



**SOQ24-010**  
**Hillcrest Elementary Commissioning Contracting Agent (CxA)**

**Required Method is to Submit Electronic Copies through the Utah Public  
Procurement Place - SciQuest**

**Due by 2:00 p.m. MST on Friday, February 2, 2024**

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**OGDEN SCHOOL DISTRICT**  
**SOQ24-010 - Hillcrest Elementary Commissioning Contracting Agent (CxA)**

**STATEMENT OF QUALIFICATIONS**

**I. INTENT OF STATEMENT OF INTEREST AND QUALIFICATIONS**

The purpose of this Statement of Qualifications (SOQ) is to select a Commissioning Contracting Agent (CxA) for the Ogden School District (OSD) Hillcrest Elementary Rebuild Project that was approved December 14, 2023. This SOQ is designed to provide interested CxAs with sufficient basic information to submit proposals meeting minimum requirements, but is not intended to limit a proposal's content or exclude any relevant or essential data. CxAs are at liberty and are encouraged to expand upon the specifications to evidence service capability under any agreement.

**II. ELIGIBILITY REQUIREMENTS**

A. Licensed

The proposing CxA must be properly licensed to conduct business in the State of Utah.

B. Non-Discrimination

The proposing CxA must comply, at all times during the bidding and contracting period, with all applicable federal, state, county, and city anti-discrimination laws, ordinances, rules, and regulations. Any violations of this provision shall be considered a violation of a material provision of the audit contract and shall be grounds for cancellation, termination or suspension.

**III. GENERAL INFORMATION**

A. Bid Information

All bid documents, including drawings, and addenda will be available on SciQuest. Proposal information should be contained within Schedules A, B, C and D.

B. OSD Contacts

Bidders shall not unduly contact or offer gifts or gratuities to owners, users, or selected committee members in an effort to influence the selection process. This prohibition applies before the bidding documents are issued as the project is developed, and extends through the award of a contract. Failure to comply with this requirement may result in a disqualification.

C. Inquiries

All inquiries relative to this SOQ must be submitted through SciQuest and will be answered through SciQuest up to the Q & A deadline.

D. Addendum to SOQ

If it becomes necessary to revise this SOQ in whole or in part, an addendum will be posted on SciQuest. CxAs who obtained this SOQ by download are required to check SciQuest for any addenda.

E. Right of Rejection

The OSD Board of Education reserves the right to reject any and all proposals or to waive any non-statutory informality. The Board of Education further reserves the right to make the contract award deemed by the Chief Procurement Officer of OSD to be in the best interest of the district. The Board's decision to accept or reject the proposal shall be final. Furthermore, OSD reserves the right not to award a contract to a CxA where OSD has determined the CxA may not have the capability to perform based on current OSD project(s) that are not on schedule and/or over budget. Finally, OSD may or may not proceed with the project according to the district's budget.

F. Contract Award

Once the board has approved a recommended CxA, a contract may be awarded on a project by project basis or all projects together.

G. Contract Terms and Conditions

The contract must be performed in accordance with OSD Standard Terms and Conditions. See attachment in SciQuest.

H. Contract Termination

The Board reserves the right to use the next lowest responsive and responsible CxA in the event the original awardee of the project cannot fulfill their contract. The next lowest CxA's prices must remain the same as originally bid and must remain secure for the duration of the contract.

I. Contract Period

This agreement shall commence on the date of the SOQ award posting on SciQuest and continue for one (1) year or until the listed projects are completed. Each proposal must include an option whereby OSD, in its sole discretion, can extend the contract for up to four (4) additional years on the same terms, prices, and conditions set forth in the proposal. The option shall be exercisable at the end of the first year. If the option is not exercised, then the contract shall automatically expire at the end of the contract term. Notice of exercise of the option must be given at least thirty (30) days prior to the end of the contract term.

#### **IV. PROPOSED SERVICES**

The scope of work includes the commissioning process activities for mechanical, plumbing and assemblies, and lighting control in accordance with IECC 2021 and the IBC 2021.

The CxA responsibilities shall include:

- A. Review the project documents, as provided by the design team for building energy systems included in the project commissioning.

- B. Develop and implement a commissioning plan.
- C. Provide project-specific construction checklists and commissioning process test procedures for actual HVAC&R, and plumbing systems, assemblies, equipment, and components to be furnished and installed as part of the construction contract.
- D. Perform installation inspections to verify the construction checklists have been completed and the system components are installed properly. For each type of installed component, the CxA shall verify 10% of all completed checklists submitted by the contractor and not less than one checklist for each component type.
- E. Visit the construction site regularly to review the installation of all HVAC and lighting control equipment.
- F. Review Test and Balance Report to verify testing, adjusting, and balancing of work are complete.
- G. Verify test execution of HVAC equipment and witness functional performance testing of 100% of all the building HVAC systems to ensure proper operation of each system in accordance with the project construction documents.
- H. Verify test execution of lighting control equipment and witness functional performance testing of 100% of all the building lighting control systems to ensure proper operation of each system in accordance with the project construction documents.
- I. Maintain an Issues and Benefits Log through the commissioning process. The CxA shall notify the owner, architect, and general contractor of any discrepancies within 48 hours of discovery.
- J. Prepare and maintain completed installation/start-up report log.
- K. Oversee training for OSD personnel.
- L. Prepare a final commissioning process report. Document all findings and recommendations, and report directly to the owner throughout the process.

## **V. SUBMITTING YOUR PROPOSAL**

- A. The proposal and supplemental information must be received by the Ogden School District Purchasing Department by 2:00 pm MST on Friday February 2, 2024. The submitting firms shall provide one (1) electronic copy of their proposal through the Utah Division of Purchasing Public Procurement Place U3P's (SciQuest) online submission portal.
- B. Proposals must be signed by the CxA's authorized official binding the proposal and the firm for a period sixty (60) days from the date of receipt.
- C. Delivery means and methods for the submission of the qualification offerings are the sole responsibility of the CxA. All preparation costs and any associated activities related to this bid are the sole responsibility of the CxA. OSD is not liable for any costs incurred throughout the entire selection process.

- D. All information requested must be completed and submitted by the date and time listed in SciQuest. Proposals received after that will be deemed non-responsive. Neither faxed or emailed bids will be accepted.
- E. Each CxA shall submit only one (1) proposal. Alternate or multiple proposals from a single CxA are prohibited. Where multiple proposals are submitted, that CxA may be deemed non-responsive.
- F. Any submitter may designate those portions of the proposals which contain trade secrets or other confidential matters that the Governmental Records and Access Management Act (GRAMA) would allow to be a protected record. Any disclosure of submittals or portions thereof shall be in accordance with GRAMA and State law. A completed Claim of Business Confidentiality Form and a redacted copy of the RFP submission shall be included with the Firm's RFP response and uploaded to SciQuest.

## **VI. EVALUATION CRITERIA**

The committee will base their evaluation on the criteria listed below. The proposing CxAs must use the following schedules, or copies thereof, in submitting a proposal. The schedules must be completed in their entirety. Other materials that support these schedules may be included in the proposal.

- A. 25 Points: Statement of Qualifications and Certified Proposal (Schedules A & B)
- B. 25 Points: Project Management Plan & Team (Schedule C)
- C. 20 Points: References (Schedule D)
- D. 30 Points: Cost Proposal (Schedule E) - must be in a separate attachment

## **VII. PROPOSAL RESPONSE FORMS**

A proposer must use the following schedules, or copies thereof, in submitting a proposal. The schedules must be completed in their entirety. Other materials that support these schedules may be included in the proposal document.

- Schedule A - Certification of Proposal
- Schedule B - Statement of Qualifications
- Schedule C - Project Management Plan & Team
- Schedule D - References
- Schedule E - Cost Proposal (must be in a separate attachment)

**Schedule A**

**CERTIFICATION OF PROPOSAL**

We have read the SOQ for Hillcrest Elementary Commissioning Contracting Agent (CxA) for the Ogden School District and fully understand its intent. We certify that we have adequate personnel and resources to fulfill the proposal requirements. We further understand that our ability to meet the criteria and provide the required services shall be judged solely by OSD.

We further certify that, since the receipt of this SOQ, no contact, discussion, or negotiations have been made nor will be made regarding this offering with any OSD employee or Board member. We understand that any such contact could disqualify this proposal.

We further certify that we are properly licensed to conduct business within the scope of this SOQ, in the State of Utah.

We certify that all schedules and addenda contained herein shall be considered part of the entire SOQ response and that the complete document submitted shall be considered a legally binding document.

Submitted By (please print):	
Supplier Name:	
Authorized Signature:	
Name and Title:	
Telephone Number:	
E-Mail Address:	
Date:	

## **Schedule B**

### **STATEMENT OF QUALIFICATIONS**

This section should include the following:

- A. A description of the financial viability of the CxA.
- B. A description of the experience of the CxA with similar K-12 facilities within the last five (5) years (system experience shall be typical of boiler/chiller, VAV, multi-zone, and 4-pipe fan coil systems, including related ATC and electrical, power, and security systems similar to existing systems throughout OSD).
- C. A description of the specific project manager and site superintendent that will be assigned to work with OSD.
- D. Examples of similar projects completed by the CxA and the specific project manager and site superintendent assigned to work with OSD.
- E. A description of the CxA's areas of expertise and other special qualifications as they pertain to this project.
- F. A description of the CxA's track record of completing projects on time and within budget.
- G. A documentation of the CxA's reputation and commitment to high-quality workmanship.



## **Schedule C**

### **PROJECT MANAGEMENT PLAN AND TEAM**

This section should include the following:

- A. A company history and profile including, but not limited to, years in business, location of office(s), and size of company.
- B. A description of the administration.
- C. A description of the support staff & level of certification including, but not limited to, education, certification, and training of all key personnel, as well as any technical and unique capabilities of the company.
- D. A list of any subcontractors to be used, if applicable.

## Schedule D

### REFERENCES

The CxA shall submit five (5) references. If possible, these should be of similar school districts or institutions, including: the name of the school district or institution, phone number, business address, and the name of a contact person.

Reference 1	
Name of School/Institution:	
School/Institution Address:	
Contact Name:	
Contact Phone:	

Reference 2	
Name of School/Institution:	
School/Institution Address:	
Contact Name:	
Contact Phone:	

Reference 3	
Name of School/Institution:	
School/Institution Address:	
Contact Name:	
Contact Phone:	

**Schedule D, Continued**

<b>Reference 4</b>	
Name of School/Institution:	
School/Institution Address:	
Contact Name:	
Contact Phone:	

<b>Reference 5</b>	
Name of School/Institution:	
School/Institution Address:	
Contact Name:	
Contact Phone:	

**Schedule E**

*(Must Be Submitted Separate For Other Required Documentation)*

**COST PROPOSAL**

Location	Amount
Grand Total for All Locations	