December 4, 2017

Re: Request for Proposals- Testing, Adjusting, and Balancing Services
Bowen Science Building – Renovate 1-500 Lab and Offices (UI# 0585701)
University of Iowa

The University of Iowa, located in Iowa City, Iowa, seeks a qualified firm to provide Testing, Adjusting, and Balancing Professional Services (TAB) in accordance with the contract documents. Qualified Testing, Adjusting, and Balancing firms, hereafter referred to as Consultant, are invited to submit a proposal based on the scope of services described below.

A. Statement of qualifications. It is the Owner’s intent that the Consultant and the key staff members, exhibit the following:

1. Consultant:
   a. Have a minimum of ten (10) years of related consulting and management experience.
   b. Be AABC or NEBB accredited.

2. Project Manager: This person shall:
   a. Have a minimum of five (5) years of related field and management experience
   b. Be AABC or NEBB accredited.

3. Field Technician: This person shall:
   a. Have at least five (5) years of related field experience.

B. Proposal Submission

1. Respondents’ proposals are due no later than 2:00 pm on December 20, 2017. Combine all requested materials in a single *.pdf file format.

2. Submit electronically to both of the following:
   a. facilities-dcs@uiowa.edu
   b. daniel-cassidy@uiowa.edu

C. Proposal Requirements. The Consultant shall:

1. Provide a written proposal on the University of Iowa Letter of Proposal form found on the University's Facilities Management/Consultants web site at http://www.facilities.uiowa.edu/pdc/consultants/agreement-form.html. Please note that a wet signature is not required as part of this submittal.

2. Provide an organizational chart indicating proposed Project Manager, Field Technician(s) and other team members.

3. Provide resumes for key staff members.
4. Briefly describe each proposed team member’s relevant experience and direct involvement in similar projects.

5. Describe proposed approach to managing this project.


7. Provide pricing information in the following format:

<table>
<thead>
<tr>
<th>Phase</th>
<th>Fee Amount</th>
</tr>
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<tbody>
<tr>
<td>Phase 1</td>
<td>$</td>
</tr>
<tr>
<td>Phase 2 &amp; 3</td>
<td>$</td>
</tr>
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D. Proposal Evaluation and Award

1. The Owner will consider and evaluate the following proposal components:
   a. Consultant experience and qualifications.
   b. Project Manager and Technician qualifications and accreditations.
   c. Key support personnel experience and qualifications.
   d. Project approach.
   e. Consultant location.
   f. Proposal quality.
   g. Proposed fee.

2. The Owner reserves the right to negotiate and accept any proposal, or to reject all proposals, and to offer to accept any proposal subject to the deletion of any item or group of items of work from the scope of work.

3. The Consultant shall be prepared to attend an interview as part of the evaluation process. The Consultant shall bear all costs associated with preparing the RFP and subsequent interviews.

4. Award will be made via the University of Iowa Special Services Agreement located at [http://www.facilities.uiowa.edu/pdc/consultants/agreement-form.html](http://www.facilities.uiowa.edu/pdc/consultants/agreement-form.html)

Should you have questions or comments, please contact:

**Daniel Cassidy**  
Construction Manager  
University of Iowa  
FM - Planning, Design & Construction  
200 University Services Building  
Iowa City, Iowa 52242-1922  
daniel-cassidy@uiowa.edu

**Description of Services**

A. Provide services to perform Testing, Adjusting, and Balancing (TAB) for HVAC Professional Services in accordance with Bid Documents, including Specification Sections listed, but not limited to:

<table>
<thead>
<tr>
<th>Description</th>
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<tbody>
<tr>
<td>00 73 13 Institution Requirements</td>
</tr>
<tr>
<td>00 74 13 Project Requirements</td>
</tr>
<tr>
<td>11 53 10 Fume Hoods</td>
</tr>
<tr>
<td>23 05 93 Testing, Adjusting, and Balancing for HVAC</td>
</tr>
<tr>
<td>23 09 00 Direct Digital Control System</td>
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</tbody>
</table>
B. Additional services to be provided are:
   1. It is the TAB agency’s responsibility to post all changes, RFI, ITC, etc. that affect this scope of work to the contract documents. Keep a posted set at all times for use by field and office staff. These documents will be distributed electronically via Build UI.
      a. Consultant shall check room conditions in front of fume hood using a thermal anemometer and a smoke source to verify that the velocity of cross drafts does not exceed 20% of the specified average fume hood face velocity. Eliminate cross drafts that exceed these values before proceeding.
      b. Consultant shall perform a flow visualization test on each new or relocated hood.
      c. Consultant shall perform and document the Face Velocity tests on each new or relocated fume hood.
   3. The Consultant should expect to perform final air and hydronic system balancing of all scope required devices prior to each phase achieving Substantial Completion.

C. Work not included: None

D. For intent of this submittal, Consultant should assume that work under this project will be performed six (6) days per week, Monday through Saturday.

E. Attendance at biweekly progress meetings will be required.

F. The Consultant shall actively participate as a critical member of the project team.

G. The Consultant shall actively participant in the contractor’s schedule meeting to provide schedule activities and durations for its scope of work to be included in the Constructor’s milestone schedule. Consultant shall coordinate services so as not to impede the Constructor’s milestone schedule.

H. Any deficiencies noted during testing and inspections shall be verbally reported to the Constructor’s appointed representative before leaving the site. Document all deficiencies in the Consultant’s daily report(s).

I. Consultants shall provide their own ladders, lifts, equipment, and personal protective equipment (PPE) as required for safe work. Consultants will provide their own electronic devices and software for accessing the Building Automation System.

J. Within 90 days of completing TAB, perform additional testing, adjusting, and balancing to verify that balanced conditions are being maintained throughout and to correct unusual conditions.

K. The Consultant shall use Submittal Exchange to access submittals and deposit daily field logs, observation and final balancing reports for this project.
L. The University will provide an on-line, secure project communications web site for use by the Owner's Representative, Design Professional and Contractor as the major method of communicating and storing contract change document information. This web site will be used to communicate request for information (RFI), and instructions to contractor (ITC).

M. Conflicting Requirements:
   1. If compliance with two or more standards is specified and standards establish different or conflicting requirements for minimum quantities or quality levels, comply with the most stringent requirement; refer uncertainties and requirements that are different, but apparently equal, to Owner's Representative for a decision before proceeding.
   2. Minimum quantity or quality levels: Quantity or quality level shown or specified shall be minimum provided or performed; actual installation may comply exactly with minimum quantity or quality specified or it may exceed minimum or maximum, as appropriate, for context of requirements.

N. Limits of authority:
   1. The Consultant may not waive or alter Contract requirements or approve or accept any portion of Work unless specifically authorized by Owner or Design Professional.

Listing of Deliverables

A. Documentation: Submit the following reports to the Owner, Design Professional, Commissioning Agent, and Constructor.
   1. Written Testing, Adjusting and Balancing Plan coordinated to support job progress via joint review and periodic update with the project team.
   2. Current calibration certificates for all equipment used to perform work.
   3. Copy of daily field report(s) documenting the work progress and location and description of any deficiencies or issues encountered while performing work.
   4. Deficiency log maintained and updated weekly to allow for tracking of open deficiency items.
   5. Draft TAB report for DP review (electronic copy)
   6. Final TAB Report (one hard copy and one electronic copy)

Listing of Project Information

A. Project Description
   The project will convert existing Bowen Science Building storage and lab space in the 1-500 area. Work includes all scope as outlined in this RFP as well as the construction drawings and specifications issued for bid including all addenda.

B. Project Construction Budget
   1. $2,400,000.00

C. Design Firm
   1. Shive-Hattery

D. Documents
   2. To review the current documents, please send an e-mail request to:
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a. facilities-dcs@uiowa.edu
b. The e-mail must include the subject line: 0548201 – BSB | 1-500 TAB RFP document review request

E. Schedule:
   1. The project is currently out for bid. The tentative Phase Substantial Completion dates are as follows:
      a. Phase 1: March 1, 2018
      b. Phase 2: August 10, 2018
      c. Phase 3: June 29, 2018
   2. The project’s Final Completion date is: August 31, 2018