

REQUEST FOR PROPOSAL

Huffman Keel Partners, Inc. (HKP), on behalf of Downers Grove Grade School District 58 (DG58) is seeking proposals from qualified Commissioning Consultants to provide services outlined in this RFP.

General Information

The Downers Grove Grade School District 58 (DG58) serves approximately 5,000 students in 11 neighborhood elementary schools, two middle schools, one preschool program (at two locations), one administrative building and one service center.

DG58 is looking for a qualified partner(s) to provide commissioning services in relation to work being performed at the 11 elementary schools and both middle schools.

This Request for Proposal (RFP) is to obtain information and qualifications from firms interested in contracting with DG58 to provide the services described in this RFP.

DG58 looks to operate safe, all-accessible, energy-efficient facilities that promote sustainable learning and are also welcoming to visitors and the surrounding community. This RFP looks to evaluate facility improvements that will modernize facilities while improving safety, security, space utilization, and technology. Modifications will be efficient and cost-effective while looking at potential accommodation for increased growth in the total student population.

The successful proposer will be engaged in basic MEP design review and in provision of on-site services during the various construction phases. All commissioning documentation and close-out activities are to be complete within one month of the scheduled construction phase completion dates.

A. Instructions for Proposal

Proposals are required in digital PDF form sent electronically. Failure to provide all requested information from the requirements outlined below may result in disqualification. Proposals received after the date noted above may not be considered. Please do not contact anyone other than the people on the list below with questions. Questions arising during the bid period should be directed to the full list:

Submit questions and digital proposals to:

Michael Huffman, mhuffman@huffmankeel.com

Kevin Barto, kbarto@dg58.org

B. Background

DG58 passed a \$179m referendum funding renovations to 11 existing elementary schools, and for renovations and new additions at two middle schools. The program scope is to alter, repair and equip these existing buildings, improve sites, and build and equip additions, including improving safety and security, replacing plumbing, electrical, roofs and HVAC systems, updating classrooms, science labs and libraries, improving energy efficiency, and increasing accessibility under the Americans with Disabilities Act.

Individual Projects Include:

- Herrick and O’Neill Middle Schools additions; Renovations at both middle schools
- Elementary school project renovation work at 11 locations

It is anticipated that the middle school additions/ renovation/ construction work will start in Spring of 2024 and will continue into 2026, with multiple turnover phases. The elementary school work will be divided into four schools for summer of 2024, four schools for summer of 2025, and three remaining schools in the summer of 2026. Responses to this RFP are to include sufficient time and effort to cover these multi-phased projects.

DG58 is committed to commissioning the schools to systematically optimize the building and fully integrate ancillary systems so that they operate efficiently and effectively in accordance with the Owner’s Project Requirements, and that the district staff has adequate system documentation, and training. It is the intent of DG58 to ensure that the fundamental systems are calibrated and operating as required to deliver functional and efficient performance.

C. RFP Schedule

- 7/20: Request for Proposals distributed
- 7/28: Questions due
- 8/1: Addendums based on questions posted
- 8/3: RFP responses due by 5pm
- 8/4 - 8/7: RFP evaluations
- 8/8: Recommendation to Board

D. Scope of Services to be provided

The selected Commissioning Consultant (CxA) will provide the Scope of Services for two (2) multi-phase middle school renovation and addition projects and eleven (11) elementary school renovation projects (4 in 2024, 4 in 2025, 3 in 2026).

CxA will be expected to provide limited services during the various design phases.

Design Phase Commissioning

1. CxA will review and compare the OPR to Design Team’s BoD documents for completeness and provide comments and recommendations to the respective authors.
2. CxA will actively participate in up to ten (10) design/big room meetings to provide commissioning insight and gather project information to improve both the overall project and the commissioning process.
3. CxA will review the 50% Construction Documents (CD) for the two Middle Schools and the 50 or 100% Design Development (DD) phase documents for the elementary schools. The CxA will utilize the OPR and/or BoD, and their experience as a guideline that design is optimized and compliant. The CxA will report their review comments findings and possible enhancement recommendations to Owner, CM, and Design Team and will back-check these review comments in the subsequent design submissions.
4. CxA will perform a 75% CD document review and report their review comments findings for continued compliance to OPR, BoD, and prior design submission response resolution to Owner, CM, and Design Team. The CxA will back-check the responses for closure. An Owner/CM/Cx/ Design Team meeting will be scheduled at the end of this review process for overall team awareness and closure of all comments and responses.
5. The CxA will work with Owner and Design Team to generate project specific commissioning specifications to be coordinated with and integrated into the project manual specifications; a Cx specification review meeting can be used to provide consensus of insertion of these section(s) into the Architect/Design Team produced specification.

6. CxA will provide refined sample Construction Verification Checklists and Functional Performance Test forms for inclusion into the project manual specification. These documents refinement will progress as the design progresses and submittals are provided.

The selected Commissioning Consultant (CxA) will be expected to provide all services required for document preparation, record and administrative oversight required during the project's construction phase and acceptance phase.

Pre-Commissioning Phase Scope

7. Prepare a commissioning plan and conduct a scoping meeting where the commissioning process is reviewed. CxA will schedule additional meetings, as necessary, throughout project phases to plan, scope, coordinate, and schedule future activities and resolve problems. The CxA shall utilize ASHRAE Guideline 0-2013 and/or ASHRAE Standard 202-2018 as the basis for the project specific Commissioning (Cx) Plan. The Cx Plan shall contain, but is not limited to, a narrative indicating the commissioning processes, Owner's Project Requirements (OPR) (if available), the Designer's Basis of Design (BOD) documents (if available), and a design/construction schedule. The Cx Plan shall also incorporate Site Visit Reports, Issues Lists, Functional Performance Testing (FPT) documentation, field notes, contractor startup and test reports, and archived meeting minutes.
8. The CxA will generate system-specific Functional Performance Testing (FPT) documents for the specified systems from information gathered from plans and specifications, addendums, construction bulletins, field orders, and A/E reviewed shop-drawings.
9. Review construction contractor submittals, which are applicable to systems being commissioned, concurrently with review by the Design Team (as applicable) to obtain equipment and system information and ensure compliance with commissioning needs and requirements. Advise the PM of any subcontractor's inefficiencies noted that may impact the commissioning execution or intended system performance.
10. As needed, the CxA shall attend regularly scheduled project progress meetings to review trade inter-dependencies, confirm adherence to schedule, plan for functional testing, and discuss issues as a team. Cx Minutes shall be generated by the CxA and distributed for each meeting attended.
11. CxA shall chair at least one (1) Cx onboarded-construction phase Cx kickoff meeting. The meeting's intent is to review the commissioning process (methods, forms, communication, expectations) with the Owner, Architect, Designer, and Construction Team.
12. The CxA shall facilitate six (6) (two per phase; 2024, 2025, 2026) controls/integrations page turn meetings where the designer, mechanical contractor, control contractor, Owner, Owner's staff and the CxA reaffirm detailed control operation between equipment, systems, and disciplines to ensure that controls, control programming, device integrations, and responsibilities are clearly understood by all.
13. Work with the subcontractors in developing start-up plans/test and balancing and start-up documentation formats. The subcontractors will be provided with pre functional checklists to be completed during the startup process.

Commissioning/Construction Phase Scope

14. Review the test and balance (hydronic and air) reports and provide feedback, including confirmation they have completed all start-up forms documentation.
15. To promote efficiency, the CxA shall provide site visits on the same day as the Progress meeting visit with the intent to observe the installation process, report on system status and conditions, review equipment checkout and start-up procedures, review controls coordination and checkout processes. The CxA shall generate and distribute a CxA field observation report after each visit.
16. Ensure that adequate documentation has been provided for operation, preventive maintenance, repair, replacement (OMR&R) manuals and training.

17. Develop the commissioning system/equipment test scripts.
18. The CxA shall review and witness major equipment start-ups and their respective startup reports.
19. The CxA shall provide required site visits relating to functional performance testing. The CxA, with the assistance of the HVAC, Electrical, Controls contractors, and vendors, will witness the Functional Performance Tests (FPT) and document the results of the specified systems. In addition, the CxA will coordinate that testing is completed in a timely manner and will evaluate results against the construction documents for compliance with the design intent. Costs of additional Cx functional testing after two unsuccessful to be back charged to constructors.
20. The CxA shall shadow the Testing and Balancing contractor to sample/review their process for: representative VAV calibration and proportional balancing, representative Unit Ventilator air and water balancing, representative AHU static pressure profile, pump balancing, water system balancing.
21. The CxA shall utilize an "Issues List" to identify "Issues/Deficiencies" as warranted to appropriate parties and will monitor outcome of discipline specific "Issue/Deficiency" on the "Issues List" log via the cloud-based Cx tool.
22. The CxA shall utilize and manage a cloud-based commissioning tool to be the live repository of functional test documents, site visit reports, deficiency lists, startup reports, etc. for all trade partners to utilize (example: contractors uploading an equipment startup sheet). There shall be no cost for any team member (contractors, design team, etc.), other than the Cx Provider, to bear in using this tool.

Post Commissioning Phase Scope

23. The CxA shall work in concert with the CM/GC in the development of MEP training plans that meet owner's needs and specification requirements, participate in the training process using the training plan, documenting the process and confirming that training is adequate to the owner's facility team members.
24. Interview facility staff and identify problems and concerns they have with the operation and maintenance of the Project as originally intended.
25. Make suggestions for improvements and for recording any proposed changes in the O&M manuals. Identify to the Owner those issues whose correction may be covered by equipment and system warranties or by the original construction contract.
26. Assist the facility staff in developing reports and documents and requests for services to remedy outstanding problems.
27. The CxA documents that the checklists and startup were completed according to the approved plans. This may include the CxA witnessing startup of selected equipment.
28. Ensure that items of non-compliance are corrected at the subcontractor's expense and the system re-tested.
29. Complete a Commissioning Report at the completion of the project.
30. The CxA will utilize the "Issues List" to identify "Issues/Deficiencies" found during all phases that are not closed out for any reason to appropriate parties and will monitor outcome of discipline specific "Issue/Deficiency" on the "Issues List" log via clou-based tool.
31. The CxA will facilitate a Lessons Learned workshop / warranty phase review at 10 months into the 12-month warranty period. At this time, problems and concerns and hopefully very minimal open Cx issues can be identified for closure and suggestions for improvements for future consideration can be discussed.
32. Return to the site 10 months after completion and review with facility staff the building operations and the status of outstanding issues related to the original and seasonal commissioning.

Final Documents Consolidated in the Cx Plan/Final Report

33. Insert into the Cx Plan as appendices:
 - a. Executive Summary of the project
 - b. Meeting minutes from commissioning meetings
 - c. Completed startup forms from the MEP contractors
 - d. Functional Performance Testing report result documents acquired from the MEP FPT/Training category

- e. Issues log outcome, including a list of outstanding deficiencies or delayed testing
- f. Develop a Mini Systems Manual to be incorporated into the final commissioning report which would include: system single line diagrams, as-builts of commissioned systems, base setpoints, recommended schedule for maintenance, recommended schedule for re-commissioning, recommended schedule for calibrating sensors and actuators, and more
- g. Lessons learned report acquired from the FPT and Training

Systems to be commissioned:

1. All New Mechanical Systems. Generally including:
 - a. Air Handling/Roof Top Units
 - b. Life Safety Dampers
 - c. Exhaust Fans
 - d. Unit Ventilators
 - e. Fan Coil
 - f. Unit Heaters & Cabinet Unit Heaters
 - g. BAS Monitoring System
 - h. Chillers/Cooling Towers
 - i. Ductless Split Units
 - j. Humidifiers
2. All New Domestic Water/Sewer Systems. Generally including:
 - a. HW Heaters
 - b. Circulation Pumps
 - c. Sump Pumps
 - d. Sewerage Ejectors
 - e. Thermal Mixing valves
3. All New Lighting Controls

E. Proposal Requirements

Proposals must include:

1. Cover Letter
 - a. Letter of Interest
 - b. Provide name of the primary contact person, e-mail address, and telephone
2. Relevant Experience (three examples)
 - a. Briefly describe relevant experience of the proposer's team includes project phasing, life cycle costing, testing, adjusting and balancing, sustainable design incorporation, building simulation, IAQ, public projects, etc. Describe experience in the following areas and list the involvement of key team members.
 - b. Include images and a listing of relevant projects (maximum of three total)
 - c. For each referenced project, please provide:
 - i. Project Title
 - ii. Beginning / Ending dates of Project
 - iii. Total Gross Square Footage
 - iv. Total Construction Cost
 - v. Main Program Elements
 - vi. Owner Primary Contact Person (Name and Telephone Number)
3. Proposed Project Team
 - a. Identify Design Team members representing your firm

- b. Submit a resume for all key staff proposed to work on these Projects
 - c. Summarize proposed roles / responsibilities specific for these Projects
 - d. Provide an Organizational Chart of the proposed Commissioning Team
4. Work Team
- a. Describe your proposed approach to managing the project expertly and efficiently, including distribution of tasks, travel, and duration of which staff will be on site during what periods of time, etc., specifically addressing:
 - i. Projects Approach / Methodology
 - ii. Consultant Communication Plan between Projects Management and Design Teams / General Contractor and Municipal Review and Approval Agencies
 - iii. Documentation Strategy
 - iv. Adherence to project schedule
5. Sample Work
- a. As an attachment, provide the following work products that members of the proposer’s team developed. List the team member who wrote the document and the projects on which they were used. Work from the designated CxA is preferred.
 - b. Commissioning plan that was executed (the process part of the plan); and
 - c. An actual functional test procedure form that was executed.
6. Fee for Services
- a. Provide your fee for the services you will be providing. Include all costs associated with the work involved for the duration of the project. Include a description of any costs that are not included in the table below.

<i>Commissioning Cost Proposal</i>			
Project Phase	# of Hours	Blended Rate/Hr	Approximate Cost
Design Review			
Pre-Cx Phase			
Construction Phase			
Post Cx Phase			
Final Report			
TOTAL			

7. Insurance
- a. Provide an outline of your insurance policies.

F. Proposal Evaluation

RFP responses will be reviewed by DG58 and HKP for project experience, proposed project team, and costs. Upon completion of the selection process, HKP shall notify the vendor of the selection. DG58 reserves the right to reject any or all proposals. Selection will be based upon a determination as to which proposal is in the best interest of DG58.

G. Contract

The successful Vendor will enter into a written contract directly with DG58 for the scope of services to be provided.

H. Additional Information

- a. DG58 may investigate the qualifications of any individual or firm under consideration, require confirmation of information furnished, and require additional evidence of qualifications to perform the services described in this RFP.
- b. DG58 may waive minor irregularities or discrepancies as defined.
- c. DG58 may appoint an evaluation committee to review RFP submittals or responses, make recommendations, and seek the assistance of outside consultants in this RFP submittal evaluation.
- d. DG58 may seek or obtain data from any source that has the potential to improve the understanding and evaluation of the responses to the RFP.
- e. Any and all responses shall become the property of DG58 upon completion and are subject to applicable open records laws.
- f. All proposals must arrive by the due date and time to be considered.
- g. Responding firms will bear all costs associated with the RFP process.
- h. This RFP does not commit DG58 to enter into a contract. DG58 reserves the right to reject any/all submissions, award one contract, award multiple contracts, or delay award of contract(s) beyond the date specified, in response to this RFP.
- i. DG58 may negotiate with contractors after proposals have been submitted. DG58 reserves the right to negotiate on any or all components of each proposal submitted. From the time the proposals are submitted until the formal award of a contract, each proposal is considered a working document and as such will be kept confidential. The negotiation discussions will be held confidential as well until such time as the award is completed.
- j. Proposals must comply with applicable Illinois law including the payment of prevailing wages by all contractors working on public work projects and Criminal Background Investigation. Proposals must comply with the Illinois statutory requirements regarding labor, including equal employment opportunity laws.