

## **Baker School District 5J 2021-23 Capital Bond Projects Request for Proposal – Commissioning Authority (CxA) Services**

Request for Proposal Issued:

March 30, 2022

Proposals Due Back to Wenaha no later than:

**April 20, 2022 @ 2 PM PST**

The Baker School District (5J) is seeking proposals for Commissioning Authority (CxA) services associated with the 2021-23 Capital Bond Projects. Scope includes renovation of HVAC/Electrical Equipment at (7) of Baker’s schools and new construction of a Cafeteria/Multipurpose Building at Baker Middle School.

The projects specifically associated with Commissioning Authority services include:

1. Replacement of the mechanical system and upgrades to the electrical services to provide heating, cooling, and ventilation to the following schools:
  - a. Baker High School
    - i. Located at: 2500 East Street, Baker City, OR
    - ii. *Anticipated Construction Budget: \$451,000*
  - b. Baker Middle School (Helen M Stack)
    - i. Located at: 2320 Washington Ave, Baker City, OR
    - ii. *Anticipated Construction Budget: \$780,000*
  - c. South Baker Intermediate School.
    - i. Located at: 1285 3<sup>rd</sup> St, Baker City, OR
    - ii. *Anticipated Construction Budget: \$891,000*
  - d. Brooklyn Primary School.
    - i. Located at: 1350 Washington St, Baker City, OR
    - ii. *Anticipated Construction Budget \$1.1M*
  - e. Baker Early Learning Center (North Baker/ “BELC”)
    - i. Located at: 2725 7<sup>th</sup> St, Baker City, OR
    - ii. *Anticipated Construction Budget: \$1.0M*
  - f. Haines Elementary School.
    - i. Located at: 400 School St, Haines, OR
    - ii. *Anticipated Construction Budget: \$530,000*
  - g. Keating Elementary School.
    - i. Located at: 41964 Miles Bridge Road, Keating, OR
    - ii. *Anticipated Construction Budget: \$257,000*
2. Design and Construction of a new stand-alone 6,100sf Cafeteria/Multipurpose Building adjacent to Baker Middle School; the building is to include a cafeteria and fully operational kitchen.
  - a. *Anticipated Construction Budget: \$2.7M*



The District has selected Wenaha Group of Pendleton, Oregon for project management services and LKV Architects of Boise, Idaho for design services. The Cafeteria/Multipurpose, Middle School, High School, South Baker, Brooklyn, Haines, Keating, and BELC will be hard bid, and the contractor has not been selected yet.

The objective of the bond is to provide efficient and reliable heating, cooling, ventilation to the students and faculty of Baker City while also reducing annual operating expenses and long term cost of ownership. It is expected that the selected consultant will collaborate with the respective Owner stakeholder group and construction team in regards to performance.

The most current schedule, prepared by Wenaha Group and dated March 15, 2022, is provided as "Attachment A" and is page thirteen (13) of this document.

#### **Commissioning Authority Scope of Services:**

The District requires a Commissioning Authority firm to work as part of the construction team, ensuring that the projects are constructed with the highest practical quality and materials. The successful firm will be required to provide services starting June 2022 and continue through project closeout which is anticipated for October 2023.

- Note: given the COVID-19 Health Crisis, it is unknown which of the meetings proposed during the Design phase will occur via Zoom Meetings or in-person; the District and corresponding Project Team take this health crisis seriously and are taking steps to ensure the health and safety of all team members and are currently meeting strictly via Zoom Meetings. This approach may change as the COVID-19 Health Crisis progresses, but only after direction from appropriate State and Federal Agencies and with the consent of the District. Please take this into consideration when preparing your respective fee proposal.

The District is pursuing incentives from the Energy Trust of Oregon (Cascade Natural Gas). The District is also working with Oregon Trail Electric Co-op (OTEC) for available incentives. The District will require that responding firms be able to meet the standards as outlined in ASHRAE Guideline 0-2013, the Energy Trust of Oregon Form 520CD-DR, and be a professional engineer registered in Oregon, or provide documentation showing that the firm has been the CxA on at least two previous projects similar in scope and complexity.

Additional detail associated with Energy Trust of Oregon incentives can be obtained by reviewing Energy Trust of Oregon Form 540PE, Form 520CX-DR and Form 520CX-FT; links are as follows:

540PE: [https://www.energytrust.org/wp-content/uploads/2017/01/NBE\\_FM0540PE.pdf](https://www.energytrust.org/wp-content/uploads/2017/01/NBE_FM0540PE.pdf)  
520CX-DR: [https://energytrust.org/wp-content/uploads/2016/10/NBE\\_FM0520CX-DR.pdf](https://energytrust.org/wp-content/uploads/2016/10/NBE_FM0520CX-DR.pdf)  
520CX-FT: [https://www.energytrust.org/wp-content/uploads/2017/01/NBE\\_FM0520CX-FT.pdf](https://www.energytrust.org/wp-content/uploads/2017/01/NBE_FM0520CX-FT.pdf)



Commissioning will include assurance of compliance with both natural gas and electric energy efficient measure design goals and confirmation of energy savings to meet reporting requirements for the Energy Trust of Oregon and Oregon Trail Electric Co-op.

**Required Scope of Commissioning Services:**

**1. Design Phase Commissioning Process:**

- a. During the design phase, the commissioning consultant shall carry out the following scope of work:
  - i. **Contract Document Review:** collect and review Design Intent Information from the Design Team and verify it meets the Owner’s project requirements; design intent documentation will be used in conjunction with the contract documents to develop the commissioning plan, pre-functional tests, and functional performance tests.
  - ii. **Commissioning Plan:** develop a commissioning plan for the project; the commissioning plan is a tool through which the commissioning process is described and incorporates the Owner, Designers, Contractor and Commissioning Consultant’s rolls relative to the commissioning process. The Commissioning Plan will include, at a minimum, the following:
    1. The purpose of the commissioning;
    2. Detail the commissioning process;
    3. Identify commissioning team members;
    4. Include a commissioning team organizational chart;
    5. Define commissioning team members responsibilities;
    6. Describe pre-functional and functional test procedures;
    7. Outline systems to be commissioned;
    8. Provide the commissioning schedule.

**2. Construction Phase Commissioning Process:**

- a. During the construction phase, the commissioning consultant shall carry out the following scope of work:
  - i. Coordinate the commissioning work with the Owner, Contractor, sub-contractors, and other pertinent entities to ensure that commissioning activities are incorporated into the project construction schedule;
  - ii. **Pre-functional Test Checklists:**
    1. Develop pre-functional checklists for each piece of commissioned equipment; the pre-functional checklist will outline required steps for the Contractor to complete prior to functional testing. Pre-functional test checklists verify installation, start-up and that operational assessments have been completed for the commissioned equipment;
  - iii. **Commissioning Field Notebook:**
    1. Develop a commissioning field notebook to be used and completed by the Contractor and required sub-contractors; the notebook will identify and track all pertinent commissioning documentation required during



the installation, start-up and check-out phases. The notebook will be maintained by the Contractor onsite and will be made available to all sub-contractors for their use. The notebook provides a central location for the subcontractors and Commissioning Consultant to identify, copy, and organize all pertinent commissioning information;

2. The commissioning field notebook will contain:
  - a. Summary describing Notebook contents and use;
  - b. Commissioning Plan for Contractor field reference;
  - c. Tabs for each system with copies of pre-functional and functional test check sheets for pieces of equipment identified as part of that respective system;
  - d. Commissioning project communication reports, deficiency logs schedule information or any other documentation provided by the Commissioning Consultant;
  - e. Dates when the Commissioning Consultant will be onsite.
- iv. **Commissioning Kickoff Meeting:**
  1. The Commissioning Consultant will participate in a pre-construction coordination/commissioning kick off meeting with the Contractor within 60 days of construction contract award; the commissioning plan will be presented to the commissioning team during the commissioning kick off meeting. The commissioning team will review the provided plan and provide comments to the Commissioning Consultant. The Commissioning Consultant will incorporate appropriate comments into the plan and a finalized commissioning plan will be distributed to the commissioning team.
  2. The commissioning field notebook will be provided to the Contractor during the commissioning kick off meeting; instructions for its use will be conveyed during the meeting.
- v. **Installation Inspections:**
  1. During the course of construction, the Commissioning Consultant will perform installation inspections for commissioned equipment and systems; deficiencies will be notes and conveyed in project communication reports to the appropriate commissioning team members.
- vi. **Pre-functional Test Checklist Completion:**
  1. Using the pre-functional test checklists developed by the Commissioning Consultant, the Contractor will verify that the systems installed are in compliance with the construction documents and are fully functional; functional testing will only being when checklists are completed by the appropriate subcontractors, initialed, signed and returned to the Commissioning Consultant indicating specific system completion.
  2. Contractor will issue a written notice of readiness to the Commissioning Consultant upon completion of all systems work, start-up, and



endorsement of pre-functional tests.

vii. **Contractor Submittal Review:**

1. In preparation for development of functional test procedures, the Commissioning Consultant will review Contractor submittals for commissioned equipment and systems.
2. Contractor will provide copies of the submittals for commissioned systems and equipment to the Commissioning Consultant for use in development of functional test procedures; submittals will be reviewed for conformity with the Design intent.

viii. **Functional Test Procedures:**

1. The Commissioning Consultant will develop functional test procedures for each piece of commissioned equipment; the functional tests will outline the process for testing the buildings systems. Functional tests verify the performance of the equipment adhere to the Design intent.
2. Functional test procedures include, but are not limited to, the following:
  - a. Onsite verification of testing, adjusting and balancing performance;
  - b. Onsite verification of the performance of automated controls in all seasonal modes;
  - c. Onsite verification of the performance of a HVAC system;
  - d. Onsite verification of the performance of electrical systems;
  - e. Verification of trending capabilities of the automated controls system.

ix. **Functional Testing:**

1. Functional testing is intended to begin upon completion of a system; Commissioning Consultant will not begin the functional testing process until each system is complete and documented. Testing may proceed prior to the completion of systems and/or sub-systems if expediting this work is in the best interests of the Owner.
2. Functional testing is performed by the Contractor and witnessed by the Commissioning Consultant onsite to verify proper sequencing, operation and performance of installed equipment and systems under realistic operating conditions. As tests are successfully completed, systems will be deemed acceptable by the Commissioning Consultant.
3. The Contractor is responsible for coordinating participation of Commissioning Consultant and subcontractors in functional testing.

x. **Commissioning Deficiency Log:**

1. When acceptable performance cannot be achieved by tested equipment and systems, the cause of the deficiency will be identified. Deficiencies will be collected and tracked in a commissioning deficiency log maintained by the Commissioning Consultant.

xi. **Corrective Measures:**

1. If acceptable performance cannot be achieved by a piece of equipment or a system and if the deficiency is caused by installation error by the



Contractor, the necessary corrective measures shall be carried out by the Contractor. Once corrective measures have been completed, the equipment or system will be retested by the Commissioning Consultant until acceptable performance is achieved.

2. The Contractor will be allowed one retest by the Commissioning Consultant after initial testing of the equipment. If acceptable performance is not achieved after the initial retest, the Contractor shall be financially responsible at standard rates to reimburse the Owner representatives for the additional time taken to resolve the deficiency.
- xii. **Project Communication Reports:**
1. In addition to the pre-functional test checklists, functional test procedures, and the commissioning deficiency log, project communication reports will be delivered for all other commissioning activities performed by the Commissioning Consultant. Project communication reports will be issued to the Contractor and key members of the commissioning team to document apparent deficiencies identified during examination of design and construction documents; daily activities on-site; installation deficiencies; and successful or unsuccessful functional testing results.
- xiii. **Commissioning Meetings:**
1. Commissioning meetings will be held periodically during the construction process to review the status of the construction and commissioning work, develop construction completion and testing schedules, and the status of submittals required by this Section. Attendance by the Construction Team is required for commissioning meetings.
  2. Commissioning meetings will be coordinated by the Contractor. Meeting minutes will be developed and maintained by the Commissioning Consultant.
- xiv. **Performance Period:**
1. Upon successful completion of functional test procedures, a performance period of 15 consecutive calendar days shall commence on first day following the last performance test. This period shall be completed prior to final acceptance of the project. In event of failure to meet standard of performance during any initiated performance period, it is not required that one 15-calendar day period expire in order for another performance period to begin.
  2. If equipment or system operate and demonstrate continuing compliance with specified requirements for period of 15 consecutive calendar days from commencement date of performance period, it shall be deemed to have met the standard of performance.
  3. Equipment will not be accepted by the Owner and final payment will not be made by the Owner until acceptable performance is met.



4. Contractor shall provide Commissioning Consultant with trend logs of the system performance for the control variables and set point in each control process in 15-minute time increments.
5. Systems shall be first tested as independent building systems followed by tests of systems tied into Owner's systems. Types of Owner's systems include, but are not limited to, central plant heating and cooling; off-site security / alarm monitoring; and campus automated controls systems.
6. Upon Contractor's completion of the requirements of the commissioning plan and the successful completion of the performance period, and receipt of the required documentation, the Commissioning Consultant shall provide the Owner with a statement of acceptable performance.

xv. **Operations and Maintenance Manual Review:**

1. The Contractor shall assemble operations & maintenance manuals as described in other sections of these contract documents.
2. The Commissioning Consultant will review the operations & maintenance manuals of commissioned systems and equipment once they have been reviewed and accepted by the designer.

xvi. **Training:**

1. A training plan will be developed by the Contractor outlining equipment that requires training, who will perform the training, when the training will occur, and the required duration of the training. Once the training plan is developed, the Owner will provide that the appropriate personnel attend the training.
2. Training sessions should include using the operations & maintenance manuals and as-built drawings assembled by the Contractor.
3. Detailed requirements for training and instruction are contained in other sections of these Contract Documents. The Commissioning Consultant will track that training requirements have been satisfied by the Contractor.

xvii. **Commissioning Report:**

1. Once acceptable performance is achieved, the Commissioning Consultant will complete a commissioning report. The report shall include:
  - a. A commissioning activity executive summary;
  - b. The finalized commissioning plan;
  - c. The completed commissioning field notebook including pre-functional test checklists and specified commissioning related documentation;
  - d. Completed functional test procedures;
  - e. Commissioning project communication reports;
  - f. Up to date commissioning deficiency log;
  - g. Performance period trend log analyses.

3. **Acceptance:**



- a. During the acceptance phase, the commissioning consultant shall carry out the following scope of work:
  - i. Review and inspect, on a sample basis, the testing, adjusting and balancing work that has been carried out by another agency;
  - ii. Conduct functional performance testing of sub-systems, systems, and interactions between systems, leading to acceptance of the completed work. Document results of all tests witnessed;
  - iii. Organize and direct the training of O&M personnel.
- 4. **Post Acceptance:**
  - a. During the post-acceptance phase, the commissioning consultant shall carry out the following scope of work:
    - i. Conduct functional performance testing of sub-systems, systems, and interactions between systems that could not be carried out prior to acceptance due to unsuitable weather conditions;
    - ii. Prepare and submit a final commissioning report;
    - iii. Provide follow-up for quality performance during the warranty period;
    - iv. All back checks during this phase shall be performed by the Commissioning Consultant.

**Systems To Be Commissioned:**

The following systems, including all components and controls which use or rely upon natural gas and electricity, are to be commissioned as part of the Scope of Services in accordance with the process described below. The respective equipment per school is outlined in Attachment B. Systems and equipment to be commissioned include, but are not limited to:

- 1. All HVAC & R Systems and Controls, including:
  - a. Heating Water System:
    - i. Heating Water Pumps
    - ii. Expansion Tanks
    - iii. Glycol Feeder
    - iv. Variable Frequency Drives
    - v. Boilers
    - vi. Heat Exchangers
    - vii. All hot water coils and associated control valves
    - viii. Review and approve final hot water balance report
  - b. Chilled Water System:
    - i. Chilled Water Pumps
    - ii. Expansion Tanks
    - iii. Variable Frequency Drives
    - iv. Glycol Feeder
    - v. Chiller
    - vi. Cooling Tower
    - vii. All chilled water coils and associated control valves





- viii. Review and approve final chilled water balance report
- c. Air-Handling Systems:
  - i. Air Handling Units
  - ii. Chilled Water Coils
  - iii. Heat Recovery Systems
  - iv. Hot Water Coils
  - v. Dampers
  - vi. Valves
  - vii. Variable Frequency Drives
  - viii. Fan Coil Units
  - ix. Pressure Independent Air Controllers
  - x. Exhaust Fans
  - xi. Filters (Verify MERV Ratings)
  - xii. Make Up Air Units
  - xiii. Dedicated Outside Air Systems (DOAS)
  - xiv. Cooking Hoods
  - xv. Science Hoods
  - xvi. Ducted and Not Ducted Split Type Systems
  - xvii. Variable Refrigerant Flow (VRF) Systems
  - xviii. Ducting Systems (Leak Verification and Insulation Values)
  - xix. Review and approve final air flow balance report
- d. Auxiliary Heating and Cooling Equipment:
  - i. Hydronic Unit Heaters/Cabinet Heaters
  - ii. Air Conditioning/Condensing Units
  - iii. Heating and Cooling Heat Pumps
  - iv. Electric Heaters
- e. Domestic Water Systems:
  - i. Pressure Reducing Valves
  - ii. Water Heaters
  - iii. Domestic Hot Water Circulation Pumps
  - iv. Expansion Tanks
- f. Automated Control System(s), including equipment operational sequences, point to point checkout, control component calibration, alarming, fire alarm interface, trending.
- g. All new lighting control systems.
  - i. Occupancy Sensors
  - ii. Photo Sensors
  - iii. Dimming Controls
  - iv. Timed Automated ON/OFF controls
  - v. Lighting control system over-ride controls

**Submittal Requirements:**

Responses can either be provided as an attachment to an email, or available via a download link (i.e. DropBox or similar). The District requires that submitted responses be “built” as if the files were



being submitted for printing, with section dividers/page breaks corresponding to the sections named below. Each firm submitting a proposal must adhere to this format. Failure to do so could lead to non-consideration of the firm's proposal.

Firms are to provide the PDF response via email, either as an attachment or download link, to the District's Project Manager, Shandiin Yessilth, at [ShandiinY@WenahaGroup.com](mailto:ShandiinY@WenahaGroup.com)

**1. Firm Overview and Project Team (20 points):**

- a. Firm Description – Include a brief description of the firm.
- b. Proposed Commissioning Authority (CxA) – List the individual(s) who will be the project's Commissioning Authority (there may be more than one person). Describe each individual's relevant qualifications and experience. The contract will require that the individual(s) serving as the CxA be committed to the project for its duration.
- c. Project Team: Provide an organizational chart of your proposed team. Provide a resume for each member of your listed staff (including the CxA), including education, project commissioning experience, and any special expertise or unique qualifications.
- d. Confirm that the firm is a registered Trade Ally with the Energy Trust of Oregon.

**2. Building Commissioning Experience (20 points):**

- a. Briefly describe your firm's relevant experience in three (3) similar projects within close proximity to Baker City/Baker County geographic region; provide detail to similar new construction projects as well as major renovation projects. Provide clarity to any interaction or involvement with the Energy Trust of Oregon or OTEC on the relevant projects referenced. If unable to provide three (3) similar projects within close proximity to Baker City/Baker County geographic region, provide similar examples in other similar climate ranges.
- b. Include a brief description of the project, along with the following bullet points for each project:
  - i. Owner contact name, address, phone number, and email address;
  - ii. Month and year of construction completion/occupancy;
  - iii. Commissioning services provided by your firm, including the phase during which your firm began providing services;
  - iv. Project team members from your firm associated with the project and the role of each team member and/or the tasks they performed.

**3. Project Approach (20 points):**

- a. Describe in a narrative, your proposed approach to managing the project expertly and efficiently, including your team's participation (such as distribution of tasks, travel, and duration of time for which staff will be on site and during what periods of time, etc.). Please also describe what approach you will take for integrating the commissioning activities into the design and construction, including what you will do to foster teamwork and cooperation from contractors and designers and what you will do to minimize adversarial relationships.

**4. Fee Proposal and Agreement (0 points):**



- a. Provide a fee proposal with a total lump sum for the Scope of Services.
- b. Provide a Fee Schedule of Hourly Rates used to calculate the above fees and that will be used for any Additional Services that may be required on the project.
- c. The proposed Lump Sum Fee should include all reimbursable expenses. The Commissioning Provider Organization will not be reimbursed for the following:
  - 1. Accounting
  - 2. Telecommunications and Postage
  - 3. Mileage, Transportation, and Parking
  - 4. Travel Expenses
  - 5. Photocopying and Office Supplies

**Selection and Contract Award:**

The submitted proposals will be evaluated according to the following criteria:

<i>Firm Overview and Project Team</i>	<i>20 points</i>
<i>Building Commissioning Experience</i>	<i>20 points</i>
<i>Project Approach</i>	<i>20 points</i>
<i>Fee Proposal and Agreement</i>	<i>0 points</i>
<b>TOTAL LUMP SUM</b>	<b>60 points</b>

Reference checks will not be scored individually, but will be used to supplement all categories. The Owner reserves the right to eliminate or change the weight of extremely high or extremely low fee proposals.

Presentations/Interviews: At the discretion of the Owner, firms may be asked to make a formal presentation to the Owner after submittal of their proposals.

Contract Award and Schedule: The Owner shall not be obligated to make an award of contract. The Owner reserves the right to negotiate with the selected consultant on the Form of Agreement, the terms and conditions, the tasks, staffing, schedule and fee proposal. Negotiations may be formally terminated, at the discretion of the Owner, if they fail to result in a contract within a reasonable time period. Negotiations may then ensue with the second selected consultant, and so forth, until a contract is executed or the Owner decides to discontinue the process.

The successful firm and its representatives, including at minimum the proposed CxA, must be prepared to begin design phase services immediately.

The District may reject any proposal not in compliance with prescribed procedures and requirements and may reject for good cause any and all proposals upon a finding of the District it is in the public interest to do so. The District is not responsible for any costs of any proposers incurred while submitting proposal; all proposers who respond to solicitations do so solely at their own expense.



**Project Team:**

**Owner's Representative / Project Manager:**

Wenaha Group, Inc.  
125 SE Court Ave., Suite A  
Pendleton, OR 97801  
Shandiin Yessilth, Project Manager

**Architect:**

LKV Architects, Inc.  
2400 E Riverwalk Dr  
Boise, ID 83706  
Amber Van Ocker, Principal

**Mechanical Engineer:**

Musgrove Engineering  
234 South Whisperwood Way  
Boise, Idaho 83709  
Bill Carter, Mechanical Engineer

**Electrical Engineer:**

Musgrove Engineering  
234 South Whisperwood Way  
Boise, Idaho 83709  
Kurt Lechtenberg, Electrical Engineer

**Attachments:**

1. Attachment A – Overall Project Schedule dated March 15, 2022
2. Attachment B – HVAC Equipment Matrix for Schools dated March 29, 2022
3. Attachment C – DD Set for the Cafeteria/Multipurpose Building dated March 11, 2022
4. Attachment D – Bid set for the Middle School dated March 3, 2022
5. Attachment E – Bid set for the Brooklyn Primary School dated March 3, 2022

Attachments A-E will be available for download via Drop Box:

[https://www.dropbox.com/sh/6j6oaovtkks13yv/AAAJ\\_TJuTjwHp3A2ViXEPpa?dl=0](https://www.dropbox.com/sh/6j6oaovtkks13yv/AAAJ_TJuTjwHp3A2ViXEPpa?dl=0)

Proposals are due back **\*via email\*** to Wenaha Group no later than 2 PM Pacific Time on April 20, 2022; email to Shandiin Yessilth, Project Manager at Wenaha Group:

[ShandiinY@WenahaGroup.com](mailto:ShandiinY@WenahaGroup.com)

The selected firm will be notified and proceed into a consulting agreement upon selection; direct all communication **via email** to Shandiin Yessilth at [ShandiinY@WenahaGroup.com](mailto:ShandiinY@WenahaGroup.com)



