RFP340-PSC

UNIVERSITY OF LOUISVILLE

PROCUREMENT SERVICES

PERSONAL SERVICES CONTRACT (PSC)
REQUEST FOR PROPOSAL(RFP)

REQUEST DATE:	5/28/25
DUE DATE & TIME:	7/8/25 2:00PM EST
SPEED TYPE:	J6294
DEPARTMENT NAME:	University Planning, Design, and Construction
DEPARTMENT CONTACT:	Brandy Barry
CONTRACT ADMINISTRATOR:	Jamie Peck
CONTRACT SPECIALIST EMAIL:	Jamie.peck@louisville.edu

SERVICE REQUESTED (brief description)	**Commissioning Services; New Health Science Simulation, Academic, and Innovation Facility (HSC)**

EMAIL PROPOSALS TO:
UNIVERSITY OF LOUISVILLE
ATTN: PROCUREMENT SERVICES, SERVICE COMPLEX BUILDING
LOUISVILLE, KY 40292

CONTRACT SPECIALIST NAME: Jamie Peck
EMAIL: Jamie.peck@louisville.edu

THE BOTTOM PORTION OF THIS FORM IS TO BE COMPLETED BY THE VENDOR AND SUBMITTED WITH PROPOSAL

Equal Employment Opportunity – All parties must be in compliance with executive order 11246 of September 24, 1965 as amended by executive order 11375 of October 13, 1967.

STATEMENT OF NON-COLLUSION AND NON-CONFLICT OF INTEREST

I hereby swear (or affirm) under penalty for false swearing as provided by KRS 523.040:

1. That attached Request for Proposal has been submitted without collusion with, and without any agreement, understanding or planned common course of action with, any other vendor of materials, supplies, equipment or services described in the Request For Proposal designed to limit independent competition.
2. That the proposer is legally entitled to enter into the contract with the University of Louisville, an agency of the Commonwealth of Kentucky, and is not in violation of any prohibited conflict of interest, including those prohibited by the provisions of KRS 45A.325, to 45A.340, 45A.990, 164.990, and 164.821 (7).
3. That I have fully informed myself regarding the accuracy of the statements made above.

SIGNATURE:		PRINT NAME	
FIRM NAME:		ADDRESS:	
PHONE:		CITY, STATE, ZIP CODE:	
EMAIL:		WEBSITE:	

REQUEST FOR PROPOSAL COMPONENTS

1. OVERVIEW:

The University of Louisville (University) seeks to build a legacy facility on the Health Science Center (HSC) campus in the heart of Louisville's downtown medical district, affectionately known as the Lou-Med District. This new facility of academic achievement and innovation will enhance the student, faculty, and staff experience through a multitude of engagement opportunities, and foster a revitalized sense of collaboration through interprofessional education in simulation. The vision for the new HSC facility will redevelop land owned by the university into a flagship destination to directly respond to the siloed schools and programs, the deficit of student collaboration space, and lack of modern teaching spaces. This new facility will be the first implementation of the recently created Campus Master Plan, including the relocation of the School of Public Health and Information Sciences, and will set the stage for the long-term vision of reimagining campus.

The University of Louisville (Owner) is inviting proposals for building systems commissioning services for the design and construction phases of the project. The project scope is a 200,000-250,000 square foot multi story building. The program includes a multi-purpose building (Classrooms, Simulation, Student Spaces, Offices, Research) targeting LEED v4.1 BD+C certification.

The commissioning services shall meet all the requirements of the LEED BD+C Fundamental Commissioning Prerequisite and Enhanced Commissioning Credit. Please contact the party issuing the RFP for any questions. The contact details are listed in Proposal Requirements.

The project team consists of the following:

Architect:	Champlin EOP / Perkins + Will
LEED Consultant:	Perkins + Will / CMTA
MEP Engineer:	CMTA
Construction Manager:	TBD

2. SCOPE OF SERVICES:

The owner is committed to commissioning this facility, to systematically optimizing the building and its ancillary systems, and to meeting the requirements of LEED-v4.1EA P1 Fundamental Commissioning and EA C3 Option 1. Path 2 Enhanced and Monitoring-Based Commissioning Path and Option 2 & Building Enclosure Commissioning Option). The commissioning agent is to develop, upload and defend LEED documentation. The Commissioning Agent (CxA) will provide the signed letter template and suitable documents for the required credits before termination of contract which will extend until the LEED Certification is completed with the USGBC, which will not occur until several months after building occupancy.

The commissioning agent will coordinate with the electrical engineer and energy modeler to develop an appropriate design for the LEED Advanced Metering credit.

The CxA will be hired by the owner and report directly to the owner. The CxA shall be independent to the project and may not be an employee of the owner, design consultants, or interested contractor. The CxA will be required to coordinate with the Owner, Architect/Engineer, Construction Manager, and other consultants as needed.

The project is required to achieve LEED Gold Certification at a minimum; However, the project has a goal of LEED platinum and being net zero ready.

Commissioning services consist of systematically documenting that the specified components and systems have been installed and initiated properly, and of functional testing to verify and document proper operation. The CxA shall coordinate with the architect, engineer, contractor and owner on scheduling, and integrate activities into the overall project schedule for commissioning scope as per LEED reference guide.

Systems to be commissioned, as applicable:

The project has not completed design phase, so the final building systems are not known at this time. However, the general system categories to be commissioned are known. The following systems, including all components and controls, are to be commissioned:

1. Heating system equipment and distribution including geothermal wells.
2. Cooling system equipment and distribution including geothermal wells.
3. Air-handling equipment, terminal equipment, air distribution system, and air devices.
4. Ventilation and exhaust systems.
5. HVAC controls.
6. Lighting and daylighting controls.
7. Occupancy controls.
8. Electrical sub-metering systems.

9. Utility sub-metering systems.
10. Domestic hot water system and controls.
11. Building enclosure.

The commissioning services included in fundamental and enhanced commissioning span the time period from Design Phase Kickoff through 12 months after occupancy. The services are farther defined as occurring in "Design Phase" or "Construction Phase."

Table 1 – Design Phase Commissioning

Phase/Milestone	Commissioning Activity	Commissioning Deliverable
CxA Kickoff	CxA Design Phase Kickoff.	Organize & lead CxA kickoff meeting
Design Phase	Develop Owners Project Requirements (OPR) & Basis of Design.	Owners Project Requirements & Basis of Design Document (Updated at SD/DD/CD)
SD	Review SD documents. Attend SD owner review meeting.	Document review comments and notes from review meeting.
DD	Review DD documents. Attend DD owner review meeting.	Document review comments and notes from review meeting.
CD	Review CD documents. Attend CD owner review meeting.	Document review comments and notes from review meeting. Confirm inclusion of Cx requirements in construction documents.
CD	Develop Commissioning specification(s) for inclusion in CD spec book.	Written commissioning specification.
CD	Develop monitoring-based procedures and measurement points for measurement and evaluation of energy-and-water-consuming systems.	Control points to be included in CD design. Written procedures for monitoring.
Design Phase	Complete LEED CxA Documentation for design phase activities.	LEED forms started and drafts completed

Table 2 – Construction Phase Commissioning

Phase/Milestone	Commissioning Activity	Commissioning Deliverable
Construction Phase	Commissioning Plan	Written plan, to be updated throughout construction phase.
Construction Please	Progress Meetings	Attend progress meetings and prepare field observation reports
Construction Phase	Develop Installation & Functional Checklists.	Written checklists, shared with contractors and design team.
Construction Phase	Maintain Issues Log.	Issues log document with open and closed items.
Construction Phase	Building Envelope Test	Written evaluation report, reviewed and shared with the contractor and design team.
Pre-Installation	Review submittals for mechanical, electrical, and plumbing systems and submittals relevant to the building envelope.	Reviewed submittals with CxA comments.
Installation	Installation checklist and equipment startup	Completed installation checklists, with deficiencies noted.
Post-Construction	Systems functional performance testing.	Completed functional performances checklists, with deficiencies noted until remedied.
Post-Construction	TAB Review	Review TAB Report and Sample Readings
Post-Construction	Develop O&M Systems Manual	O&M System Manual.
Post-Construction	O&M Staff Training	Facilitate and document O&M Staff Training
Post-Construction	Commissioning Report	Written Commissioning Report finalized Monitored commissioning plan
Post-Construction	LEED Submittal	Complete LEED forms. Upload the ritten Commissioning Report finalized Monitored Commissioning Plan to LEED Online. Defend submittal and/ or make adjustments to the submittal based on USGBC/ GBCI reviewer comments. Defend the submittal until the prerequisite are credits are earned.
Post-Construction	Monthly Monitoring	Performance data reports monitoring-based commissioning, comparing projected versus actual performance metrics to validate the path to Net Zero.
Post-Construction	Quarterly Functional Testing	Follow-up Report
12 Months into occupancy	12-month post-construction follow up	Follow-up Report
Construction Phase	Complete LEED CxA Documentation for Construction phase activities.	LEED forms completed

A. Fundamental Commissioning Services – LEED Prerequisite (refer to LEED v4.1)
The following services shall be included the scope of work according to the LEED v4.1 EA P1 Fundamental Commissioning:

1. Fully develop a commissioning specification detailing the roles and responsibilities and activities required to commission the facility.
2. Review and document Owner's Project Requirements and Basis of Design
3. Review client space energy-related systems submittals.
4. Develop a commissioning plan and submit it to the team at the outset of the project. Define all activities to be taken up by the CxA and identify a team member to be present for each activity. Include a checklist of all equipment to be tested during construction.
5. The CxA shall provide commissioning specifications.
6. The Mechanical Contractor (MC) and Controls Contractor (CC) shall document the pre-functional checklists and perform startup and initial checkout. The CxA shall then document that the checklists and startup were completed according to the approved plans. This may entail the CxA witnessing the startup of selected equipment.
7. The CxA develops specific equipment and system functional performance test procedures. The functional testing performed by contractors and witnessed by the CxA shall include operating the system and components through each of the written sequences of operation, including heating and cooling modes as well as other identified operational variances. Functional testing shall be done using conventional manual methods, control system trend logs and read-outs, or stand-alone data-loggers, to provide a high level of confidence in the functioning of the system, as deemed appropriate by the CxA and the owner for the applicable systems on the project.
    i. Ventilation: The CxA shall check the physical operation of air-handling units, energy-recovery units, unit ventilators, fan-coil units, rooftop units, exhaust fans, and any other related equipment to ensure that they operate properly and that all air dampers are properly positioned for all sequences. The CxA shall review

the Balancing Report to check that fresh air is delivered in accordance with the design criteria and applicable codes.

ii. Mechanical/Electrical Rooms: The CxA shall check that all equipment operates in accordance with the design criteria, including proper lead/lag operation of pumps, settings of operating limits, outdoor reset schedules, proper domestic hot water production, and performance of any other equipment.

iii. Heating Coils and Terminal Units: The CxA shall check proper operation of all coils, radiation, control valves, and terminal units.

iv. Cooling units: The CxA shall check for proper operation of all cooling equipment, including operating limits and safety settings.

8. Submit a commissioning report to the client at the end of the commissioning process. Outline all systems checks and consequent actions taken as a result of the test outcome. Detail any and all activities and recommendations.
9. The CxA shall conduct a review of contractor submittals for commissioned systems.
10. The CxA develops a construction-phase commissioning plan.
11. The CxA conducts a scoping/kick-off meeting with the construction team members.
12. Additional meetings will be required to plan, scope, coordinate, and resolve problems.
13. Equipment documentation is submitted to the CxA during normal submittals.
14. The CxA shall work with the mechanical contractor, electrical contractor, fire protection contractor, and controls contractor in developing start-up plans and start-up documentation formats.
15. The CxA shall prepare a commissioning report.

B. Enhanced Commissioning Services – LEED Enhanced Commissioning (refer to LEED v4.1) –Include activities for Option 1, Path 2 – Enhanced and Monitoring-Based Commissioning and Option 2
–*Building Enclosure Commissioning.*

1. CxA shall be responsible for the following services in addition to the fundamental commissioning items.
2. The CxA reviews the Operation & Maintenance (O&M) documentation, project reports, and closeout documents for completeness.
3. The CxA reviews, pre-approves, and coordinates the training provided by the mechanical contractor, electrical contractor, plumbing contractor, and controls contractor and verifies that it was completed.
4. Post-Occupancy Check: Include a post-occupancy checkup as part of the commissioning proposal to verify how the building is actually operating between 8-10 months after construction. The CxA shall address a list of "events" or complaints compiled by the owner. This post-occupancy checkup will include verifying that the training requirements have been met and that a plan to resolve outstanding commissioning-related issues has been pursued.
5. The CxA shall develop a systems manual that contains the information necessary to fully recommission the energy-related systems within the tenant space.
6. The CxA shall develop monitoring-based procedures and identify control points to be measured and evaluated to assess performance of energy- and water-consuming systems.
7. The CxA shall commission the building enclosure.

3. <u>REQUIRED PROPOSAL SUBMITTALS:</u>

- Financial Proposal (Fee):
  - i. Provide a lump sum fee for all services as specified in these RFP documents
  - ii. Fee shall include **all expenses**
  - iii. Provide an itemized cost breakdown of the fee:
    - Design Phase Commissioning Activities
    - Construction Phase Commissioning Activities
    - All other assumptions and associated expenses (travel, meetings, etc.)

- Firm Experience and Qualification:
  - i. Provide a minimum of two (2) similar projects (include references) your firm has completed that are similar in nature to the scope of this RFP – higher education facilities or simulation facilities.
  - ii. If any, provide references for experience working in the public sector, specifically with a state University.
  - iii. The contractor shall demonstrate familiarity and relevant experience with the following systems and equipment:
    1. Geothermal systems, specifically well water aquifer heat exchanger systems with submersible pumps (similar to Darcy Solutions)
    2. Active Chilled Beams
    3. 6-pipe modular heat pump chillers
    4. Fume hood exhaust systems (similar to Strobic)
    5. Fume hood controls, including automatic sash closers
    6. Lab air control valves (similar to Phoenix)
    7. Photovoltaic systems
    8. Dedicated outdoor air systems with energy recovery
    9. Medical gas equipment (vacuum, medical air, oxygen, etc.)
    10. SIM lab equipment

- Team Experience
    i. provide an organizational chart and resumes of team members who will be working with the University on this project (going back at least 5 years, if possible) and include references.
    ii. The University would like the original team as provided in your proposal who are assigned to this project remain throughout the duration of the project, if possible.

- Work Plan:
    i. What is your approach to the project to ensure/maximize sustainability?
    ii. Understanding of preliminary information and quality of proposal.
    iii. Methods for project management and delivery

* Cover sheet of this RFP is to be submitted with proposal along with signed addendum(s), if any. The University reserves the right to reject any proposal if all information is not provided as requested in these RFP documents. Do not submit additional terms and conditions with proposals, additional terms and conditions may be cause for the proposal to be rejected.

4. REQUIRED PROFESSIONAL LIABILITY INSURANCE

Prime firm shall carry industry standard, general liability coverage of $1,000,000 per occurrence and $2,000,000 aggregate, automotive liability of $1,000,000, umbrella liability of $2,000,000, workers compensation of $1,000,000, and professional liability of $2,000,000. For fees exceeding the liability limits, the team shall be allowed to utilize the aggregate of coverage among all team members or provide a single policy covering the total fee amount over the life of the contract. UofL shall be made an additional insured on any policies utilized to satisfy the required coverage.

5. METHOD OF AWARD:

Financial Proposal	35 %
Firm Experience and Qualification	25 %
Team Experience	30 %
Work Plan	10 %
TOTAL	**100%**

*A short list for interviews and presentations may be issued if the evaluation committee decides that it is needed for further evaluation of proposers, however, this is not required. The evaluation committee also reserves the right to request interviews from any of the proposers, if needed, for further evaluation.

6. RFP SCHEDULE:

RFP Posted	5/28/2025
Pre-Proposal Conference	6/4/2025 3:00pm EST Location: Health Sciences Campus Abell Administration Building, Room 110 323 E Chestnut St., Louisville, KY 40292
Questions Due	6/11/2025 2:00pm EST
Addendum Posted	No later than 6/18/2025
Proposals Due	7/8/2025 2:00pm EST
Short List Announcement	Week of 7/21/2025 (If required)
Interviews/Presentations	Week of August 4th (If required)
Contract Awarded	Week of August 11th

7. DESIRED CONTRACT PERIOD:

The contract period will be from the date in which the contract is fully executed until all commissioning and administrative services have been completed. Commissioning services will begin upon execution of the contract.

NO SERVICES ARE TO BE PROVIDED PRIOR TO THE START DATE INDICATED ON THE FULLY EXECUTED PSC (sample provided).

8. PRE-PROPOSAL CONFERENCE

There will be a Pre-Proposal Conference on June 4th, 2025, at 3:00 PM, EST. The location is the Health Sciences Campus Abell Administration Building, Room 110, 323 E Chestnut St., Louisville, KY 40292.

The purpose of this meeting is to answer questions pertaining to this solicitation. This meeting is to ensure that each potential proposer has a complete understanding of the scope of work involved. A site walk-through will be conducted during this meeting.

Proposers should show arrive early to find available parking.

Please see the following link for parking information:

https://louisville.edu/parking

9. **FOREIGN CORPORATION REGISTRATION (OUT-OF-STATE CORPORATIONS):**

Pursuant to KRS 271B.15-010, any Out-of-State corporate contractor must be properly registered with the Kentucky Secretary of State, before transacting any business within the state of Kentucky. The statute states "(a) foreign corporation…shall not transact business in this state until it obtains a certificate of authority from the Secretary of State." The registration form and instructions are found at https://web.sos.ky.gov/forms/corp/FBE-Certificate%20of%20Authorization_Foreign%20Business%20Entity.pdf.

10. **RECIPROCAL PREFERENCE:**

In accordance with KRS 45A.490 to 45A.494, a resident Offeror of the Commonwealth of Kentucky shall be given a preference against a nonresident Offeror. In evaluating proposals, the University will apply a reciprocal preference against an Offeror submitting a proposal from a state that grants residency preference equal to the preference given by the state of the nonresident Offeror. Residency and nonresidency shall be defined in accordance with KRS 45A.494(2) and 45A.494(3), respectively. Any Offeror claiming Kentucky residency status shall submit with its proposal a notarized affidavit affirming that it meets the criteria as set forth in the above referenced statute.

Forms can be found at http://louisville.edu/purchasing/forms.

11. **QUESTIONS:**
The University of Louisville will accept questions regarding this RFP only if they are submitted by email no later than June 11th, 2025, by 2:00PM, EST., and are to be emailed to Jamie Peck at jamie.peck@louisville.edu . Answers to the questions submitted will be issued as an addendum and posted to the website location of the RFP https://louisville.edu/purchasing/bids by June 18th, 2025.

12. **COMMUNICATION:**
All communication with the University regarding this solicitation shall ONLY be directed to the Contract Specialist indicated on the first page of the solicitation. **Failure to do so may result in disqualification of submitted proposal.**