

PROJECT FACT SHEET
BUILDING SYSTEMS TESTING, ADJUSTING, AND BALANCING
(Renovation and Construction Continuing Services)
University of Central Florida (All Campuses)

The University of Central Florida has a need for several firms to provide professional services required for Testing, Adjusting, and Balancing (TAB) of HVAC systems, for all new construction, and major renovations projects with construction budgets of less than \$2,000,000. The HVAC systems include airflow systems (constant and variable volume), supply/return/relief/exhaust fan systems, energy recovery systems, hydronic systems (constant and variable), chiller testing, cooling tower testing, boiler testing, capacity testing, kitchen systems, laboratory systems (constant and variable), and interfacing with the commissioning process. The TAB professional will have acted as a principal TAB for at least five projects over 25,000 square feet.

The University of Central Florida wishes to enter into an open-ended contract with multiple companies for a period of one year, with an option to renew for three additional one-year periods. The University has the right to amend the terms of the contract at each annual renewal. Blanket professional liability insurance for the Architect/Engineer will be required for this project in the amount of \$2,000,000 and will be provided as a part of Basic Services.

TAB Firms will develop and coordinate the execution of a TAB Plan, which includes pre-TAB observations, field reports, participation in building system commissioning as part of the Commissioning Plan, implementation of air and water balancing, and documenting all systems' performance to ensure that the systems are functioning in accordance with the contract documents.

Projects being implemented may border or be within occupied areas, and projects will in many cases need to be phased to allow partial occupancy during construction. ALL projects will, need to ensure the safety of students, faculty, and staff. Projects may be located on University of Central Florida or UCF-affiliated properties.

NOTE: The Selection Committee may reject all proposals and stop the selection process at any time. The University also reserves the right to cancel the project at any time.

INSTRUCTIONS:

Carefully review the Contract posted with this advertisement at www.fp.ucf.edu. Submitting a proposal for this project constitutes complete agreement with, and acceptance of, the terms and conditions contained within these documents. NO changes will be accepted.

Contractors desiring to apply shall submit **only electronic submissions**, to be uploaded at: <https://ucf.bonfirehub.com/opportunities/5430>, comprising:

1. a letter of interest;
2. a completed PQS form;
3. a copy of the Architect/Engineer firm's current Professional Registration Certificates from the appropriate governing board. At the time of submitting the applicant must be properly registered to practice its profession in the State of Florida. If the applicant is a corporation, it must be chartered by the Florida Department of State to operate in Florida;
4. a list of completed jobs over the last three (3) years, with contract value, contact name, and telephone number of the client; and
5. narratives to address items listed in the Selection Criteria, as listed below.

Pages must be numbered consecutively. Proposals must not exceed 40 pages single-sided, or 20 pages double-sided. Points will be deducted for proposals exceeding the 40-page limit.

Please upload the proposal as one (1) single file.

Detailed submissions instructions can be downloaded from the link shown above.

Applications that do not comply with all instructions may be disqualified.

Application materials will not be returned.

No oral communications shall be binding as a change to the Advertisement or Project Fact Sheet. Interpretation of the wording of this Project Fact Sheet shall be solely that of UCF and that interpretation shall be final. UCF may respond to questions deemed by the University to be material in nature.

It shall remain the responsibility of the firms participating in this solicitation to check the website regarding any addendums and Notice of Change.

As required by University of Central Florida Regulations 7.102.22, a Contractor may not submit a proposal for this project if it is on the convicted vendor list for a public entity crime committed within the past thirty six (36) months. The selected Contractor must warrant that it will neither utilize the services of, nor contract with, any supplier, subcontractor, or contractor in excess of \$15,000.00 in connection with this project for a period of thirty six (36) months from the date of their being placed on the convicted vendor list.

SELECTION CRITERIA

Proposals are to be organized using numerical divisions shown below. Firms will be evaluated on the following:

1. The most recent version of the PQS Form. Do not alter the form.
2. **Past Performance.** Provide information on five (5) projects that are similar in size, complexity, and scope to what may be performed under this contract with UCF. Clearly articulate within each of the 5 projects information regarding:
 - a) similarity in service and complexity;
 - b) similarity in function;
 - c) initially scheduled completion dates and actual completion dates;
 - d) original budget and final budget;
 - e) owner's contact information;
 - f) date completed; and
 - g) names of proposed team members who worked on each project and roles that the proposed team members played.
3. **Ability to Take on Additional Work.**
 - a) Reflect your current workload and staffing.
 - b) Describe how UCF's workload will be fulfilled.
4. **Experience and Ability.** Describe your firm's experience and ability:
 - a) working with utility providers; distributed generation; industrial generation facilities for water, waste water, chilled water, and electrical generation;
 - b) working with public, higher education clients and their Standards and processes;
 - c) knowledge of Federal Energy Regulatory Commission (FERC), Florida Public Service Commission (FPSC), utility regulated tariffs, deregulated riders, negotiating purchases of distribution and generation systems, and UCF's Carbon Neutrality Goals;
 - d) working with ASRAE 11 procedures for the fume-hood testing and recertification;
 - e) with cost estimating;
 - f) with cost control, including methods employed;
 - g) managing and performing numerous projects at the same time;
 - h) completing projects on time and within budget.
5. **Personnel.** Provide bios for the project executive/principal, project manager, certified technician; and any other personnel that you believe are critical to the success of the work to be performed. Also discuss the qualifications required of your workforce. Certification must be Associated Air Balance Council (AABC), National Environmental Balancing Bureau (NEBB). This includes Certified

Technicians. If the TAB Firm's personnel or sub-consultants change, the Owner must review and approve the replacement personnel, in advance. The replacement personnel shall have, at minimum, equivalent qualifications as the original personnel.

- a. The TAB team members shall have extensive experience in:
 - i. the operation and troubleshooting of heating, ventilation, air conditioner (HVAC) systems;
 - ii. direct digital control (DDC) systems;
 - iii. lighting control systems; and
 - iv. testing, adjusting, and balancing of HVAC systems, both air and water systems. Extensive (minimum of five years) field experience is required for this type of work and systems.
6. **References.** Provide contact information for professional references: three direct clients, three general contractors, and three suppliers.
 7. **Location.** Provide the address of your main office, any regional/local offices you have. Provide details of what services and personnel you have at each location.
 8. **Safety and Security.** Describe your policies, planning, and practices related to safety and security. **Note:** Criminal background checks, E-verification, drug free workplace, and drug and alcohol testing verification must be provided by the continuing service Contractor for all employees and sub-contractors. Picture ID cards will be worn at all times workers are on the job.
 9. **QA/QC.** Describe your firm's approach to Quality Assurance and Quality Control.
 10. **SDVOSB and MWBE.** Describe how your firm employs and uses Service Disabled Veteran-Owned Small Business (SDVOSB) and Minority and Women-Owned Business Enterprise (MWBE) and whether your firm is certified and by what agency.
 11. **Conflict Avoidance and Resolution.** Describe your firm's practices to avoid and resolve conflict. Describe three (3) occasions when conflict occurred, and discuss how it was resolved.
 12. **Job-specific Qualifications.**
 - a. Demonstrate your company's TAB Process in accordance with either latest AABC National Standards for Total System Balancing or NEBB Procedural Standards for Testing, Adjusting, and Balancing of Environmental Systems.

- b. Discuss your team members' knowledge and experience in building operations and maintenance (O&M) and experience providing O&M training.
- c. Demonstrate team members' experience writing TAB specifications and test procedures.
- d. Discuss how you will meet the following: The team must have a principal-in-charge that is a professional engineer in the State of Florida, with other Certified TAB Technicians as appropriate. At least one field staff on site must be a Certified TAB Technician with skills in TAB, especially in the areas of Commissioning, HVAC operations, and electrical system operations.

GENERAL INFORMATION

1. All applicants will be notified of the results of the short-listing in writing. Finalists will be informed of interview dates and times, and will be provided with additional information, if applicable.
2. The Selection Committee will make a recommendation to the University President. All finalists will be notified in writing of the President's action. Upon approval by the President, negotiations will be conducted in accordance with Section 287.055, Florida Statutes.
3. Selection Committee Team Members have elected not to meet with firms prior to interviews.