

**GRAND RAPIDS PUBLIC SCHOOLS (GRPS)  
2015 BOND PROGRAM  
REQUEST FOR PROPOSAL (RFP) - COMMISSIONING SERVICES  
NOVEMBER 11, 2021**



**OWNER:** Grand Rapids Public Schools  
Facilities and Operations Bldg.  
900 Union Ave NE  
Grand Rapids, MI 49503

**OWNER REPRESENTATIVE:** Marc Alexa  
(Direct Requests for Clarification Here) Plante Moran CRESA, LLC  
3000 Town Center, Suite 100  
Southfield, MI 48075  
[Marc.Alexa@plantemoran.com](mailto:Marc.Alexa@plantemoran.com)  
616.258.0418

**REQUESTS FOR CLARIFICATION DUE BY:** **Wednesday, November 16, 2021**  
**By 1:00 pm local time**  
Email to: [Marc.Alexa@plantemoran.com](mailto:Marc.Alexa@plantemoran.com)

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**PROPOSAL DUE:** **Monday, November 29, 2021**  
**By 3:00 pm local time**  
**\*Proposals must arrive before the deadline and the Proposing Firm bears all risks of transmission failure**

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**SUBMIT ELECTRONIC PROPOSAL TO:** Long Nguyen, AIA, NCARB, CDT  
Director of Design, Construction and  
Renovation  
Grand Rapids Public Schools  
[nguyenl@grps.org](mailto:nguyenl@grps.org)

**\*\*\* Please email a copy of your proposal to [Marc.Alexa@plantemoran.com](mailto:Marc.Alexa@plantemoran.com) AFTER the proposal due date and time**

**DESCRIPTION OF PROCUREMENT:** Commissioning Services for Grand Rapids Public  
Schools 2015 Bond Program

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**PROJECT DETAILS**

Grand Rapids Public Schools (hereafter referred to as “Owner” or “GRPS”) has engaged Plante Moran CRESA (hereafter referred to as “PMC”) to provide Owner’s Representation Services for their 2015 Bond Program. The Owner requests written Proposals in response to this Request for Proposals (“RFP”) to secure Commissioning Agent (CA) services.

GRPS invites you to submit a lump sum price proposal package (“Proposal”) for the Services required in this RFP in accordance with this letter and the following documents that are attached hereto, made a part hereof, and form the Contract Documents that may result from this RFP. The Owner is committed to commissioning its facilities to ensure that all systems are well-designed, complete and functioning properly, and that the Owner’s staff has adequate system documentation and training.

**A. Project Overview**

- |                                |         |
|--------------------------------|---------|
| 1. Project Overview/Objectives | 2 pages |
| 2. Scope of Services           | 5 pages |

**B. Project Reference Documents**

- |  |          |
|--|----------|
| 1. Innovation Central and Montessori Basis of Design (BOD)                   | 17 pages |
| 2. Innovation Central High School Renovations<br>Floor Plans dated 9.14.2021 | 7 pages  |

**C. Standard Form of Agreement AIA Contracts, as modified for this Project:**

**\*\*TO BE ISSUED BY ADDENDUM THE WEEK OF NOVEMBER 15, 2021\*\***

- |   |          |
|---|----------|
| 1. Standard Form of Agreement: AIA C103 – 2015, as modified | 11 pages |
| 2. Standard Form of Services: AIA C203 – 2017, as modified  | 7 pages  |

**D. Proposal Forms**

- |                                   |         |
|-----------------------------------|---------|
| 1. Detailed Proposal Form         | 5 pages |
| 2. Commissioning Firm Experience  | 1 page  |
| 3. Familial Disclosure Affidavit  | 1 page  |
| 4. Iran Disclosure Affidavit      | 1 page  |
| 5. Criminal Background Disclosure | 1 page  |
| 6. Non-Collusive Affidavit        | 1 page  |

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This Request for Proposal (RFP) does not commit Owner to award a contract or to undertake any financial obligation whatsoever with respect to the requirements referred to herein. Owner reserves the right to accept or reject any and all Proposals, in whole or in part, to negotiate with any Firm it has selected as qualified, to not award a contract, or to award one or more contracts. Owner further reserves the right to waive any irregularity or informality in this RFP process or any Proposal, and the right to award the Contract to any other than the Firm(s) submitting the best financial Proposal (low proposing Firm). Owner reserves the right to accept or reject, without consideration, any Proposal which arrives late. Owner reserves the right to request additional information from any or all Firms. In addition, notice is hereby given of the possibility that award may be made without discussion of the Proposal with the proposing Firm. In the event the Firm's Proposal is accepted by Owner and the Firm asserts exceptions, special considerations or conditions after acceptance, Owner, in its sole and absolute discretion, reserves the right to thereafter reject the Proposal and award another Firm. Therefore, the Firms should submit their best Proposal initially from both technical and cost standpoints.

**1. PRE-PROPOSAL**

- A. If additional information is needed by the Firm in order to respond to this RFP, written instructions covering such items will be issued by the Owner's Representative to all Firms, and such items shall be acknowledged in the Firm's Detailed Proposal Form. No oral instructions or interpretations will be considered as binding on the Owner unless confirmed by a written addendum. If it becomes necessary to revise any part of this RFP, notice of the revision will be posted on the e-Builder site listed under Item B below. All addenda issued shall become a part of this RFP. Each Firm must in its Proposal, to avoid any miscommunication, acknowledge all addenda which it has received, but the failure of a Firm to receive, or acknowledge receipt of, any addendum shall not relieve the Firm of the responsibility for complying with the terms thereof.
- B. Firms may request that Owner clarify information contained in this RFP. All such requests and inquiries must be made in writing via email to the Owner's Representative indicated on the first page of this RFP. Owner will not respond to any Request for Clarification received after the date and time stated on cover page of this RFP. The response to any Request for Clarification will be posted at:  
  
<https://app.e-builder.net/public/publicLanding.aspx?QS=ba650c662e1f42b196ed37177e243523>
- C. RFP documents may be obtained at the e-Builder website created by PMC by selecting the link above. Please contact Jessica Zanetti at 248-603-5103 or via email at [Jessica.Zanetti@plantemorran.com](mailto:Jessica.Zanetti@plantemorran.com) for e-Builder access assistance should you encounter any difficulties.
- D. **CONFIDENTIALITY** - YOUR PROPOSAL AND ANY MODIFICATIONS THERETO SHALL BE SUBMITTED ONLY TO THE UNDERSIGNED. FAILURE TO COMPLY STRICTLY WITH OWNER'S INSTRUCTIONS REGARDING THE CONTENT AND MANNER OF SUBMISSION OF PROPOSAL INCLUDING, WITHOUT LIMITATION, DISCLOSURE OF ANY INFORMATION IN THE PROPOSAL OR MODIFICATIONS THEREOF TO ANY THIRD PARTY OR OTHER OWNER'S EMPLOYEES WITHOUT THE EXPRESS, PRIOR WRITTEN APPROVAL OF THE UNDERSIGNED, SHALL RESULT, AT OWNER'S SOLE DISCRETION, IN THE IMMEDIATE DISQUALIFICATION OF THE FIRM.

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- E. Provide name, address, telephone and fax number, and e-mail address of the Firm responding to this Request for Proposal. Please designate a single representative or prime contact with which PMC or Owner may communicate.
- F. **PLEASE NOTE:** GRPS reserves the right, in its sole and absolute discretion, to make modifications to the timelines set forth in this RFP as it determines to be in its best interest.

**2. PROPOSAL FORMAT**

Please send emailed electronic proposals for the Services described by this RFP package to [nguyenl@grps.org](mailto:nguyenl@grps.org).

Each Proposal must be organized in the order identified and with the required documents listed below:

Cover Letter

Section 1 Proposal Forms (as outlined in the Project Details, Section D)

- D.1 Detailed Proposal Form
- D.2 Commissioning Firm Experience
- D.3 Familial Disclosure Affidavit
- D.4 Iran Disclosure Affidavit
- D.5 Criminal Background Disclosure
- D.6 Non-Collusive Affidavit

Section 2 Clarifications / Exceptions

Section 3 Additional Information

**SECTION 1 – PROPOSAL FORMS**

- ◆ For the following subsections, complete and attach the Proposal Forms provided as Attachments D1 – D6.

**D.1 – Detailed Proposal Form**

- ◆ Utilize the Detailed Proposal Form Provided as Attachment D.1 to this RFP.
- ◆ Proposals shall include acknowledgement that the Firm has:
  - Reviewed and understands information and data provided in this Request for Proposal
- ◆ Please provide the Fees and Costs for the various components of the Project listed as a lump sum amount as indicated on the Proposal form. Include all personnel costs, personnel-hours, hourly rates, not-to-exceed reimbursable expenses allowances, insurance, etc. Please include in the Proposal a chart showing hours and rates of all Project personnel, including but not limited to Field Representatives, Consultants, etc.
- ◆ Acknowledge by checking the appropriate box that by submitting the Proposal the Firm agrees with the contract terms as provided in the referenced documents.
  - ***Any exceptions that the Firm takes to the terms and conditions listed must be specifically referenced in your Proposal. Provide in Section 2 of your Proposal alternative language that would be acceptable to each provision.***

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- The prevalence of these exceptions will be considered in reviewing the Proposal and in the final selection of the Firm for the project. Proposals that do not acknowledge these agreements or do not provide specific alternative language may be rejected.
- Any exceptions to the terms and conditions contained in the Contract, or any other special consideration or conditions listed by the Firm relative to this RFP or the form Contract, will not be binding upon Owner unless expressly accepted by Owner and incorporated into the final Contract.

**D.2 – Commissioning Firm Experience**

- ◆ Complete and attach the Commissioning Firm Experience form included as Attachment D.2 to this RFP.

**D.3 – Familial Disclosure Affidavit**

- ◆ Complete and attach the Familial Disclosure Statement included as Attachment D.3 to this RFP.

**D.4 – Iran Disclosure Affidavit**

- ◆ Complete and attach the Iran Disclosure Statement included as Attachment D.4 to this RFP.

**D.5 – Criminal Background Disclosure**

- ◆ Complete and attach the Criminal Background Disclosure included as Attachment D.5 to this RFP.

**D.6 – Non-Collusive Affidavit**

- ◆ Complete and attach the Non-Collusive Affidavit included as Attachment D.6 to this RFP.

**SECTION 2 – CLARIFICATIONS / EXCEPTIONS**

- ◆ Please detail any clarifications, exceptions or exclusions to this RFP (scope, schedule, fee, etc.)
- ◆ List any/all exceptions taken to the Contract Documents provided as Attachment C1 and C2. For each exception, alternative language must be proposed. Owner reserves the right to reject any proposed alternative language.

**SECTION 3 – ADDITIONAL INFORMATION**

- ◆ Please include any additional relevant information that you would like the Owner to consider when evaluating your proposal.

**3. PROPOSAL SUBMISSION**

**1. SUBMITTAL**

Emailed proposals for the Services as described by this RFP package will be received as noted on the cover page. Please name the file “GRPS - Proposal for Commissioning Services”. Proposals received after this date and time may not be considered.

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2. Submit an electronic proposal to [Marc.Alexa@plantemoran.com](mailto:Marc.Alexa@plantemoran.com) ONLY AFTER the noted proposal due date and time.
3. Owner reserves the right to accept or reject any and all Proposals, in whole or in part, to waive any irregularities therein, and to award the contract to other than the lowest proposing Firm.
4. If awarded the Contract, the Firm will execute the proposed Contract and provide all required certificates of insurance that meet the requirements as indicated in the attached Contract, prior to start of any work.
5. All Firms shall be responsible for familiarizing themselves with the information provided. Failure to do so shall in no way incur any delays in work or additional cost to the Owner.

**4. RESPONSIVENESS**

To be responsive, the Proposal must set forth full, accurate and complete information as required by this RFP and all attachments.

**5. ADDENDA**

Any addendum to this RFP will be issued in writing by PMC on behalf of Owner. No information or representation other than that contained in such an addendum, whether received from an employee of Owner or other person, will be considered to have been modified or be grounds for deviation from any stipulation or requirement of this RFP.

**6. LATE PROPOSALS**

Each Firm is responsible for submission of its Proposal. Proposals or proposal revisions received after the Due Date, as listed on the first page of this RFP, may not be accepted or considered.

**7. FORM OF AGREEMENT**

- A. This is a Request for Proposal only. Proposals will be treated as offers to enter into the Contract (as defined within this RFP) with Owner. Owner and successful Firm shall memorialize their contractual relationship and obligations using the form of Contract attached to this RFP. The Contract contains many details regarding the Services required under this RFP, as well as the terms and conditions under which the Services shall be provided by the successful Firm. The Contract should be reviewed carefully by each Firm prior to submitting a Proposal. The final Contract shall be subject to review and approval of Owner's legal counsel.
- B. This RFP is for the purpose of negotiating a Lump Sum Price contract for Commissioning Services as described in the attached Project Overview/Objectives, Attachment A.1. The Standard Form of Agreement between Owner and Commissioning Agent and Terms and Conditions of the Contract will be utilized. This agreement will be directly between Owner and the selected Firm. This RFP along with your Proposal will serve as the basis for a lump sum price commissioning contract for the design, completion and proper function of

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services in its facilities (including training for Owner staff). A Proposal that does not include all costs will not be considered.

**8. DATA CONFLICTS**

Where conflicts occur within this RFP and its contents and addenda, the Standard Form of Agreement, general, supplemental and other conditions, etc. the more restrictive requirements shall govern - all in favor of the Owner.

**9. UNSOLICITED TERMS AND CONDITIONS**

Proposals which take exception to Owner's Terms and Conditions as a whole and substitute the Firm's standard terms and conditions may be rejected.

**10. FEES/TAXES**

All Proposals for the Services, and for all other work thereunder, shall include all applicable taxes, including Social Security, unemployment, and sales or use taxes, and any other taxes specifically levied on the work or on wages by local, city, state, or federal government, except real property taxes on the site. Proposals shall also include all premiums, assessments, and other like payments, charges, and costs incidental to the Services covered by the Contract Documents. No fees or costs shall be incurred or paid by the Owner for labor, professional, reimbursables, etc. accumulated in response to this RFP.

**11. PROPOSAL COSTS**

Any recipient of this RFP, or any Firm who chooses to respond to this RFP, is responsible for any and all costs and liabilities incurred by it, or others acting on its behalf, in: (1) preparing or submitting a Proposal, (2) otherwise responding to this RFP, or (3) negotiating any Contract incidental to its Proposal.

**12. IRREVOCABILITY OF PROPOSALS**

All Proposals submitted may not be withdrawn and shall be irrevocable for a minimum period of sixty (60) calendar days following the Due Date for receipt of Proposals set forth above.

**13. MINIMUM QUALIFICATIONS**

In addition to the other requirements of this RFP, the following minimum qualifications must be met or exceeded by the Firm in order to submit a Proposal:

- A. Firm has been in business for at least the last five (5) consecutive years in the field for which this bid is solicited.
- B. Be licensed to perform the required work in the State of Michigan.
- C. Successful completion of similar services on five (5) or more projects with five (5) or more individual facility sites.
- D. Be familiar with and have experience in the Educational sector including at least three (3) educational clients in the last five (5) years.

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**14. DESIRED QUALIFICATIONS**

It is the Owner's desire for the person(s) designated as the site Commissioning Agents to satisfy as many of the following requirements as possible:

- Self-motivated, proactive, with an attention for detail and ability to complete all tasks in an efficient, organized, and professional manner with minimal oversight.
- Extensive experience in the operation and troubleshooting of HVAC systems, energy management control systems, lighting controls systems and emergency generators.
- Knowledgeable in building operation and maintenance and O&M training.
- Knowledgeable in test and balance of both air and water systems.
- Experienced in energy-efficient equipment design and control strategy optimization.
- Direct experience in monitoring and analyzing system operation using energy management control system trending and stand-alone datalogging equipment.
- Excellent verbal and writing communication skills. Highly organized and able to work with both management and trade contractors.
- Experienced in writing commissioning specifications.
- A bachelor's degree in mechanical or electrical engineering is strongly preferred, and P.E. certification is desired, however, other technical training, past commissioning, and field experience will be considered.
- Membership with the Building Commissioning Association will be considered a plus.

The required expertise for this Project will be based on the skill and experience set of the full team making the Proposal. A member of the Firm will be the designated Commissioning Agent who is the member of the team that will coordinate the commissioning activities from the technical perspective. This party may not necessarily be the team's overall Project or contract manager. The Commissioning Agent must have significant in-building commissioning experience, including technical and management expertise on projects of similar scope. If the Commissioning Agent or Firm does not have sufficient skills to commission a specific system, the Firm shall subcontract with a qualified party to do so. Subcontractor qualifications shall be included and clearly designated in each Firm's Proposal in response to this RFP.

**15. RESTRICTION ON COMMUNICATION**

From the issue date of the RFP until a Firm is selected and selection announced, a prospective Firm shall not communicate about the subject of the RFP or a Firm's Proposal with Owner or any individual member, staff, and employees, except as permitted by the Requests for Clarifications paragraph within the RFP.



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**16. AUTHORITY TO SIGN**

Proposals must be signed by an officer of the Firm who is authorized to enter into binding agreements.

Sincerely,  
PLANTE MORAN CRESA

*Marc Alexa*

Marc Alexa  
Vice President

Attachments: (A1) to (D6) as listed

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ATTACHMENT A1 – PROJECT OVERVIEW/OBJECTIVES  
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**PROJECT OVERVIEW**

Grand Rapids Public Schools (GRPS) passed a \$175M bond program in November 2015.

The scope of the bond includes numerous improvements identified as part of GRPS's 10-year capital plan. The construction portion of the 2015 Bond Program was awarded to multiple A/E and CM teams, with this scope of work awarded as follows:

Innovation Central High School

A/E – Kingscott Associates (KA)

CM – Rockford Construction (RC)

GR Montessori

A/E – Kingscott Associates (KA)

CM – Rockford Construction (RC)

This RFP is being issued to address projects currently in some level of design or construction and only represents a portion of the overall bond program that is intended to be implemented overall. Provided satisfactory performance is achieved at each phase, it would be GRPS's desire to re-engage with the Commissioning Agent for future phases as mutually agreed upon.

**PROJECT OBJECTIVES**

The objective of commissioning is to provide documented confirmation that each facility fulfills the functional and performance requirements of the building owner, occupants, and operators. To reach this goal, it is necessary for the commissioning process to establish and document the Owner's criteria for system function, performance, and maintainability (Design Intent); and to also verify and document compliance with these criteria throughout design, construction, start-up, and the initial period of operation. In addition, complete operation, and maintenance (O&M) manuals, as well as training on system operation, should be provided to the building operators to ensure the building continues to operate as intended.

The Commissioning Agent (CA) should be involved throughout the Project from pre-design through the warranty phase. The primary role of the CA during the overall Design Phases is to develop detailed commissioning specifications and review the design to ensure it meets the Owner's objectives. **It is important to note that although these projects are currently in the design development phase, it is the intent to have the CA review the design documents for design intent as well as functional and performance requirements.** During the Construction Phase, the CA develops and coordinates the execution of a testing plan, which includes observing and documenting all systems' performance to ensure that the systems are functioning in accordance with the Owner's Design Intent (DI) requirements and the Contract Documents. The CA is not responsible for design or general construction scheduling, cost estimating, or construction management, but may assist with problem-solving or resolving non-conformance issues or deficiencies.

***Please note that LEED is ONLY being pursued for the ICHS project and with that, the Design Team wishes to pursue Enhanced Commissioning. There is NO intent to pursue LEED for the GR Montessori project as the work scope is too limited to achieve certification in this building.***

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For the purposes of this RFP, the following systems are intended to be Commissioned:

- All HVAC Equipment & Systems
- Building Automation Systems, Controls and Sequence of Operations
- Lighting Controls – Interior & Exterior
- Emergency Standby Generators (as applicable)
- Domestic Hot Water Systems (as applicable)
- Other Systems as noted

**RFP PROJECT INFORMATION SUMMARY**

**BP #1 – Innovation Central High School & GR Montessori (KA / RC)**

Overview: This project includes renovations to the existing building including boilers, new VUV's and RTU's, BAS / controls, chiller, toilet room renovations, lighting and misc. interior finishes.

Status: This first phase of this project will be issued for bids in December 2021 (including an MEP pre-purchase), with the second phase bidding in February 2022. Project awards are anticipated in January and March of 2022.

Schedule: Exterior renovations and roofing are scheduled for the Summer 2022, with HVAC and interior renovations to be complete by Fall 2023 school semester. The Summer 2022 renovations will primarily consist of new windows, roofing and masonry restoration.

Notable Points: The primary work scopes will take place during Summer 2022 and 2023, with a portion of the non-disruptive MEP work taking place during the regular school year.

**See attached Basis of Design Narrative from Kingscott Architects and Systems Energy Solutions – Exhibit B.1**

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ATTACHMENT A2 – SCOPE OF SERVICES  
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**SCOPE OF SERVICES**

ASHRAE Guideline 0-2019 shall be the basis for the Commissioning Process.

The CA shall be responsible for carrying out the following tasks. The responding Firm is free to suggest changes and improvements to the following task list. It is assumed by the Owner that all of these tasks will be completed by the CA, unless any proposed changes to the following task list are “clearly” highlighted and noted in the Firm’s Proposal. For this proposal, Construction Phase and Warranty Phase Services are required.

**Commissioning Planning and Design Phase Services**

**Design Development (where possible given individual project statuses)**

1. Meet with the Owner, and their consultants, to establish team responsibilities, methods of approval, project procedures and schedule requirements.
2. Consult with the Owner, and their consultants, to determine its criteria and objectives regarding design quality and the Owner’s budget for the Project.
3. Tour the Owner’s existing facilities; review the existing mechanical / electrical systems and operational aspects that may affect the Project.
4. Assist Owner’s architects and engineers in developing specifications for mechanical and electrical system components and controls.
5. Review the Design Development Documents and provide comments to the Owner and their consultants.
6. Develop commissioning requirements, sequences, phasing plans and checklists in conjunction with the Owner and their consultants.
7. Attend Design Development coordination and review meetings as required and requested to assure design solutions meet Project and Owner requirements.
8. Assist Construction Manager in developing Design Development estimates including value engineering as necessary to meet the Owner’s budget.

**Construction Documents**

1. Assist Owner’s architects and engineers in finalizing specifications for mechanical and electrical system components and controls.
2. Finalize commissioning requirements, sequences, phasing plans and checklists in conjunction with the Owner, and their consultants.
3. Attend Construction Document coordination and review meetings as required and requested to assure design solutions meet Project and Owner requirements.
4. Review the final Construction Documents and provide comments to the Owner, and their consultants.
5. Assist AE in developing final bid packages, schedules and phasing plans, scopes of work and general conditions as necessary to meet the Owner’s Program.

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**Bidding Phase**

1. Assist the Owner and its Consultants in reviewing and analyzing bids.
2. Attend pre-bid meetings, post bid interviews and assist in drafting award recommendations.

**Construction Phase, Documentation and Training Phase Services**

1. Perform the tasks and functions in the specifications ascribed to the Commissioning Agent
2. Coordinate and direct the commissioning activities in a logical, sequential and efficient manner using consistent protocols and forms, centralized documentation, clear and regular communications and consultations with all necessary parties, frequently updated timelines and schedules and technical expertise.
3. Coordinate the commissioning work with the Construction Manager and Contractors/Subcontractors, to ensure that commissioning activities are being incorporated into the Project schedule.
4. Plan and conduct commissioning meetings as needed and distribute minutes.
5. Request and review additional information required to perform commissioning tasks, including O&M materials, Contractor start-up and checkout procedures. Before startup, gather and review the current control sequences and work with contractors and design engineers to adjust final testing procedures.
6. Review normal Contractor submittals applicable to systems being commissioned for compliance with commissioning needs.
7. Review requests for information, bulletins, and change orders pertaining to commissioning.
8. Write and distribute construction checklists for commissioned equipment.
9. Develop an enhanced start-up and initial systems checkout plan with Contractors for selected equipment.
10. Perform site visits, as necessary, to observe component and system installations. Attend selected planning and job-site meetings to obtain information on construction progress. Review construction meeting minutes for revisions/substitutions relating to the commissioning process. Assist in resolving any discrepancies.
11. **For terminal heating and cooling devices, a minimum of 25% must be verified for compliance with start-up and operating procedures. If consistent deficiencies are discovered additional devices may require verification.**
12. Verify the completion of the following pre-functional tasks:
  - a. HVAC piping pressure test and flushing, sufficient to be confident that proper procedures were followed. Include testing documentation in the Commissioning Record.

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- b. Ductwork testing and cleaning sufficient to be confident that proper procedures were followed. Include documentation in the Commissioning Record.
  - c. Document construction checklist completion by reviewing completed construction checklists and by selected site observation.
  - d. Document systems startup by reviewing start-up reports and by selected site observation.
  - e. Approve air and water systems balancing by reviewing completed reports and by selected site observation.
13. With necessary assistance and review from installing Contractors, write the functional performance test procedures for equipment and systems. This may include manual functional testing, energy management control system trending and may include stand-alone datalogger monitoring.
14. Coordinate, witness and document manual functional performance tests performed by installing Contractors. Coordinate retesting as necessary until satisfactory performance is achieved. The functional testing shall include operating the system and components through each of the written sequences of operation, and other significant modes and sequences, including startup, shutdown, unoccupied mode, manual mode, staging, miscellaneous alarms, power failure, security alarm when impacted and interlocks with other systems or equipment. Sensors and actuators shall be calibrated during construction check listing by the installing contractors and spot-checked by the Commissioning Agent during functional testing. Analyze functional performance trend logs and monitoring data to verify performance. Tests on respective HVAC equipment shall be executed, if possible, during both the heating and cooling season. However, some overwriting of control values to simulate conditions shall be allowed. Functional testing shall be done using conventional manual methods, control system trend logs, and read-outs or stand-alone dataloggers, to provide a high level of confidence in proper system function, as deemed appropriate by the commissioning Agent and the Owner.
15. Prepare test plans for, assist with execution of, and document tests of commissioned equipment overseen by regulatory authorities and ensure that such tests meet the testing rigor desired by the Owner.
16. Maintain a master issues log and a separate record of functional testing. Report all issues as they occur directly to the Owner's Representative. Provide directly to the Owner's Representative written progress reports and test results with recommended actions.
17. Review equipment warranties to ensure that the Owner's responsibilities are clearly defined.
18. Oversee and review the training of the Owner's operating personnel.
19. Review the preparation of the O&M manuals for commissioned equipment.

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20. Compile a Commissioning Record, which shall include:
- a. A brief summary report that includes a list of participants and roles, brief building description, overview of commissioning and testing scope, and a general description of testing and verification methods. For each piece of commissioned equipment, the report should contain the disposition of the Commissioning Agent regarding the adequacy of the equipment, documentation and training meeting the contract documents in the following areas:
    - i. Equipment meeting the equipment specifications
    - ii. Equipment installation
    - iii. Functional performance and efficiency
    - iv. Equipment documentation
    - v. Operator training
  - b. All outstanding non-compliance items shall be specifically listed. Recommendations for improvement to equipment or operations, future actions, commissioning process changes, etc. shall also be listed. Each non-compliance issue shall be referenced to the specific functional test, inspection, trend log, etc. where the deficiency is documented.
  - c. Also included in the Commissioning Record shall be the issues log, commissioning plan, progress reports, submittal and O&M manual reviews, training record, test schedules, construction checklists, start-up reports, functional tests, and trend log analysis.
21. Compile a Systems Manual that consists of the following: Owner’s Project Requirements (by Owner); Design Narrative and Basis of Design (by Architect); Performance Metrics, if completed during design; space and use descriptions, single line drawings and schematics for major systems (by Architect); control drawings, sequences of control (by Contractor); and a table of all setpoints and implications when changing them, schedules, instructions for operation of each piece of equipment for emergencies, seasonal adjustment, startup and shutdown, instructions for energy savings operations and descriptions of the energy savings strategies in the facility, recommendations for recommissioning frequency by equipment type, energy tracking recommendations, and recommended standard trend logs with a brief description of what to look for in them (all by Commissioning Agent).
22. Review and verify air and water balancing reports for commissioned equipment.

**Warranty Period Services**

1. Coordinate and supervise required opposite season or deferred testing and deficiency corrections and provide the final testing documentation for the Commissioning Record and O&M manuals.
2. Return to the site at 11 months into the 24-month warranty period and review with facility staff the current building operation and the condition of outstanding issues related to the original and seasonal commissioning. Also interview facility staff and identify problems or

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concerns they have with operating the building as originally intended. Make suggestions for improvements and for recording these changes in the O&M manuals. Identify areas that may come under warranty or under the original construction contract. Assist facility staff in developing reports and documents and requests for services to remedy outstanding problems. Provide written report addressing the items noted above.

**Alternate No. 1**

1. Enhanced Commissioning (4 LEED Points)
2. Project must complete the following commissioning process (CxP) activities for mechanical, electrical, domestic hot water, and renewable energy systems and assemblies in accordance with ASHRAE Guideline 0-2005 and ASHRAE Guideline 1.1-2007 for HVAC&R systems, as they relate to energy, water, indoor environmental quality and durability.
  - Review contractor submittals
  - Include systems manual requirements in construction documents
  - Include operator and occupant training requirements in construction documents
  - Verify systems manual updates and delivery
  - Verify seasonal testing
  - Review building operations 10 months after substantial completion
  - Develop an on-going commissioning plan

**Alternate No. 2**

1. Return to the site at 23 months into the 24-month warranty period and review with facility staff the current building operation and the condition of outstanding issues related to the original and seasonal commissioning. Survey interview facility staff and identify problems or concerns they have with operating the building as originally intended. Make suggestions for improvements and for recording these changes in the O&M manuals. Identify areas that may come under warranty or under the original construction contract. Assist facility staff in developing reports and documents and requests for services to remedy outstanding problems. Provide written report addressing the items noted above.