Request for Proposal

Mechanical Air Balancing

November 20, 2008
A. GENERAL INFORMATION

Request for Proposal (RFP) Name: Mechanical Air Balancing

RFP Number: #DM112008

Issue Date: November 20, 2008

Brief Description: The University seeks experienced and qualified firm(s) to provide complete testing, adjusting, and balancing (“TAB”) of HVAC systems, including, but not limited to hydronic heating/cooling systems, chillers, pumps, converters, and other processes within Academic and Health System Buildings on an as needed basis. Provide all material, labor, supervision, tools, equipment, and incidentals necessary for TAB Services for the University of Virginia (“The University”) systems.

Preproposal Conference: An optional Preproposal Conference will be held on Wednesday, December 10, 2008 @ 10:00 a.m. EST at Facilities Management Annex Conference Room, 575 Alderman Road, Charlottesville, Virginia (map may be viewed at this web site: [http://www.virginia.edu/Map/](http://www.virginia.edu/Map/)). The purpose of the Preproposal Conference is to allow potential interested parties an opportunity to present questions and obtain clarification relative to any facet of this RFP. While attendance at this conference will not be a prerequisite to submitting a proposal, interested parties who intend to submit a proposal are strongly encouraged to attend. Bring a copy of the solicitation with you.

Firms planning to attend the Preproposal Conference should notify Rebecca Sims either by email (pur-rfp@virginia.edu) no later than 12:00 p.m. EST on Monday, December 8, 2008 of the names, titles, and phone numbers of the individuals who will attend.

Preproposal Questions: Any questions concerning this RFP must be sent to the buyer listed below no later than 12:00 p.m., Wednesday, January 7, 2009 in order to guarantee a timely response prior to the proposal due date.

Proposal Due Date: 3:00 p.m. EST, Wednesday, January 14, 2009. Proposals may be sent by US Postal Service, Overnight Courier, or hand delivered using the contact information in the box below. All firms will submit five copies of each proposal. The University reserves the right to reject proposals received after the stated due date and time.

Negotiations: Negotiations, if needed, will be held on Wednesday, February 11, 2009 and Thursday, February 12, 2009.

Expected Award Date: March 26, 2009.

Term of Agreement: The term of any resulting Agreement(s) will be for three years, with the ability to renew on the same terms and conditions, for two additional two-year periods if mutually agreeable to the University and the Selected Firm(s). The Selected Firm(s) and the University will mutually agree at least 90 days prior to each renewal period whether to renew the terms of the Agreement.
This Request for Proposal (RFP) has been posted on Procurement Services web site for your convenience. Addenda and attachments are posted if issued. The RFP can be downloaded at this web site: [http://www.procurement.virginia.edu/main/publicpostings/RFP.html](http://www.procurement.virginia.edu/main/publicpostings/RFP.html). It is the firm’s responsibility to ensure the latest version of the entire RFP and related links are reviewed prior to submission of a proposal. We encourage you to check the web site frequently for any changes prior to the due date. Call (434) 924-1346 if you have trouble accessing the RFP from the web. For questions about the content of the RFP, contact the buyer listed above. Additional information can be found on Procurement Services web site: [http://www.procurement.virginia.edu/main/](http://www.procurement.virginia.edu/main/)

For ease of reference, each firm or individual receiving this RFP is referred to as a “firm” and the firm or individual selected to provide services for the University is referred to as the “Selected Firm.” This RFP states the instructions for submitting proposals and the procedure and criteria by which a firm may be selected.

**B. SCOPE OF GOODS & SERVICES**

The University and its Department of Facilities Management seeks qualified firm(s) to provide the following services:

1. Provide TAB work to include, but not limited to, HVAC hydronic systems consisting of setting volume flow rates and adjusting speed controls, recording data, making tests, and preparing written reports.

2. Provide testing and balancing engineers and technicians trained in TAB work and certified by Associated Air Balance Council (AABC) or National Environmental Balancing Bureau (NEBB) to perform all work. The Selected Firm(s’) personnel will have a minimum of ten years of experience, and the test and balancing firm(s) will be in the test and balancing business a minimum of five years. The Selected Firm(s) must be independent, having no affiliation with manufacturers, contractors, or design engineers in order to avoid any possible conflict of interest.

3. Provide follow up procedures in accordance with the latest edition of AABC or NEBB Standards, and American Society of Heating, Refrigerating, and Air Conditioning Engineers (ASHRAE)-1999 HVAC Applications Chapter 36.

4. Provide written reports at the completion of the system balancing to include maintenance recommendations.

5. Work performance standards and rules:
   - Selected Firm(s) will provide testing and balancing to include but not limited to the following areas:
Air distribution (variable air volume and constant air volume)
- Hydronic balancing
- Sound and vibration testing
- Cooling tower performance testing
- Fume hood testing
- Verification of control systems
- Duct leakage testing
- Pre-construction plan check and construction review
- Indoor air quality

- TAB work includes all equipment, distribution systems, and terminal units connected.
- Instruments and measurements will be accurate, and calibration histories for each instrument will be available for examination by the University’s Contract Administrator upon request. Calibration and maintenance of all instruments will be in accordance with requirements of NEBB or AABC Standards.
- A sample of the air balancing report format required for the vivariums is provided in Attachment 3, Sample Vivarium AAALAC Air Balancing Report Format.
- The Selected Firm(s) personnel must wear uniforms at all times to designate their affiliation with the Selected Firm(s). Uniforms will consist of long pants and a shirt (either short or long sleeved) with the Selected Firm(s)’s name and person’s name designated on the upper portion of the shirt. Uniforms must remain consistent for proper identification purposes, and the Selected Firm(s) personnel must wear these uniforms at all times, while on University property. The University requires such identification for security precautions and access will be prohibited, if University personnel do not recognize the identification.

C. BASIS OF SELECTION

Proposals will be evaluated based upon the overall merits/value of the proposal including, but not limited to, price. The University will evaluate proposals, and if a firm is to be selected, select the firm on the basis of:

1. The firm's plan to provide the University with the products as described in the Scope of Good and Services section;
2. The firm’s experience in providing Goods and Services similar to those described in this RFP, to include the firm’s references from clients;
3. The firm’s price proposal; and
4. The firm’s Small, Woman-owned and Minority-owned (SWAM) businesses status and/or the firm’s plan for utilization of SWAM businesses. For more information about SWAM and the University’s SWAM plan, please see the letter at Attachment 1 and refer to the following site: [www.procurement.virginia.edu/main/publicpostings/rfp/SWAMplan.pdf](http://www.procurement.virginia.edu/main/publicpostings/rfp/SWAMplan.pdf)

Note 1: A 10% minimum weight will be given to this criterion in evaluating proposals.  
Note 2: Any questions related to SWAM business and SWAM subcontracting opportunities can be directed to Bill Cooper, the University’s Director of Supplier Diversity, at (434) 924-7174 or [SWAM@virginia.edu](mailto:SWAM@virginia.edu).
D. CONTENTS OF PROPOSAL

Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content, and should be organized in the order in which the requirements are presented in the RFP. Firms should provide the following information:

1. A brief history of the firm and its experience, qualifications and success in providing the type of services requested.
2. A detailed description and the full specifications of the testing, adjusting, and balancing proposed. Each firm should indicate in its proposal the firm’s ability to achieve/comply with each specification. In the event that the firm wishes to propose an alternate specification that, in any way, differs from the above specifications, the firm should detail their proposed change(s) and how the proposed change would compare to the listed specification. Proposals should be formatted in such a way to address each of the above specifications in a line-by-line process.
3. Provide a copy of the firm’s AABC or NEBB active membership certificate.
4. Provide samples of your existing reporting process for TAB services.
5. Information on the warranty associated with the service you are proposing and any extended warranty (include the price) that might be available.
6. The firm’s proposed price/fee for providing the Goods and Services.
7. At least three references of relevant recent completed projects to include, the name of the firm/organization, the complete mailing address, and the name of the contact person and their telephone number.
8. The firm’s Small, Woman-owned and Minority-owned (SWAM) businesses status and/or how the firm intends to utilize SWAM firms in regards to this particular procurement.
9. Provide a list of institutions of higher education with which the firm has signed a term contract.
10. Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of the VASCUPP Members can be found at http://www.vcu.edu/procurement/coopcon.htm

NOTE: Virginia Freedom of Information Act
Except as provided below, once an award is announced, all proposals submitted in response to this RFP will be open to the inspection of any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by firms as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act; however, the firm must invoke the protections of this section prior to or upon submission of its proposal, and must identify the specific data or other materials to be protected and state the reasons why protection is necessary. Firms may not request that its entire proposal be treated as proprietary information.

E. TERMS AND CONDITIONS

This solicitation and any subsequent award is subject to:

- The Selected Firm registering as a vendor with the University of Virginia. 
  [https://www.procurement.virginia.edu/forms/USVendorRegForm.html]
• The Selected Firm registering and accepting eVA Terms and Conditions prior to award. [http://www.eva.virginia.gov/]
• The University’s Preferred Contractual Provisions: [http://www.procurement.virginia.edu/main/publicpostings/rfp/preferredprovisions.pdf]

**Note:** Unless a firm expressly and specifically states its exception to any of the Preferred Provisions in its written proposal, then the proposal from the firm will automatically be deemed to include those Provisions.


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**F. OTHER INFORMATION**

A. Insurance

Listed below is the insurance the Selected Firm must maintain under any Agreement resulting from this RFP. In no event should the Selected Firm construe these minimum required limits to be their limit of liability to the University. The Selected Firm will maintain insurance which meets or exceeds the requirements of the University with insurance companies that hold at least an A-
financial rating with A.M. Best Company. No Agreement will be executed by the University until the Selected Firm satisfies the insurance requirements of the University. The Selected Firm may be required to provide the University with a valid Certificate of Insurance before providing any goods or services to the University. The University reserves the right to approve any insurance proposed by the Selected Firm.

**Comprehensive Commercial General Liability:**
The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of $1,000,000 per occurrence with an aggregate limit of not less than $3,000,000 for products/completed operations and the general aggregate, also with coverage for the following coverage’s:

- **Premises/Operations**
- **Products/Completed Operations**
- **Contractual**
- **Independent Contractors**
- **Personal Injury**
- **Additional Insured**

**Automobile Insurance:**
The Selected Firm(s) and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of $1,000,000 per occurrence with the following coversages for vehicles operated by their employees.

- **Any Automobile**
- **Owned and Non-Owned Automobiles**

**Workers Compensation:**
The Selected Firm(s) and Subcontractor will maintain workers compensation insurance on its employees in accordance with the Virginia Workers Compensation Act, and maintain Employers Liability limits of not less than $500,000.

**Errors and Omissions:**
The Selected firm(s) and any Subcontractor will maintain Professional Errors and Omissions insurance with limits of not less than $1,000,000.
*Additional Insured:
The University will be named as an Additional Insured, and the proper name is: "The Commonwealth of Virginia, and the Rector and Visitors of the University of Virginia, its officers, employees, and agents."
Greetings:

The quality of service the University of Virginia is able to deliver to its customers is directly related to the excellent support we receive from you and many other outstanding suppliers of goods and services. Without you, we would not be able to fulfill our educational, health care and research missions. An important part of our procurement program involves our commitment to doing business with small, women-and minority-owned (SWAM) businesses. As one of our most important vendors, we look to you to help us achieve this objective.

We conduct substantial business with small firms. We have been less effective in securing long-term business relationships with minority-and women-owned businesses. We are determined to improve our record.

I seek your assistance in two areas. First, to the extent practical, I ask that you involve small, women-and minority-owned businesses in the delivery of services you provide to UVa. Second, I seek your help in reporting your results through our quarterly subcontracting reports. The terms and conditions previously provided to your organization outlined this process.

This effort is important to us. We depend on you in so many ways – this is another way that we can partner with your company to make things better.

Sincerely,

Leonard W. Sandridge
Executive Vice President and Chief Operating Officer

LWS:dr

Madison Hall · Post Office Box 400228 · Charlottesville, Virginia 22904-4228
Attachment 2
Firm Information

**Full Legal Name** *(Company name as it appears with your Federal Taxpayer Number)*:

Address:

Telephone Number: FAX Number:

Web Address:

Email Address:

DUNS Number:

**SWAM Information:**
Is your firm certified with the Commonwealth of Virginia’s Department of Minority Business Enterprises (DMBE):

- Minority-Owned Business: Yes No
- Women-Owned Business: Yes No
- Small-Owned Business: Yes No

Is your firm registered as a vendor in the Commonwealth of Virginia’s e-procurement system (eVA):

- Yes No

**Point of Contact for this Proposal:**
Name:
Address:

Office No. Mobile No. FAX No.

Email Address:
HEATING, VENTILATING & AIR CONDITIONING (HVAC) SYSTEM

Summarize the heating, ventilation and air conditioning (HVAC) information for each animal room/support facility indicating: a) source(s) of air, b) air recirculation rates if other than fresh air, c) air exchange rates, d) relative pressure differentials, e) humidity control, and f) date of most recent measurement/evaluation. Information may be provided in another format, providing all requested data is included. HVAC information should be provided from assessments obtained within the past 12 months.

<table>
<thead>
<tr>
<th>Room No</th>
<th>Use</th>
<th>Air Source % Fresh/Recirculated</th>
<th>Treatment Filtered/Absorbers, etc.</th>
<th>Air Changes</th>
<th>Pressure</th>
<th>Humidity Control</th>
<th>Date Assessed</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Surgery</td>
<td>100% Fresh</td>
<td>HEPA</td>
<td>15</td>
<td>+</td>
<td>Y</td>
<td>8/92</td>
</tr>
<tr>
<td>125</td>
<td>Holding Room</td>
<td>100% Fresh</td>
<td>HEPA</td>
<td>12</td>
<td>-</td>
<td>Y</td>
<td>8/92</td>
</tr>
<tr>
<td>135</td>
<td>Holding Room</td>
<td>100% Fresh</td>
<td>Coarse filter/Charcoal</td>
<td>10</td>
<td>-</td>
<td>Y</td>
<td>8/92</td>
</tr>
<tr>
<td>150</td>
<td>Treatment Room</td>
<td>100% Fresh</td>
<td>None</td>
<td>10</td>
<td>-</td>
<td>Y</td>
<td>7/92</td>
</tr>
<tr>
<td>175</td>
<td>Necropsy</td>
<td>100% Fresh</td>
<td>HEPA</td>
<td>15</td>
<td>-</td>
<td>Y</td>
<td>7/92</td>
</tr>
<tr>
<td>200</td>
<td>Cage Wash</td>
<td>30% Recirculated</td>
<td>Coarse filter</td>
<td>15</td>
<td>-</td>
<td>Y</td>
<td>7/92</td>
</tr>
<tr>
<td>210</td>
<td>Feed Storage</td>
<td>30% Recirculated</td>
<td>Coarse filter</td>
<td>10</td>
<td>-</td>
<td>Y</td>
<td>7/92</td>
</tr>
<tr>
<td>215</td>
<td>Storage</td>
<td>30% Recirculated</td>
<td>Coarse filter</td>
<td>08</td>
<td>-</td>
<td>Y</td>
<td>4/92</td>
</tr>
<tr>
<td>300</td>
<td>SPF Room</td>
<td>100% Fresh</td>
<td>HEPA</td>
<td>15</td>
<td>+</td>
<td>Y</td>
<td>4/92</td>
</tr>
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<td>A100</td>
<td>Swine Facility</td>
<td>100% Fresh</td>
<td>n/a</td>
<td>Variable fan</td>
<td>n/a</td>
<td>N</td>
<td></td>
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<tr>
<td>A-12</td>
<td>Pole Barn</td>
<td>100% Fresh</td>
<td>n/a</td>
<td>Climate dependent</td>
<td>n/a</td>
<td>N</td>
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