CxA shall inform the Design and Project Team and specifically CM of system corrections and/or optimizations that should be addressed in a timely fashion.
- 1.4.15** The CxA shall have access to an appropriate inventory of tools, equipment, instruments, and software necessary to perform Cx tasks. All CxA-provided equipment and instrumentation shall be current on all applicable certifications. CxA-provided equipment and instrumentation shall remain the property of the CxA.
- 1.4.16** The CxA shall have an expert level proficient understanding of the trades and related technology for Cx.
- 1.4.17** The CxA may rely on other Design Team members to create the systems operations and maintenance ("O&M") manual(s) and to verify that appropriate training for operating personal and building occupants is completed.
- 1.4.18** The CxA shall have proficient knowledge and proven ability to implement a facility and district wide operations and maintenance plan. The CxA will work with the district staff and A/E in developing a plan that is actionable by the district.
- 1.4.19** [Not Used.]
- 1.4.20** Should specialty or proprietary software, equipment, or tools be required for Cx activities; the CxA shall work with the CM and contractor or vendor to obtain training and access in the use of such tools. Tools will be noted in the Cx report for future re-Cx ("RCx") projects.

1.5 Commissioning Outcomes

- 1.5.1** The following are quality assurance outcomes for the Project:
- 1.5.1.1** Verify the OPR and DI for completeness and for consistency.
 - 1.5.1.2** Develop Cx plan (set objectives, schedule reviews, verify performance, create reports and summaries of findings, review O&M schedule, develop preventive maintenance / RCx plan) based on OPR, BOD, and LEED DI.
 - 1.5.1.3** Participate in critical tasks of the Design Team, including compilation of phase review submittals, eco-charrettes, energy modeling, plan reviews, etc.
 - 1.5.1.4** Achieve LEED-Silver Certification; obtaining LEED for Schools Enhanced Commissioning credit.
 - 1.5.1.5** Document successful completion of all elements of the OPR and LEED DI.
 - 1.5.1.6** Ensure quality equipment installation, functioning system interfaces, and effective controls.
 - 1.5.1.7** Optimize equipment control, design, and performance for greatest resource efficiency.
 - 1.5.1.8** Verify appropriate lighting levels in all spaces as required by LEED-for-Schools and the OSDM, whichever is the highest standard.
 - 1.5.1.9** Verify occupant Comfort and Safety.
 - 1.5.1.10** Provide the Owner with a completed Systems Manual documenting the findings, recommendations and resolutions of the Cx process.
 - 1.5.1.11** Assist the Owner with their Maintenance Plan, Work with the district and the OFCC to modify the maintenance plan to meet the needs of the Owner.
 - 1.5.1.12** [Not Used.]

ARTICLE 2 - SCOPE OF COMMISSIONING SERVICES

2.1 Systems to be Commissioned

- 2.1.1** Mechanical and Heating, Ventilating, and Air Conditioning ("HVAC") systems
- 2.1.2** Building Automation and Environmental Controls Systems
- 2.1.3** Electrical Systems: Normal Power Distribution (Main to Sub-Panel), Emergency Power System, and Alternative Energy Systems

- 2.1.4 Classroom Acoustics as prescribed by the A/E and OSDM
- 2.1.5 Chiller System and Cooling Tower Exterior Noise Review
- 2.1.6 Domestic Hot Water and Rainwater Recovery Systems
- 2.1.7 Lighting and Lighting Controls
- 2.1.8 Building Envelope Cx (including design stages)
- 2.1.9 Thermographic imaging of building walls, doors and windows and roof system
- 2.1.10 Thermographic imaging of electrical systems and rotating mechanical equipment (i.e. pumps, motors, etc.)
- 2.1.11 Re-Cx Plan
- 2.1.12 Review and Verification of Contractor-provided Facility Staff Training
- 2.1.13 Review CM's Air Quality Management Plan for the Project
- 2.1.14 Provide verification services for districts applying for ENERGYSTAR certification

2.2 Process Requirements

- 2.2.1 Cx Plan
- 2.2.2 Cx Schedule
- 2.2.3 Cx Logs and Reports
- 2.2.4 Organize and Lead the Cx process
- 2.2.5 LEED for Schools Enhanced Cx
- 2.2.6 Review, verify, and comment on the OPR
- 2.2.7 Review, verify, and comment on the Design Intent documentation, including the BOD for the operation and performance of the facility and the building systems to be Cx
- 2.2.8 Design Phase Review, Eco Charrette
- 2.2.9 Review and comment the Daylighting Based Design Process and verify completion by the A/E
- 2.2.10 Review and comment on the energy modeling and verify completion by the A/E
- 2.2.11 [Not Used.]
- 2.2.12 Facility staff skills assessment
- 2.2.13 Review, verify, and comment on the district computerized maintenance management system

2.3 Renovated Space

- 2.3.1 Renovated facility space will be commissioned. The scope of work will depend on the nature and use of the space, the systems contained within the space, and the interdependency of any new construction and the renovated space. The CxA will include the renovated space Cx in the Cx plan.
- 2.3.2 [Not Used.]

2.4 Specialty Services

- 2.4.1 Cx of systems and other services that extend beyond the **Scope of Commissioning Services** as stated above may be considered specialty services. Specialty services can only be included into the scope of work if agreed to by the Contracting Authority.

2.5 Data and Document Collection and Verification

- 2.5.1 The CxA is expected to collect all data, documents, and information necessary to complete its task. The CxA will work with the CM and the Project Team to define the timing and schedule for document collection, review and reporting for the Cx effort. The CM is the central source for project-related documents and correspondences. The CM is to collect and distribute the documents and other necessary information for the CxA and the Project Team. As necessary for commissioned systems, the following are included:

- 2.5.1.1** Review of latest available drawings, specifications, and documents.
- 2.5.1.2** Review records that are appropriate to understand Design Intent, as detailed in the BOD.
- 2.5.1.3** Review drawings and documents to verify that they conform to the Design Intent.
- 2.5.1.4** Construction Phase investigation, verification, and review.
- 2.5.1.5** Develop and set into the Specifications a document of **Certification of Readiness for Commissioning**. This document must be completed and signed by each contractor stating that the equipment or system has been installed, tested to the designed specifications by the contractor and is now ready to be commissioned. The certification must be specific as to the equipment and/or systems being certified as ready.
- 2.5.1.6** Change Orders: Review and comment of applicable approved change orders. The CxA will state in the issues log “No Change Orders Reviewed” if no change orders are made or provided to the CxA. Review as these documents are related to the A/E’s Design Intent. Simultaneous reviews can be performed. The CxA will define process with the CM to manage the CxA’s accounting for the final approved change orders. All Change orders will be included into the Issues Log.
- 2.5.1.7** Review and comment Redline and Record Drawings to identify if the A/E has incorporated information into the Owner’s record documents, The CxA will state in the issues log “No Redline or Record Drawings Reviewed” if no Redline or Record Drawings are made or provided to the CxA.
- 2.5.1.8** Post-system startup and post-occupancy evaluation of trend data for system operations, performance, and energy usage. This includes lighting and lighting control systems, building automated systems control points, energy/performance measurement established by the A/E, Energy consumption (*ENERGYSTAR Portfolio Manager*). The Owner will participate with the use of Portfolio Manager and supply necessary ongoing information. The CxA will identify trending requirements of the installing contractor as part of the Cx specification. Trends and evaluations shall be based upon the requirements set by the A/E and the CxA.

2.6 Meetings

- 2.6.1** It is expected that the CxA will meet with members of the project team as often as needed and as reasonably requested by the owner or other members of the design team. The meetings must be Cx and or OFMP relevant and include an agenda for discussion. The agenda is to be provided by the meeting organizer and in advance of the scheduled meeting. Use of technology is encouraged to reduce travel requirements. Use of technology is also encouraged in conjunction with necessary site visits and personnel meetings. The meeting expectations shall be clearly defined in the CxA’s Cx plan.
- 2.6.1.1** Within two weeks from assignment to a project the CxA will deliver a Cx plan and schedule to the Owners.
- 2.6.1.2** The CxA will plan and coordinate with the CM the schedule for Cx-related and required meetings.
- 2.6.1.3** Multiple Cx scope topics as defined in these guidelines may be combined into a single meeting as quality and efficiency allow.
- 2.6.1.4** The CxA will regularly communicate with all members of the project team as required by project status, activity, and need. These meetings include, but are not limited to:
- .1 Owner POR and DI, Eco Charrette, Executive Core, Daylighting
 - .2 50 percent and 95 percent Design Drawing, Value Engineering
 - .3 Sequence of Operations Design review meeting
 - .4 Cx relevant Contractor meetings, Project Cx and Project Status meetings
 - .5 Controls Contractor Pre-Submittal Meeting
 - .6 Kick-off and start-up, monthly construction meeting
 - .7 Warranty, Final Cx Report delivery and Systems Manual delivery meeting
 - .8 OFCC provisional maintenance plan delivery, facility staff skills assessment, OFMP report delivery
 - .9 One-year post-Cx completion level 2 performance audit
 - .10 Facilitated partnering and mediation meetings
 - .11 Other meetings as determined by the Owner
- 2.6.1.5** Coordinate with the project CM to blend or schedule Cx meetings with other regular project related meetings whenever possible.

ARTICLE 3 - BASIC SERVICES**3.1 General**

3.1.1 Basic Services to be provided by the CxA consist of the activities and stages set forth in this **Article 3**, including normal fundamental and enhanced commissioning services for the Project.

3.2 Consultation

3.2.1 The CxA shall attend regular meetings with the A/E, OFCC, and SD. The CxA shall consult with the OFCC, SD, and A/E regarding Site use and improvements and the selection of materials, building systems, and equipment. The CxA shall provide recommendations to OFCC, SD, and A/E on construction feasibility; actions designed to minimize adverse effects of labor or material shortages; time requirements for procurement, installation and construction completion; and factors related to construction cost, including estimates of alternative designs or materials, budgets and possible economies.

3.2.2 At all appropriate times throughout performance of the Services, the CxA shall contact, meet, consult, and otherwise coordinate with OFCC, SD, A/E, CM if any, governmental authorities with jurisdiction over the Project, and others for the purpose of facilitating the Project's design and construction.

3.2.3 [Not Used.]

3.3 Overview - Design Stages

3.3.1 Review and verify design for general conformance with the OPR and the BOD

3.3.2 Review and comment on an ongoing basis the projects estimated design/operational energy efficiency using as the baseline the OFCC goal of 25Kbtu/sq. ft.

3.3.3 Review and verify the designed energy efficiency is compliant with the OSDM requirements

3.3.4 Identify if the concepts for building systems developed during pre-design and earlier design phases are included in subsequent design phases

3.3.5 [Not Used.]

3.3.6 Review and comment on the accessibility and serviceability of equipment and systems

3.3.7 Ensure that no significant deficiencies exist in the contract documents related to Cx or OFMP development

3.3.8 Review and verify the life-cycle-cost analysis of systems and equipment with a significant impact to the cost of construction or the cost of operation by the district

3.3.9 Review and comment on issues that impact on the facility O&M, functionality, and staffing

3.4 Overview - All Project Stages

3.4.1 Incorporate all applicable LEED for Schools requirements and required activities for Enhanced Cx into the Design Phase Cx Plan. Update this plan as the project progresses through all phases of the project.

3.4.2 Verify that Cx is incorporated into all phases.

3.4.3 Review and verify the Cx schedule and project timeline for milestones and critical path.

3.4.4 Perform reviews of design.

3.4.5 Review, verify and comment on updates to the OPR.

3.4.6 Review, verify, and comment on completion of Daylighting and Energy Modeling by the A/E.

3.4.7 Coordinate Cx planning and updates to the Cx plan.

3.4.8 Develop and maintain Cx issues log.

3.4.9 Review and comment on the design documents as they are developed.

3.4.10 Review and comment on all related change orders.

3.4.11 Perform necessary reviews, observations, and verifications.

3.4.12 Develop Cx procedures customized to the exact systems and controls installed.

3.4.13 Supervise or perform verification and functional performance testing.

3.5 Program Verification Stage

3.5.1 The CxA (with the assistance of the CM) will define Cx roles and responsibilities of the Project Team members.

3.5.2 The CxA will conduct the Cx kick-off meeting. This is to be a standalone meeting.

3.5.3 The CxA will review and develop narrative of the OPR.

3.5.4 The CxA will review and verify the OPR and DI for clarity and completeness.

3.5.5 The CxA will develop a draft Design Phase Cx plan.

3.5.6 The CxA will verify the Cx schedule is incorporated into the project schedule.

3.5.7 Meetings will be held only as needed for these Cx purposes.

3.6 Schematic Design Stage

3.6.1 Perform the Schematic Design Stage review when the Design Stages are approximately 30 percent complete.

3.6.2 Develop the Design Phase Cx Plan.

3.6.3 Participate in Design Charrette, provide summation and comment on process and outcome.

3.6.4 Review, verify and comment on the initial Energy Modeling provided by the A/E.

3.6.5 Review, verify and comment on the BOD for the operation and performance of the facility and the building systems.

3.7 Design Development Stage

3.7.1 Perform the Design Development Stage review when the Design Stages are approximately 50 percent complete.

3.7.2 Review documents for general compliance with the BOD as required and in coordination with the A/E.

3.7.3 Perform focused reviews of the design, drawings, and specifications for systems and components included in the Cx scope of work.

3.7.4 Review and comment on energy modeling and verify the A/E has completed.

3.7.5 Review and comment on sequences of operation verify the A/E has completed.

3.7.6 Refine the Cx scope and preliminary Cx plan as required by changes to the design; itemize systems to be commissioned.

3.7.7 Review design documents to determine their effect on the verification, testing and balancing, electrical testing, maintenance and Cx and overall performance of the equipment and systems, and make recommendations.

3.7.8 Assist the A/E in the compilation and completion of a preliminary **Design Systems Manual** (to include the BOD) that will provide the operations staff useful operational detail.

3.7.9 Update the preliminary Design Phase Cx plan.

3.8 Construction Documents Stage

3.8.1 Perform the Construction Documents Stage review when the Design Stages are approximately 95 percent complete and back-check when the Design Stages are 100 percent complete.

3.8.2 Develop a draft Construction Stage Cx plan for each system to be commissioned.

3.8.3 Assist in the development of specific testing specifications.

3.8.4 Develop equipment start-up checklist. The Cx checklist must not void any manufacturer's warranty.

3.8.5 Develop verification test procedures.

3.8.6 Develop scope of the functional performance test and the functional interface specifications for the appropriate systems.

3.8.7 Develop full Cx specifications for all commissioned equipment and integrate into the specifications with the A/E and CM. The Cx specification will include, as applicable, a detailed description of the responsibilities of all parties,

details of the Cx process; reporting and documentation requirements, including formats; alerts to coordination issues, deficiency resolution; construction checklist and startup requirements; the functional testing process; and specific functional test requirements, including testing conditions and acceptance criteria for each piece of equipment being commissioned.

3.8.8 Review design documents to verify that the A/E has adequately addressed integration issues between equipment, systems, and disciplines to ensure that responsibilities are clearly described in the specifications.

3.8.9 Review and comment on controls and verify the sequences of operation. Verify that they meet the OPR and DI.

3.9 Bid and Award Stage or Subcontractor Buyout Activity

3.9.1 The CM will provide document control and distribution for the project. The CxA will define and coordinate document handling and reporting requirements with the CM.

3.9.2 Ensure that Cx is adequately reflected in the Contract Documents.

3.9.3 Verify that the controls contractor pre-submittal meeting is in the bid specifications and scheduled.

3.9.4 Attend (in person or electronically) pre-bid meeting to answer Cx-related questions.

3.9.5 The CM will provide the necessary documents to the CxA. They will distribute the documents and information provided by the CxA to the Project Team.

3.10 Construction Stage

3.10.1 The CM will provide document control for the project. The CxA will coordinate document handling and reporting requirements with the CM.

3.10.2 Verify the A/E and CM's Indoor Air Quality Management ("IAQ") Plan for the Project.

3.10.3 Conduct periodic site visits and inspections (as identified by the Cx plan and at appropriate intervals as determined by the CxA and in coordination with the CM) throughout the construction phase to verify that systems and equipment are installed in a manner that will allow the Cx process to proceed smoothly and in compliance with the plans and specifications, in accordance with the Cx plan and construction milestones, and will be documented via a submitted written report noting all pertinent observations and deficiencies.

3.10.4 The Cx process shall not void or violate any manufacturers' warranties or contractors' guarantees.

3.10.5 Coordinate the Cx planning and work with the contractors and CM to ensure that Cx activities are being incorporated into the project schedule. Confirm that the Contractor and CM (if applicable) have included updated Cx milestones in the critical path.

3.10.6 Schedule and conduct trade- or division-specific Cx kick-off meeting with each contractor/subcontractor group.

3.10.7 Notify the Contractor or CM (as applicable) when CxA personnel are at the Site.

3.10.8 Coordinate all Cx planning meetings and activities in accordance with the preliminary and/ or modified Cx plan and issue meeting agendas for all Cx meetings (the CM (if applicable) will record and distribute meeting minutes).

3.10.9 Coordinate and direct the Cx activities in a logical, sequential, and efficient manner using consistent protocols and forms, centralized documentation, and clear and regular communications; update the construction phase Cx plan as necessary.

3.10.10 Request and review additional information required to perform Cx tasks, including O&M materials, contractor start-up, and checkout procedures.

3.10.11 Perform submittal review concurrent with the A/E's review and provide recommendations to the A/E for acceptance or rejection for temperature controls, air handling units, boilers, chillers, switchgear, and emergency generator. All other submittals for the systems being Cx shall be reviewed by the CxA for information after the submittal is approved by the A/E.

3.10.12 Requests for Interpretation: Review each Request for Interpretation ("RFI") for impacts to Cx and Owner's objectives.

3.10.13 Verify the A/E and CM review of coordination drawings to ensure that all trade contractors are making a reasonable effort to coordinate work.

3.10.14 Building Envelope.

3.10.14.1 The CxA will conduct field reviews of the building envelope and periodic progress inspection/verification as planned and scheduled by the CxA. Meetings can be combined as appropriate with other meetings or events. This will include but not be limited to:

- .1 Design review
- .2 Pre-Bid Meeting (if applicable)
- .3 On site Masonry and Roofing Preconstruction Cx Meeting
- .4 Mock-ups
- .5 Periodic review progress of work and conformance to the construction documents
- .6 Final Inspection
- .7 Eleven-Month Inspection

3.10.14.2 The CxA will review and document the inspection and related documentation performed by the A/E and CM as a part of the CxA's periodic inspections and document reviews.

3.10.14.3 Field review of mock-ups to verify that they meet the design intent. Verify that the mock up is located and remains in a visible and prominent location; Verify that the mock-up is representative of the building design and that the features are present and consistent with the actual building.

3.10.14.4 Verify enclosures (envelope) system and assemblies are be evaluated on the basis of air and water tightness, review and comment on any Air Barrier Testing performed as a part of the project requirements. Air barrier testing shall not be performed by the CxA.

3.10.14.5 Verify that all building enclosure assemblies and systems (window, doors, louvers) are inspected.

3.10.14.6 The CxA final inspection shall occur after the contractors, manufacturers, and A/E's final inspections.

3.10.14.7 Perform thermal graphic imaging of the building envelope including the roof, roof to wall assembly, doors and windows. The thermographer must hold at least a Level II Thermographer Certification and have at least three years relevant practical experience.

3.10.14.8 Laboratory testing is not a part of the basic services. Testing will be included as a specialty service as conditions warrant. Gravimetric testing will be the method used for the retrieval and testing of core samples per ASTM guidelines

3.10.14.9 Testing is to occur following Occupancy and before the end of the Correction Period as conditions permit.

3.10.14.10 Witness and verify building pressurization testing as specified by the A/E and contract requirements.

3.10.15 Change Orders: Review applicable approved change orders. Review as related to the Owner's POR and the Design Intent.

3.10.16 Write and distribute checklists for commissioned equipment. Use of contractor-supplied construction checklist is permissible if reviewed and accepted by the CxA in the Cx plan.

3.10.17 Develop an enhanced start-up and initial systems checkout plan with contractors for selected equipment if the manufacture's or A/E's requirements are considered insufficient. Manufacturer's warranties must not be violated.

3.10.18 Perform site visits, as necessary, to observe component and system installations. Attend Cx-relevant planning and job-site meetings to obtain information on construction progress. Include into the Cx Plan. The CM will provide all related construction-meeting minutes for review and comment relating to the Cx process. Assist in resolving any discrepancies.

3.10.19 Witness/verify HVAC piping pressure test and flushing, sufficient to be confident that proper procedures were followed; Verify those present (i.e. Controls Contractor, Mechanical Contractor, A/E, CM, Facility Director, etc.).

3.10.20 Verify any ductwork cleaning and testing in a sufficient manner to be confident that proper procedures as specified by the A/E and the CM's IAQ plan were followed.

3.10.21 Document completion of the construction checklists by reviewing completed construction checklists and CxA selected site observations.

3.10.22 Document systems startup by reviewing start-up reports and by selected on-site observations.

3.10.23 Write the functional performance test procedures customized to the exact equipment and systems approved by the A/E during the submittal process. Include any necessary assistance with installing contractors, no related warranties are to be violated.

- 3.10.24** Coordinate witness and document manual functional performance tests performed by installing contractors. Coordinate retesting as necessary. Coordinate retesting with the CM until satisfactory performance is achieved (see **Section 3.13.1.6.3**).
- 3.10.25** Analyze functional performance trend logs and monitoring data to verify equipment and systems performance.
- 3.10.26** Seasonal Testing:
- 3.10.26.1** The CxA is to utilize and direct the district facility staff to help perform seasonal testing and post occupancy testing, trending and reporting.
- 3.10.26.2** Tests on respective HVAC equipment shall be executed, during both the heating and cooling seasons. However, some overriding of control values to simulate conditions shall be allowed but will not replace testing under actual conditions.
- 3.10.27** Testing and Balancing:
- 3.10.27.1** Verify air and water systems balancing by reviewing completed reports, by spot testing, and by selected on-site observations.
- 3.10.27.2** Check portions of the Testing and Balancing (“TAB”) service for air and water HVAC systems and verify with the CxA’s own in-house or subcontracted equipment and technicians.
- 3.10.27.3** Verify, test, and inspect the TAB fieldwork phase of the project. CM to verify the proper distribution of all TAB-generated Deficiency Reports. Randomly verify the validity of returned deficiency reports to verify that the corrections have been made.
- 3.10.27.4** Assist in the TAB follow-up on uncorrected deficiency items and items inaccurately reported as having been corrected.
- 3.10.27.5** Review, verify, and comment on the final TAB report with the A/E’s signature.
- 3.10.28** Electrical: Perform thermographic imaging of the electrical system panels, switchgear, and critical equipment and connections.
- 3.10.29** Maintain a master issues log and separate record of functional testing. Report all issues as they occur directly to the CM with duplicate copies to the Owner. Report all issues to the Owner at regularly scheduled meetings or as necessary or otherwise directed. Provide written progress reports and test results observations and recommended actions to the CM.
- 3.10.30** Review all commissioned equipment warranties.
- 3.10.31** Review and verify the O&M manuals for commissioned equipment.
- 3.10.32** Review and verify the planning, content and completeness of the contractor-provided training of the SD’s operations personnel as related to the facility new equipment and systems; CxA is not required to attend all training classes.
- 3.10.33** Include all Cx related trending into the Cx plan. Establish data trend logging and reporting for monitoring the performance of the systems and facility from systems installation through a one-year period and/or a full year cycle of seasonal change. This includes, but is not limited to, building controls system control points and energy/ performance measurement points and standards as established by the A/E, loop tuning of primary/critical equipment and systems, energy consumption (ENERGYSTAR’s *Portfolio Manager*); CxA to review, verify and report as a minimum at the six- and eleven-month post-construction periods.
- 3.10.34** Systems Manual. Compile a Systems Manual that consists of the following:
- 3.10.34.1** OPR (by Owner, A/E, CxA)
- 3.10.34.2** Design narrative and BOD (by A/E)
- 3.10.34.3** CxA narrative of the above items .1 and .2
- 3.10.34.4** Performance Metrics, if completed during design; space and use descriptions, single line drawings and schematics for major systems (provided by A/E), control drawings, sequences of control (provided by contractor), and a table of all set-points and implications when changing them, schedules, instructions for operation of each piece of equipment for emergencies, seasonal adjustment, startup and shutdown (provided by A/E and Contractor).
- 3.10.34.5** Document instructions for energy savings operations and descriptions of the energy savings strategies in the facility as related to the designed intent as provided by the A/E.

3.10.34.6 A complete set of reproducible drawings indicating as-built conditions of all systems including but not limited to automatic temperature controls schematics, piping, ductwork, electrical systems, lighting and lighting controls systems and equipment incorporating all changes made during construction; provided by the A/E, Contractor, and CM and reviewed by the CxA. Documents and drawings must be reviewed and approved by the A/E.

3.10.34.7 A Preventive Maintenance / Re-commissioning (“RCx”) Plan and recommendations for RCx

3.10.34.8 Energy tracking recommendations, also to include ENERGYSTAR’s *Portfolio Manager*

3.10.34.9 Recommend standard energy and systems performance trend logs with a brief description of what to look for in them (all by CxA).

3.11 Correction Period

3.11.1 Provide required opposite season or deferred testing and deficiency corrections if required and provide the final testing documentations for the Cx Record and O&M manuals.

3.11.2 Verify controls sequence and operation remain functioning consistent with design and operational intent and that drift has not occurred.

3.11.3 Return to site for the eleven-month walk-through and review with facility staff the current building operation and the condition of outstanding issues related to the original and seasonal Cx. Interview facility staff and identify problems or concerns they have with operating the building as originally intended. Review trend data and other relevant documentation and reports. Make suggestions for improvements and for recording these changes in the O&M manuals.

3.11.4 Review the approved facility maintenance plan for inclusion established ongoing trending procedures and of RCx.

3.11.5 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.

3.11.6 Building Envelope: Perform thermal graphic imaging of the building envelope including the roof, roof to wall assembly, doors and windows. The thermographer must hold at least a Level II Thermographer Certification and have at least three years relevant practical experience

3.11.7 Seasonal Testing:

3.11.7.1 The CxA is to utilize and direct the district facility staff to help perform seasonal testing and post-occupancy testing, trending and reporting.

3.11.7.2 Tests on respective HVAC equipment shall be executed, during both the heating and cooling seasons. However, some overriding of control values to simulate conditions shall be allowed but will not replace testing under actual conditions.

3.12 Reporting Guidelines

3.12.1 The CxA is expected to report all progress and events in an efficient and timely manner. Reporting frequency may vary according to the project status and Cx work performed. The reporting must be (but is not limited to) to the CM. The CM is responsible for the proper and timely distribution of documents, reports, and other correspondences to the Project Team, including:

3.12.1.1 Owner’s Design Intent

3.12.1.2 A/E Project Basis of Design

3.12.1.3 Design Phase’s Cx Reports

3.12.1.4 CxA narratives of the OPR

3.12.1.5 Construction Stage Cx Reports at appropriate intervals per Cx plan and 100 percent completion

3.12.1.6 Energy Model Review

3.12.1.7 Monthly Cx Status Report starting at the functional testing phase

3.12.1.8 Periodic Issues Database Report

3.12.1.9 Functional Testing Phase Reports by System

3.12.1.10 Seasonal Testing and Ten-Month Report

3.12.1.11 Compiled Owner Systems Manual

3.12.1.12 Final Cx Report including Narratives (Closeout)

3.12.2 Commissioning Record.

3.12.2.1 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 CxA regarding the adequacy of the equipment and systems, documentation, and training meeting the contract documents in the following areas:

- .1 Owners Project Requirements
- .2 A/E's Design Intent, Basis of Design
- .3 Equipment meeting the equipment specifications
- .4 Equipment installation
- .5 Functional performance and efficiency
- .6 Equipment documentation
- .7 Operator training

3.12.2.2 All outstanding non-compliance items shall be specifically listed. Recommendations for improvement to equipment or operations, future actions, Cx 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.

3.12.2.3 Issues log, Cx plan, progress reports, submittal and O&M manual reviews, training record, test schedules, construction checklists, start up reports, functional tests and trend log analysis.

3.12.3 OFCC Report. Provide to OFCC a brief commentary on issues related to the OFCC construction process and OSDM in an issue/recommendation/resolution format. This report is delivered separately from the Project Cx log/report. This report is to be delivered at least at the end of the Cx process and near the delivery of the Cx final report.

3.13 Functional Testing and Sampling

3.13.1 The CxA will identify the testing process and what is to be tested (i.e., critical, primary, noncritical).

3.13.1.1 CxA will complete functional tests of system components as previously described.

3.13.1.2 All critical and primary systems shall be tested.

3.13.1.3 Functional testing of all equipment and systems to be Cx will include but not be limited to verifying proper operation of systems, checking for calibration of all sensors and controls, commanding damper and valve actuators fully opened and closed, observing responses, verify that all systems and devices go to their fail safe position upon shutdown, verify that standby equipment properly operate upon loss of primary devices or power, and verify that the various control loops have been tuned and operate according to the sequence of operation and the A/E's designed intent.

3.13.1.4 The functional testing of automatic control systems will also include but not be limited to a checkout of required graphics programming, review of the programming for compliance with the sequence of operation, and analysis of trend data for proper systems response and loop stability.

3.13.1.5 Lighting and Acoustics:

- .1 Classroom and office lighting and noise level testing to be accordance with the OSDM and A/E specifications.
- .2 The Owner is to be trained to conduct basic classroom lighting and noise level testing. The Owner will independently survey all classrooms. The CxA will review the Owner-generated report. This Owner survey does not replace or eliminate any contractor or A/E requirement or obligation.
- .3 Light levels to be tested under daytime and nighttime conditions in the 20 percent estimated worse case classroom and offices to ensure visual comfort and light levels.
- .4 Multiple identical pieces of equipment of non-life safety or non-critical equipment may be functionally tested using a sampling strategy.
- .5 Performance tests shall include testing for maximum background noise as defined by the OSDM. Tests are to be taken in 20 percent of estimated worst-case instructional spaces.

3.13.1.6 Testing and Balancing:

- .1 Randomly test at least 10 percent of estimated worst-case final TAB report data for each group of identical equipment.
- .2 The sample set must not be smaller than three.

- .3 If 10 percent of the sample group fails a second group of 10 percent shall be selected and tested. If the second test fails then the whole group fails. The TAB agency shall be liable for retesting a part or all of the specific HVAC systems before undergoing further performance verification.

3.13.1.7 Controls:

- .1 Verify contractor control input/output (“I/O”) point-to-point (“PTP”) termination. Use random statistical sampling; by testing at least ten percent of the estimated worst-case or most critical points.
- .2 All controls will be randomly tested for correct I/O PTP terminations. All invalid PTP terminations shall be corrected. Any specific control system having more than 5 percent invalid PTP terminations shall be completely rechecked by the controls contractor.

3.13.1.8 General: If at any point, frequent failures are occurring or necessary work remains incomplete or unattended and testing is becoming more troublesome and more than verification, the CxA will stop and immediately inform the CM The responsible subcontractor will be required to perform and document a checkout of all the remaining units, prior to continuing with the functional testing. The CM must be informed of the Cx progress and will coordinate any initial work and remediation. Excessive retesting and verification may be considered additional service of the CxA.

ARTICLE 4 - ADDITIONAL SERVICES

4.1 General Requirements

4.1.1 Services Not Included in Basic Services.

4.1.1.1 The CxA shall provide Commissioning of systems not listed in **Article 3** as Additional Services only when identified in the **Agreement Form** or otherwise approved in writing by the Owner.

4.1.1.2 The services listed in the **Agreement Form** shall be paid as provided in this Agreement, in addition to payment for the Basic Services; however, the CxA shall not be compensated for any Additional Services made necessary by any act or omission of the CxA or any of the CxA’s Consultants.

4.1.1.3 Unless waived by the Owner in writing, authorization to provide Additional Services must be obtained prior to providing the Additional Services.

END OF DOCUMENT

STATEMENT OF QUALIFICATIONS

PART I – CONTRACT SPECIFIC QUALIFICATIONS

A. CONTRACT INFORMATION

1. PROJECT TITLE AND LOCATION (City and County)
 Districtwide Improvements Project
 Various Locations

2. ANNOUNCEMENT DATE

B. FIRM POINT OF CONTACT

4. PROJECT REPRESENTATIVE NAME AND TITLE

5. PRESIDENT / CEO

6. NAME OF FIRM (LEGAL NAME ON FILE WITH THE OHIO SECRETARY OF STATE)

7. TELEPHONE NUMBER

8. FAX NUMBER

9. E-MAIL ADDRESS

10. COUNTY

11. FTID NUMBER

12. WEB ADDRESS

C. PROPOSED TEAM

(Complete this section for the lead firm or joint venture partners, and all key consultants.)

(Check)				13. FIRM NAME	14. ADDRESS	15. ROLE IN THIS CONTRACT
Lead Firm	JV Partner	Consultant				
a.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office ___ Miles from project site	
b.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office	
c.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office	
d.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office	
e.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office	
f.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Check if EDGE certified	<input type="checkbox"/> Check if branch office	

D. ORGANIZATIONAL CHART OF PROPOSED TEAM

(Attached)

INSERT ORGANIZATIONAL CHART BELOW OR ATTACH.

E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT

(Complete one Section E for each key person. Limit one page per person)

16. NAME	17. ROLE IN THIS CONTRACT	18. YEARS EXPERIENCE	
		a. TOTAL	b. WITH CURRENT FIRM
19. FIRM NAME AND LOCATION (City and State)	20. EDUCATION (Degree and Specialization)	21. CURRENT OH PROF REGISTRATIONS (List Discipline)	
22. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.)			

23. RELEVANT PROJECTS (Up to a maximum of 5 samples)

a.	(1) Title, Client & Location (City, State)	(2) Building Type, Size & Project Cost / Performance	(3) Type of Construction, Delivery Model & Services	(4) Date Completed		(5) Example Project Key No.
				Design	Construction	
	(6) Role (Benefit / Value to Client) <input type="checkbox"/> Check if project performed with current firm					
b.	(1) Title, Client & Location (City, State)	(2) Building Type, Size & Project Cost / Performance	(3) Type of Construction, Delivery Model & Services	(4) Date Completed		(5) Example Project Key No.
				Design	Construction	
	(6) Role (Benefit / Value to Client) <input type="checkbox"/> Check if project performed with current firm					
c.	(1) Title, Client & Location (City, State)	(2) Building Type, Size & Project Cost / Performance	(3) Type of Construction, Delivery Model & Services	(4) Date Completed		(5) Example Project Key No.
				Design	Construction	
	(6) Role (Benefit / Value to Client) <input type="checkbox"/> Check if project performed with current firm					
d.	(1) Title, Client & Location (City, State)	(2) Building Type, Size & Project Cost / Performance	(3) Type of Construction, Delivery Model & Services	(4) Date Completed		(5) Example Project Key No.
				Design	Construction	
	(6) Role (Benefit / Value to Client) <input type="checkbox"/> Check if project performed with current firm					
e.	(1) Title, Client & Location (City, State)	(2) Building Type, Size & Project Cost / Performance	(3) Type of Construction, Delivery Model & Services	(4) Date Completed		(5) Example Project Key No.
				Design	Construction	
	(6) Role (Benefit / Value to Client) <input type="checkbox"/> Check if project performed with current firm					

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT

24. EXAMPLE PROJECT KEY NUMBER (1 – 10)

(Present as many projects as requested by the Contracting Authority, or a maximum of 10 projects, if not specified. Complete one Section F for each project. Limit one page in length.)

25. TITLE AND LOCATION <i>(City and State)</i>	26. YEAR COMPLETED	
	DESIGN (if applicable)	CONSTRUCTION (if applicable)

27. PROJECT OWNER'S INFORMATION

a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT PHONE NUMBER	d. POINT OF CONTACT E-MAIL ADDRESS
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28. DESCRIPTION OF PROJECT *(Include project info, services, benefit/value, results, relevance, references, photographs/diagrams, awards/certifications, team members)*

29. FIRMS FROM SECTION C INVOLVED WITH THIS PROJECT

a.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE / RELATIONSHIP
b.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE / RELATIONSHIP
c.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE / RELATIONSHIP
d.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE / RELATIONSHIP
e.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE / RELATIONSHIP
f.	(1) FIRM NAME	(2) FIRM LOCATION <i>(City and State)</i>	(3) ROLE / RELATIONSHIP

F. RELEVANT PROJECT EXPERIENCE MATRIX

		Major Scope of Work requirements as identified in the project advertisement.											
		Scope:	Scope:	Scope:	Scope:	Scope:	Scope:	Scope:	Scope:	Scope:	Scope:		
Example Project Name (Place "X" under Project Scope)													
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													

H. ADDITIONAL INFORMATION

34a. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE CONTRACTING AUTHORITY. ATTACH ADDITIONAL SHEETS AS NEEDED.

34b. PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE CONTRACTING AUTHORITY. ATTACH ADDITIONAL SHEETS AS NEEDED.

PROPOSER AFFIRMATION AND DISCLOSURE

The Lead Firm or Joint Venture (“Proposer”) acknowledges that by signing this Statement of Qualifications, that it affirms, understands, and will abide by the requirements of Executive Order 2019-12D. If awarded a Contract, the Proposer affirms that both the Proposer and its Consultants and Subcontractors (as applicable) shall perform no services requested under the Contract outside of the United States.

The Proposer shall provide the locations where services under the Contract will be performed in the spaces provided below or by attachment. Failure to provide this information as part of its Statement of Qualifications will cause the Proposer to be deemed non-responsive and no further consideration will be given to its Statement of Qualifications. If the Proposer will not be using Consultants or Subcontractors, indicate “Not Applicable” in the appropriate spaces.

- 1. Principal business location of the Proposer:

Address City, State, Zip

- 2. Location where services will be performed by Proposer:

Address City, State, Zip

Locations where services will be performed by Consultants and Subcontractors:

Address City, State, Zip

Address City, State, Zip

Address City, State, Zip

Address City, State, Zip

- 3. Location where state data will be stored, accessed, tested, maintained, or backed-up, by Proposer:

Address City, State, Zip

Locations where state data will be stored, accessed, tested, maintained, or backed-up by Consultants and Subcontractors:

Address City, State, Zip

Address City, State, Zip

Address City, State, Zip

Address City, State, Zip

