



**SAN FRANCISCO UNIFIED SCHOOL DISTRICT (SFUSD)
2016 PROPOSITION A BOND PROGRAM**

REQUEST FOR QUALIFICATIONS (RFQ)
FOR:

COMMISSIONING SERVICES

JUNE 2017

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I. INTRODUCTION TO RFQ SUBMITTAL PROCESS

1. Overview

San Francisco Unified School District (SFUSD) is seeking Statements of Qualifications (SOQ) from qualified firms to provide commissioning services for the 2016 SFUSD Proposition A Bond Program.

Applicants must have experience performing similar services in California public schools and/or community colleges and have an existing business location within a 50-mile radius of the city limits of San Francisco, CA.

District will accept emailed questions from prospective consultants until **Thursday, June 29, 2017**.

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Applicants shall email Statements of Qualifications (SOQ's) by 5:00 PM on Friday, July 14, 2017.

2. Methodology of Contracting for Commissioning Services and Basis of Fees

Fees shall be based on the firm's standard billing rates as submitted in the SOQ and the scope in the contract, negotiated as a fixed fee for the determined work with the selected firm.

3. Commissioning Firm Qualifications

Location

- The submitting firm shall have a major office/principal place of business within 50 miles of the District Office.
- All personnel assigned to SFUSD projects shall reside within 50 miles of the City of San Francisco.

Staff Qualifications

- The submitting firm shall have at least one professional engineer on staff for assistance and guidance in the commissioning process.
- The submitting firm shall have at least one individual with a commissioning certification from either of the following organizations:
 - Building Commissioning Association (CCP designation)
 - American Commissioning Group (CxA designation)
- The submitting firm shall use personnel for SFUSD projects with a minimum of 5 years of commissioning experience and field knowledge.

- The submitting firm shall bring all assigned personnel to an interview for review by SFUSD, if requested.
- Firm shall assign staff with sufficient experience and availability to complete District Commissioning Requirements.

Experience

- The firm shall have extensive project experience with K-12 schools, preferably large, publicly-funded school district.
- The firm shall have experience providing peer MEP design Reviews.
- The firm shall demonstrate extensive field experience and can provide the District with sample documentation for review.
- The firm shall demonstrate experience with the Division of the State Architect (DSA).
- The firm shall describe experience with ZNE and/or high-efficiency educational projects.
- The firm shall describe experience with Distech/tridium controls systems.

4. Description of Commissioning Scope of Services

The 2016 Bond Program includes new school facilities, modernizations of existing facilities, IT upgrades, and Student Nutrition facility improvements. Design work began in May 2017 with all work is scheduled to be completed within six (6) years.

Thanks to its newly adopted *Carbon Reduction Plan*, SFUSD has transformed the process by which it designs, constructs, and modernizes its buildings in order to achieve a carbon neutral district by 2040. The *SFUSD Project Requirements* were created to assist design teams in supporting the District's ambitious zero carbon goals.

Commissioning firms hired by the District will be brought into the design process early on and follow each project through design, construction, and post-occupancy to ensure that design intent is achieved and reflected in the Basis of Design (BOD). Commissioning agents will develop a commissioning plan that includes design reviews, construction inspections, functional and infiltration testing, development of a maintenance manual, and systems training.

The following is a general guideline for the Commissioning Process to be provided for the District on each District project to be awarded under this RFQ. There may be additional project specific tasks, which will be communicated to the selected firms when project-specific pricing is solicited.

While no CHPS or LEED submission is requested by the District, compliance with current T24-2016 Commissioning Requirements is expected. The District also requires additional items that it feels are beneficial for a successful commissioning process.

Commissioned Systems

The following systems will be commissioned as part of this scope of work:

- Heating, Ventilation and Air Conditioning (HVAC)
- Building/Energy Management System (BMS/EMS)
- Indoor lighting systems & controls
- Domestic Hot Water (DHW) systems
- Onsite renewable energy systems
- Irrigation systems, as needed
- Rainwater harvesting systems, as needed
- Emergency Power Systems (EPS), as needed
- Additional systems, as determined by the District

Pre-Design Phase/Programming Requirements

The following items shall be completed prior to commencement of project design:

- Project Assessment – Review the architect’s draft *Project Assessment Narrative* and draft *Project Scope & Cost (PS&C)* document to ensure consistency with the *SFUSD Project Requirements*. The *PS&C* forms the basis for defining and estimating the final design scope. Participate in a meeting with the project team to provide feedback to the District and A/E team.

Design Phase Requirements

The Commissioning Agent shall play a vital role in the design process and facilitate the full design review in collaboration with the A/E team and District. Specific tasks required:

- Owner’s Project Requirements (OPR) – Immediately upon contract execution, develop a project-specific OPR in coordination with the project team that incorporates T24-2016 requirements and aligns with the *SFUSD Project Guidelines*. Update this document at Design Development, Construction Documents, Bid and Project Closeout.
- Basis of Design (BOD) – Review the BOD for alignment to the *SFUSD Project Requirements* at each design review cycle (outlined below). Provide comments to the team for review and response. Back check all comments in subsequent design milestones.
- Design Peer Reviews – Review the design documents, including plans, specifications, Basis of Design, and energy model (new construction) for compliance with the District’s requirements, good engineering practices, and maintenance standards. Participate in design review meetings and maintain a central commissioning comment log.
 - Schematic Design (SD) – No formal CxA review
 - Design Development (DD) – Peer review the DD set and provide comments to the District and A/E Team. Ensure conformance with the OPR and BOD. The A/E team will provide the CxA with written responses and include updates in the 75% CD set.
 - 75% Construction Documents (CD) - Verify that items caught in the DD set have been corrected.
 - Initial DSA Submittal – Conduct full peer review and provide comments to the District

and A/E Team. The A/E team will provide the CxA with written responses and include updates in the DSA Back Check set.

- DSA Backcheck/Bid – Verify that items have been corrected from the DSA submission set. Any ongoing/subsequent issues shall be relayed to the SFUSD project manager and Sustainability Office for possible inclusion in an addendum.
- Controls Meeting - Attend a controls design meeting to review and formulate the controls scope and sequence of operations with the District and design team.
- Commissioning Plan & Lessons Learned Meeting – Formulate a design phase commissioning plan outlining key schedule dates, attendees required at each meeting, and responsibilities of all parties. Reach out to SFUSD staff to gather lessons learned from recently completed projects for inclusion into the plan. The District will schedule the appropriate design professionals and SFUSD parties to attend each meeting.
- Commissioning Specifications – The District will provide standard general commissioning specifications. Amend the specification no later than 100% DD to ensure each is tailored and appropriate for the specific project at hand. All changes shall be tracked and approved by the District.
- Code Forms - Complete and submit the commissioning-related forms for DSA and other regulatory bodies. Respond to all comments.

Construction Phase Requirements

The following tasks are required of the CxA during the Construction Phase:

- Construction Commissioning Plan – Develop a construction commissioning plan for use during the kick-off meeting that will be updated with key schedule information and process updates throughout construction.
- Construction Kick-off Meeting – Facilitate a commissioning kick off meeting with the entire commissioning team including the contractor and relevant sub-contractors. Discuss:
 - Submittal and RFI review process for the entire team
 - Key commissioning milestones including approximate dates for site installation reviews and functional testing durations
 - Commissioning meeting intervals and proposed topics of discussion
 - Commissioning team member roles and responsibilities
- Construction Schedule Review – Review the master construction schedule to ensure commissioning plan activities have been adequately incorporated and provide comments to the contractor and District on any suggested updates.
- Submittal Reviews – Review all commissioned equipment submittals and provide comments to the District and engineer of record for communication to the contractor. Keep a log of these comments, ensure record submittals address commissioning concerns, and confirm that Buildings & Grounds (B&G) comments are being logged.
- RFI Reviews – Review and provide comments on any commissioned system RFI throughout

construction for compliance with the project documents and *SFUSD Project Requirements*.

- Commissioning Meetings – Hold periodic meetings with the project team throughout construction to ensure the schedule is being followed and required commissioning tasks are being completed by the team. Review the master issues log at each meeting. These meetings shall be held in increasing frequency as the project approaches start-up and testing.
- Site Inspection Review – At a minimum, conduct three site inspections with the District to review the current installation and confirm that installed equipment will operate and function as intended. Maintain a master issues log throughout construction (including submittal, RFI, site installation and functional testing items) and review at every commissioning meeting.
- Pre-Functional Checklists – Prepare and provide pre-functional checklists to the team for use during start-up. The pre-functional checklists shall be reviewed and approved by the District and contractor prior to use. The contractor shall use these checklists as part of the start-up process.
- Functional Test Scripts – Develop the functional test scripts and share with the District for approval prior to use. All updates and changes shall be incorporated by the CxA.
- Functional Test Execution – Invite the District to all functional tests. Witness functional test script execution on site and document the results. All commissioned systems with the project scope shall be tested (no sampling). Create site reports and keep an issues log of all items that require resolution. Witness one retest at no additional cost. Revisit the site to complete seasonal testing as necessary and document in the commissioning plan.
- Systems Manual – Provide the District with a systems manual for the operation of the commissioned systems. At a minimum, this manual shall include the O&M manuals, as-built sequences and set points, troubleshooting recommendations, and maintenance requirements for the systems.
- Performance Period / Trend Review – Gather and analyze at least 3 weeks of BMS trend data upon beneficial occupancy. Log any performance issues and bring to the attention of the District. Share all reviewed data directly with the Sustainability Office.
- Training / Transition – The District is focused on implementing a proper transition process from construction to operations. Develop a transition plan in consultation with the District, including a review of O&M manuals and verification of onsite training by the installing sub-contractors. Lead a training session exclusively with District staff to provide lessons learned, results of the functional testing process, and operational fundamentals of the commissioned systems.
- Final Commissioning Report – Provide the District with a final commissioning report summarizing the entire process and include final outstanding items and recommendations for future work.

Post-Occupancy Phase Requirements

The District believes that the Commissioning process should extend into the first year of operations. The CxA shall complete the following warranty-phase tasks:

- Respond and review to issues encountered by B&G staff during the first year of the warranty

period (start date as determined by the District).

- No later than 2 months prior to the end of the warranty period (currently 2 years), review building operations by surveying B&G staff and testing systems of concern to develop an issues log to be addressed by the contractor. Back check these items after completion.
- Organize and complete a lessons learned session with District staff including B&G, Sustainability, and the design team. Communicate and discuss major issues encountered during design and construction and provide feedback to ensure future projects do not make the same mistakes.

5. Insurance Requirements

The Consultant shall procure and maintain at all times it performs any portion of the Services the following insurance with minimum limits equal to the amount indicated below.

- Commercial General Liability and Automobile Liability Insurance. Commercial General Liability Insurance and Any Auto Automobile Liability Insurance that insure against all claims of bodily injury, property damage, personal injury, death, advertising injury, and medical payments arising from Consultant's performance of any portion of the Services. (Form CG 0001 and CA 0001)
- Workers' Compensation and Employers' Liability Insurance. Workers' Compensation Insurance and Employers' Liability Insurance for all its employees performing any portion of the Services. In accordance with provisions of section 3700 of the California Labor Code, the Consultant shall be required to secure workers' compensation coverage for its employees. If any class of employee or employees engaged in performing any portion of the Services under this Agreement are not protected under the Workers' Compensation Statute, adequate insurance coverage for the protection of any employee(s) not otherwise protected must be obtained before any of those employee(s) commence performing any portion of the Services.
- Professional Liability. Professional Liability (Errors and Omissions) Insurance as appropriate to the Consultant's profession.

Type of Coverage	Minimum Requirement
Commercial General Liability Insurance , including Bodily Injury, Personal Injury, Property Damage, Advertising Injury, and Medical Payments	\$ 1,000,000
Each Occurrence	\$ 2,000,000
General Aggregate	
Automobile Liability Insurance - Any Auto	
Each Occurrence	\$ 1,000,000
General Aggregate	\$ 2,000,000
Professional Liability	\$ 2,000,000
Workers Compensation	Statutory Limits
Employer's Liability	\$ 1,000,000

Proof of Carriage of Insurance. The Consultant shall not commence performing any portion of the Services until all required insurance has been obtained and certificates indicating the required coverage's have been delivered in duplicate to the District and approved by the District. Certificates and insurance policies shall include the following:

- A clause stating: "This policy shall not be canceled or reduced in required limits of liability or amounts of insurance until notice has been mailed to the District, stating date of cancellation or reduction. Date of cancellation or reduction shall not be less than thirty (30) days after date of mailing notice."
- Language stating those insured, extent of insurance, location and operation to which insurance applies, expiration date, to whom cancellation and reduction notice will be sent, and length of notice period.
- An endorsement stating that the District and the State and their representatives, employees, trustees, officers, and volunteers are named additional insureds under all policies except Workers' Compensation Insurance, Professional Liability, and Employers' Liability Insurance. An endorsement shall also state that Consultant's insurance policies shall be primary to any insurance or self-insurance maintained by District.

- All policies shall be written on an occurrence form, except for Professional Liability which shall be on a claims-made form.
- Acceptability of Insurers - Insurance is to be placed with insurers with of no less than A: VII, unless otherwise acceptable to the District.

II. PROCESS FOR CONSULTANT SELECTION

The District wishes to create a pool of Commissioning Firms to which it can assign specific projects. All SOQs will be scored through a preliminary screening process which will include Part III below. Reference checks and interviews will only be conducted if deemed necessary by SFUSD.

III. CONTENTS AND REQUIRED FORMAT OF PROPOSALS AND EVALUATION CRITERIA

Firms should submit a Statement of Qualifications (SOQ) that meets the following guidelines:

**LENGTH OF PROPOSAL/SUBMITTAL:
10 pages MAX (excluding Work Samples)
PDF (not printed), 11 pt. font
Maximum Points Possible: 100**

Please provide the following information in the order given below, **RIGIDLY** sticking to the page limits given (each page is one side of a standard 8.5" x 11" sheet of paper):

1. Cover Page (1 page max)
 - a. Introduction to firm
 - b. Confirmation of review and inclusion of RFQ addendum (if any)
 - c. Signed by company officer authorized to enter into an agreement with the District
2. Firm Profile and Staffing (2 pages max)
 - a. Name of firm's project lead should firm be selected
 - b. Full name and address of firm (office must be within 50 miles of District Office)
 - c. Summary of firm services
 - d. Firm organization chart/project personnel chart
3. Commissioning Approach (2 pages max)
 - a. Provide your firm's approach to the commissioning process (design/construction)
 - b. Highlight your training and transition approach
 - c. Provide a sample staffing plan for your approach
4. Representative Experience (2 pages max)
 - a. Describe your firm's experience working with K-12 public schools and the Division of the State Architect, developing and implementing commissioning plans, conducting MEP design reviews, and working on ZNE/high efficiency projects

- b. Provide a list of past projects (w/contacts and brief descriptions) representing similar (scope/type/client) work conducted by your firm over the past five (5) years
- 5. Personnel Resumes (2 pages max)
 - a. Provide staff resumes assigned to District projects
 - b. Identify project roles for each staff member assigned to the team
 - c. Clearly identify staff with PE and/or commissioning certifications
 - d. Provide the firm's process for replacing staff on this project after award (the District can reject/replace any personnel it deems unqualified to perform work under this contract)
- 6. Billing Rates & Fees (1 page max)
 - a. Provide billing rates for core project team staff identified in Item #5 (above)
- 7. Insurance (1 page max; does not count against page total)
 - a. Provide a copy of your firm's current insurance coverage as issued by your Insurance Carrier that meets minimum District requirements (see section I.5)

IV. RFQ SCHEDULE (Subject to change)

- Post RFQ to District website: **June 21, 2017**
- Written questions accepted until: **June 29, 2017**
- Addenda posted to website by: **June 30, 2017**
- **PROPOSALS DUE NO LATER THAN:** **July 14, 2017 at 5 PM**
- Final notification: **July 28, 2017**

NOTES

- **The District reserves the right, at its sole discretion, to modify RFQ requirements, amend the schedule, and/or dispense with interviews if selection can be made based upon written SOQs received.**
- Firms responding to this RFQ shall not be reimbursed for any costs associated with the preparation of their SOQ.
- SFUSD may confirm the accuracy of all information submitted in response to this RFQ.

V. SCORING SHEET

Evaluation Criteria (Total Points – 100)	Points	Score
1. Cover Page (1 page max)	10	
<ul style="list-style-type: none"> a. Introduction to firm b. Confirmation of review and inclusion of addendum c. Signed by company officer 		
2. Firm Profile & Staffing (2 pages max)	10	
<ul style="list-style-type: none"> a. Project lead, name, and address of firm b. Summary of services c. Firm org chart/project personnel chart 	<i>Poor: 0-3</i> <i>Acceptable: 4-7</i> <i>Exceeds: 8-10</i>	
3. Commissioning Approach (2 pages max)	20	
<ul style="list-style-type: none"> a. Commissioning approach b. Training and transition approach c. Sample staffing plan 	<i>Poor: 0-7</i> <i>Acceptable: 8-15</i> <i>Exceeds: 16-20</i>	
4. Representative Experience (2 pages max)	20	
<ul style="list-style-type: none"> a. Experience with K-12, DSA, design reviews, commissioning, and ZNE b. List of past projects (5-8) 	<i>Poor: 0-7</i> <i>Acceptable: 8-15</i> <i>Exceeds: 16-20</i>	
5. Personnel Resumes (2 pages max)	20	
<ul style="list-style-type: none"> a. Staff resumes b. Project roles c. PE and/or Cx certifications d. Process for replacing staff 	<i>Poor: 0-7</i> <i>Acceptable: 8-15</i> <i>Exceeds: 16-20</i>	
6. Billing Rates and Fees (1 page max)	10	
7. Insurance (1 page max)	10	