# **Commissioning (Cx) or Retro Commissioning (RCx) Request for Proposal (RFP) Template**

# *Purpose of Document and Instructions*

*This document provides a template for Commissioning (Cx) or Retro Commissioning (RCx) services only Request for Proposal [RFP] and is intended for use by an education sector administrator (the Agency) to solicit bids for the design and/or construction of Commissioning services in their school districts. The Agency shall select applicable sections and modify them as needed, so that this document may be used in conjunction with a scope of work (SOW) to describe the scope and requirements of the Commissioning services.*

*In this document, areas in Italics are to help describe what to do in certain areas of this document and should not be included in the RFP itself.* ***Please delete all italics sections before issuing.***  *In addition, specific areas have been highlighted in yellow to draw the Agency’s attention for review and modification.*

# Disclaimer

This template is intended as a resource only and should be modified for your specific needs. It is the responsibility of the Agency to ensure that all procurements follow applicable local, state, and federal requirements and agency-specific policies and procedures. The use of the Commissioning (Cx) or Retro Commissioning (RCx) services contracting model should be understood by the Agency and decision-makers early in the process. All documents comprising the Commissioning (Cx) or Retro Commissioning (RCx) services agreement must be thoroughly reviewed by the Agency’s contracting and legal staff and should be modified to address each Agency’s unique acquisition process, service and project-specific characteristics.

# Policies

Proposers must agree to:

a. Not discriminate against any employee or applicant for employment because of race, creed, color, gender, gender expression, age, religion, ancestry, marital status, national origin, mental or physical disability, sexual orientation, veterans or military status, or any other characteristic protected by law except where any of those characteristics is a bona fide occupational qualification reasonably necessary to the normal operation of their business.

b. Post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause. Notices, advertisements, and solicitations placed in accordance with federal laws or regulations shall be deemed sufficient for meeting the intent of this action.

The submission of proposals constitutes acceptance of the terms and conditions of the RFP.

The Agency reserves the right to award the contract to the Proposer whose offer provides the greatest overall value to the Agencies. The award may not be determined by price alone. *The* *Agency using this RFP should revise as needed to suit their procurement process requirements*.

The Agency reserves the right to review any proposal in full or in part and to accept or reject any or all proposals.

If necessary, contract negotiations related to the timeline may proceed following selection of the successful proposal.

The Agency reserves the right to approve or reject any sub-Proposers proposed for work under this proposal or waive any minor irregularities.

The Agency reserves the right to select the successful Proposer based on proposals received, without seeking further information for clarification from the Proposer.

Any proposal submitted after the due date and time will be set aside and retained unopened. Organizations that submit late proposals shall be sent a letter notifying them that their proposal was late and could not be considered for an award, unless they have received prior approval for an extension, or the agencies reject all proposals received by the due date.

The Proposer agrees to be responsible for any damage arising from practices or activities undertaken under their scope of work (the Proposer must show proof of insurance to cover liability for such damages).

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# Commissioning Overview and Goals

*For commissioning (Cx) services, this is achieved by beginning in the planning or early design phase of a construction or retrofit project that includes equipment replacement, with documentation of design intent and continuing through construction, acceptance, and the warranty period with the actual verification of each building system’s performance.*

*For Retro Commissioning (RCx) services, this is achieved by identifying and correcting problems and optimizing performance in existing equipment. It is performed in response to specific problems through diagnostic monitoring and functional performance testing. RCx is ideal for older facilities that have never or not recently been through a Commissioning process. [[1]](#footnote-1)*

*Ongoing Commissioning or Monitoring Based Commissioning is intended to identify and correct problems and optimize performance as part of an ongoing facility O&M program and is done through data monitoring, trending, and analysis (MBCx are ideal for facilities with building automation systems (BAS), advanced metering systems, and advanced O&M organizations). \**

The [XX school / school district] (The Agency) is soliciting a proposal from a qualified Commissioning Agent (a Proposer) to implement services that include [Commissioning and/or Retro Commissioning] of energy efficiency, electrification, and/or health, comfort, and safety upgrades as specified in the Scope of Work (see attachment).

*Commissioning is the process of thoroughly verifying and proving that building systems are installed and operating according to the criteria in the original design and engineering documentation.*

*Retro Commissioning (RCx) is the commissioning of existing building systems to meet*

*current building operating criteria. The RCx process systematically reviews the condition of*

*building systems and returns equipment that has fallen out of desired operating parameters back into appropriate tolerances. Retro-commissioning is the process of optimizing an existing*

*building’s operation and maintenance through the implementation of low-cost and no-cost*

*improvements, and does not involve equipment replacement.*

The implementation request is to provide the following services: verify that all building systems specified perform interactively according to the design intention and Owner’s operational needs. These services will focus on building equipment, subsystems, operation and maintenance (O&M) procedures, and performance of all building components to verify that they function efficiently, as designed, as a system.

Hereafter, all of the above variations will be described as Commissioning in this document. This request for proposal (RFP) template is intended for use by Agencies, and to ensure they identify and describe the type of Commissioning appropriate to their facility(ies). The goal is to lower their energy costs, decrease harmful air emissions from heating and power sources; and increase exposure and experience with clean energy technologies in these public buildings.

# Scope of Work

The Scope of Work (SOW) to be performed for the Facility Commissioning (Cx) is provided via attachment [name of SOW file]. The Scope of Work includes background, site description, a description of the required work, anticipated tasks, performance requirements, project timeline, and deliverables.

# **Schedule and Submission Summary**

| **Item** | **Deadline (estimate)** |
| --- | --- |
| RFP Issued | [Desired date] |
| Mandatory Site Walkthrough  | 2 weeks later  |
| Requests For Information deadline | TBD |
| Release of Q&A | 2 weeks later |
| Notice of Intent to Submit | TBD |
| Proposals Due | 4 weeks later |
| Commissioning Agent selection and contracts executed | 2 weeks later |
| Target Completion and Handover | TBD |

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# Submission Requirements and Inquiries

Deadline: [MM DD, YYYY]

Proposals will be accepted until 5:00 p.m. local time [Time zone] MM DD, YYYY. Proposals must be submitted via email to xxx@xxxx.xxx. Proposals will not be considered for award unless submitted in the format described. It is the responsibility of the respondent to ensure that the submittal is received in a timely manner. Fax proposals will not be accepted. Proposals received after this time and date will not be considered.

Questions:

Questions regarding this RFP should be submitted in writing, preferably by email, with the subject line, “XXXXX.” Questions are due by 5:00 p.m. [Time zone] MM DD, YYYY and will be answered comprehensively at [the](http://publicservice.vermont.gov/announcements/rfps) XXX website alongside this RFP by MM DD, YYYY.

Proposals and questions should be addressed to:

[Contact Name]

[Position/Job Title]

Email: XXXXXXXXX@XXXXX.gov

Proposal Format

Proposals must include the following sections:

1. Cover letter
2. Company Profile
3. Comprehensive Commissioning plans
4. Scope of Work (included as a separate document)
5. Detailed price proposal
6. Responsibilities and Deliverables
7. Team members and qualifications (including active licenses, insurance held)
8. Workplan and Timeline
9. [X] Commissioning experience and examples (Minimum of X, maximum of X), *suggest 3 and 5*
10. [X] References (Minimum of X, maximum of X), *suggest 3 and 5*
11. Any relevant supporting documentation

[Optional] Item 1 shall not exceed XX pages. Items 5, and 6 shall not exceed YY pages. Add other page limitations as needed.

# Cover Letter

The cover letter must be addressed to [COMPANY CONTACT] and signed by a legally authorized representative of the respondent. Cover letter must summarize key provisions of the proposal and must include name, address, phone, and email of the respondent contact.

# Company Profile

Include company description, including number of years in business, description of respondent/company background, applicable state licensing, OSHA background and safety protocols, insurance, and quality assurance/quality control processes.

# Comprehensive Commissioning Plans

All technical specifications must adhere to current industry standards and best practices. Describe the plan for project oversight, quality assurance measures, training, O&M, energy measurement, M&V, and financial management, and which team member(s) will have these responsibilities. Provide a timeline for the Commissioning development and implementation.

# Scope of Work

Describe your approach to the project’s Commissioning.

# Detailed Price Proposal

The Proposer should include all expenses associated with the proposed Commissioning and a brief description of the budget details provided.

1. The Proposer will offer a not-to-exceed fixed price for the complete scope of services described in the Proposer’s Technical Proposal, which shall cover costs for each of the items listed in Proposer’s Responsibilities and Deliverables section of this RFP.
2. The Proposer must further provide a cost breakdown and hourly rate for each team member with the proposal.
3. All services necessary for the successful execution of the Commissioning services, including consultations, surveys, data trending and analysis, supervision, reports, plans, follow-up services, and incidental costs shall be detailed in the RFP response.
4. The Proposer will offer a bid that is NOT based on the use of the cost-plus-a-percentage-of- cost or percentage of construction cost form of compensation.

# Responsibilities and Deliverables

In accordance with the work requirements, the Proposer will be responsible for the following:

*The Agency should include the list of main work items from the Scope of Work document here - such as the example below*

[Commissioning

1. Develop a commissioning plan
2. Verify equipment and systems
3. Verify training
4. Develop a systems manual
5. Conduct post occupancy verification
6. Develop commissioning specifications
7. Issue deficiency notices
8. Review bids
9. Reporting]

# Team Members and Qualifications

Please include the name, office location, qualifications, and experience of the individual who would be designated as overall Commissioning Agent as well as any other key team members (e.g. engineers of record), partners or sub-Proposers contributing to the Commissioning services. Include identification of similar work performed by these individual(s) in the last three to five years. A brief statement of qualifications together with appropriate supplemental information demonstrating qualifications of the Architect, Engineer and other key personnel identified to undertake the proposed Commissioning services.

Please indicate the number of years the Proposer and the key personnel have been involved in business or Commissioning projects requiring a similar set of skills and expertise, including knowledge in testing and balancing hydronic/air systems, knowledge of construction methodologies and quality control process, experience in the operation and troubleshooting of HVAC systems, energy management systems, lighting control systems, building electrical systems, fire alarm systems, security systems, experience in monitoring and analyzing system operation and equipment start-up, knowledge in building/equipment operation and maintenance, design experience incorporating energy usage, heating/cooling load calculations and specifying energy efficient equipment and the technology types listed in the scope of work.

Professional Licensure: Name of any professional licensure and memberships such as the American Consulting Engineers Council (ACEC), American Society of Civil Engineers (ASCE), National Society of Professional Engineers (NSPE), and/or the American Institute of Architects (AIA). All design services shall have Engineer and Architects of Record with current licenses in good standing for their local state/jurisdiction.

# Workplan and Timeline

Describe in a narrative form, the plan for accomplishing the work required to procure and complete the proposed Commissioning services for the project. Include a description of any activities in support of the proposal that have already been completed or are in process if any.

Describe the Commissioning plan for project oversight, quality assurance measures, and financial management and which team members will have these responsibilities.

Provide a timeline for the Commissioning services and implementation using the suggested fields below. *(Actual number of fields will depend on overall scope of the project services)*

*Commissioning*

1. Commissioning plan (MM/DD/YYYY)
2. Design phase activities completion (MM/DD/YYYY)
3. Construction phase activities completion (MM/DD/YYYY)
4. Occupancy and Operations phase activities completion (MM/DD/YYYY)
5. Final commissioning report (MM/DD/YYYY)

*Retro Commissioning*

1. Planning activities completion (MM/DD/YYYY)
2. Investigation phase activities completion (MM/DD/YYYY)
3. Implementation activities completion (MM/DD/YYYY)
4. Final commissioning report (MM/DD/YYYY) and hand-off (MM/DD/YYYY)

# Commissioning and/or Retro Commissioning Experience and Examples

Proposals shall include [at least three/maximum of five] recent projects and include projects that were done for similar types of building and project services. Additionally, proposals should demonstrate Proposer’s experience successfully completing projects in collaboration with the U.S. Department of Energy (DOE) and/or other federal or state agencies.

# References

Proposals will list [at least three/maximum of five] relevant references.

# Evaluation Criteria Examples

*The evaluation criteria listed below are examples that may be included. The Agency should select those that are suitable given the specific needs and context of the location and project - it should be modified as needed.* ***It is suggested that you indicate weighting for each of the categories included in the evaluation criteria.***

The selection committee will review, analyze, and rank all submittals based on their response to the information requested. At a minimum, the selection process will include the following criteria in the evaluation process, not in any order of importance:

1. Technical Approach
2. Proposed Schedule
3. Innovation and Approaches to Cost Saving
4. Overall Cost Effectiveness
5. Company Qualifications and Experience in similar projects
6. Energy savings and emissions reduction potential
7. Meeting local and state requirements

*Additional optional components of the RFP are listed below:*

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# Quality Standards:

The Proposer is responsible for professional and technical accuracy and coordination of all work or services furnished. Services submitted by the Proposer shall be reviewed by [Proposer Representative] for compliance with the Agency requirements and criteria. A certified Building Commissioning Professional (BCxP) or credentialed by another HVAC oversight organization shall be included on the team. Errors or deficiencies in the performance of the Proposer services shall be corrected by the Proposer at no additional cost or fee to the Agency.

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# Communication Plan:

Communications channels, frequency of updates, and key contacts for project communication.

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# Risk Management:

Potential risks associated with the project services and outline strategies for risk mitigation.

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# Change Management:

Process for handling changes to the scope, timeline, or budget and outline any associated costs.

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# General Terms and Conditions:

Include any legal or contractual terms and conditions that parties must adhere to.

1. The Agency shall not be responsible for any costs incurred by any party in preparation of any proposal submitted in response to this RFP.
2. The Agency reserves the right to reject any and all proposals received as a result of this RFP for any reason, to waive minor irregularities in any proposals received, and to negotiate with any party in any manner deemed necessary to best serve the interests of the State.
3. The Agency reserves the right to amend or cancel this RFP at any time if the best interest of the Agency requires such action.
4. All entities submitting proposals shall be Equal Opportunity Employers. During the duration of the performance of any grant agreement resulting from this RFP, the awarded Proposer (Awardee) shall comply with all federal, state, and local laws respecting non-discrimination in employment.
5. After a grant agreement is executed, the Agency will reimburse the Subgrantee for actual work performed and expenses incurred up to the specified grant amount. Specific payment provisions will be arrived at upon mutual agreement by the parties. All payments will require the submission of an itemized billing of work performed to date in sufficient detail to justify payment. Final payment will require the submission of a final report and closeout package.
6. Insurance: The Awardee shall name the Agency and its officers and employees as additional insureds for liability arising out of this Agreement.
7. The Agency assumes no liability in any fashion with respect to this RFP or any matters related thereto. All prospective Proposers and their subcontractors or successors, by their participation in the RFP process, shall indemnify, save and hold the Agencies and its employees and agents free and harmless from all lawsuits, causes of action, debts, rights, judgments, claims, demands, damages, losses and expenses or whatsoever kind in law or equity, known and unknown, foreseen and unforeseen, arising from or out of this RFP and/or any subsequent acts related thereto, including but not limited to the recommendation of a Proposer and any action brought by an unsuccessful applicant.

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# Legal and Regulatory Considerations:

Proposals must comply with all local, state, and federal regulations regarding building construction, energy efficiency, and renewable energy installations.

# APPENDIX X - Proposal Summary Sheet Example

Applicant Entity:

Contact Name:

Email:

Phone:

Title:

Authorized Representative (if different contact)

Name:

Title:

Proposed Commissioning Plan Description: (*Please include a list of tasks to complete project; project timeline including estimated start and completion dates)*

Estimated Total Project Cost $: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Grant Funds Requested $: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Source for Matching Funds:

**Approvals Required** (include a brief description of any State, town, or school board approvals received or needed for project):

**Permitting Required** (include a list of permits to needed for the project)**:**

**Preliminary Planning/Project Services Development** (Describe any planning or project development services that has been completed for the project):

Signature of Authorized Representative: Date:

Printed Name of Authorized Representative:

# APPENDIX X – BUDGET SHEET

1. Commissioning for Federal Facilities – A practical guide to building commissioning, recommissioning, retrocommissioning, and continuous commissioning. U.S. Department of Energy, Federal Energy Management Program, and Enviro-Management & Research, Inc. <https://www.energy.gov/sites/prod/files/2014/07/f17/commissioning_fed_facilities.pdf> [↑](#footnote-ref-1)