

[COMPANY LOGO]

[FACILITY NAME]

REQUEST FOR PROPOSAL

RETRO / EXISTING BUILDING COMMISSIONING

[PROJECT NAME]

[PROJECT NUMBER]

**Table of Contents**

**SECTION I – INTRODUCTION .....3**

**SECTION II – INTENT + SCOPE OF CONSULTANT SERVICES .....3**

**SECTION III – PROJECT SCHEDULE .....6**

**SECTION IV – PROPOSAL REQUIREMENTS.....6**

**SECTION V – SUBMISSION REQUIREMENTS .....7**

## SECTION I – INTRODUCTION

The [COMPANY] requests proposals from qualified consultants to provide **Retro-Commissioning (RCx) / Existing Building Commissioning (EBCx)** services for [PROJECT NAME], a [details of project size/scope], located at [street address of project location]. Systems to be retro-commissioned are HVAC equipment, building controls, and lighting control systems. The goal of this project is to reduce annual energy use, emissions, and operating costs at the [PROJECT NAME], while improving building performance and occupant safety & comfort.

The project directly supports [COMPANY] in achieving carbon neutral operations no later than 20##, adapt and improve the resiliency of operations and local community to climate change, and align climate initiatives to the [COMPANY’S] vision.

## SECTION II – INTENT + SCOPE OF CONSULTANT SERVICES

The selected consultant (“CONSULTANT”) shall provide the following services as specified per the standard and terms and conditions of (COMPANY T&C).

### 1. Intent

- a. **Retro-Commissioning (RCx) / Existing Building Commissioning (EBCx)** is a process that involves an assessment of building systems to ensure they operate correctly while considering the original design and any changes since construction was completed. RCx ensures the building’s energy systems and equipment are operating at optimal performance. Retro Commissioning should lower building operating costs by reducing electric demand, energy consumption, and maintenance complaints through increased occupant comfort and improved equipment asset lifecycle.
- b. Systems to be Commissioned
  - i. Central Cooling Systems (Chillers, Cooling Towers, Associated Pumps, and Ancillary Equipment)
  - ii. Central Heating Systems (Boilers, Heat Exchangers, Associated Pumps, and Ancillary Equipment)
  - iii. Air Handling Units / Roof-Top Units
  - iv. Terminal Equipment
  - v. HVAC Packaged Systems
  - vi. Exhaust Systems
  - vii. Lighting Control Systems
  - viii. Building Automation Systems (BAS) associated with systems above
  - ix. (\*Optional – attach a complete list of detailed building equipment and systems to be commissioned)

### 2. Scope + Stages

- a. **Stage 1 – Planning** – Develop and confirm the Owner’s needs and requirements for the facility and document through the development of the Current Facility Requirements (CFR).
  - i. Facility Discovery - Interview end users/facility team, observe the current operational state of the building and document the requirements. Gain an understanding of the

requirements in different spaces within the building(s) and any operational problems experienced.

1. Review existing drawings, specifications, test and balance reports, O&M manuals, maintenance document records, etc., as required to gain an understanding of the building systems to be commissioned.
  - ii. FCA Asset Capture – Assess all MEP and non-MEP equipment (full asset list below). Gather information, capture images, record detailed notes of major facility problems.
  - iii. FCA Data Validation – Research asset information, completion of incomplete assets to ensure accuracy and accountability of the data
  - iv. Preliminary Energy Analysis: RCx Incentives/Rebates – Complete and submit Energy Rebate/Incentives applications along with final negotiated scope of work (determined by local energy providers and available incentives)
  - v. Develop the RCx Plan – Define roles, responsibilities, scope of work, and desired goals.
- b. **Stage 2 – Investigation** – Document and perform functional performance testing on individual equipment and primary systems. The equipment and systems to be tested are outlined with the sampling rate for equipment with a large quantity.
- i. RCx Coordination - # Meetings to review status and follow-up to improve building operations
  - ii. Perform a Site Assessment – Review the Sequence of Operations and perform Functional Testing. Gain an understanding of how building systems and equipment are currently operating and being maintained, explanation of current asset operations, and what the facility staff considers to be the most significant problems. The site assessment shall include the following:
    1. Overall building energy use and demand and areas of highest energy use and demand.
    2. Current design and operational intent including actual control sequences for each piece of equipment included in the project.
    3. Equipment nameplate information and equipment issues.
    4. Current schedules (setpoint, time of day, holiday, etc)
    5. The most severe and control and operational issues.
    6. Location of the most common occupant comfort problems or recurring trouble spots within the building(s)
    7. Current O&M practices
  - iii. Develop Issues Log – Document issues discovered during testing and work with controls contractors to remedy each problem
  - iv. Provide ECMs – Based on data collected, prepare an updated master list of Energy Conservation Measures (ECMs)
    1. Calculate annual energy savings for identified ECMs
    2. Estimate costs to implement and payback period of each ECM
  - v. Documentation –
    1. Identify documentation enhancement needs for the systems included in the RCx project.

vi. ECM List + Audit Report

1. Prepare the **[ENERGY INCENTIVE ENROLLMENT]** Audit Report, describing the services performed and summarizing the recommendations and results.
  2. Meet with Owners and contractors (if applicable) to review the **[ENERGY INCENTIVE ENROLLMENT]** Audit Report and assist in selecting ECMs for implementation. The **[ENERGY INCENTIVE ENROLLMENT]** Audit Report should include, but not limited to:
    - a. Results of site assessment
    - b. Diagnostic and monitoring plan
    - c. Exiting systems sequences of operation
    - d. Trend logs/data
    - e. Completed functional test forms
    - f. Updated listing of deficiencies found and ECMs identified with written description of work required to implement each ECM
    - g. Supporting energy savings calculations based on engineering estimates
    - h. Probable implementation cost for each ECM based on engineering estimates
    - i. Project Meeting Minutes
    - j. Project Progress Reports
  3. Audit phase deliverables include:
    - a. **[ENERGY INCENTIVE ENROLLMENT]** Audit Report
      - i. And any required submittals for Energy Incentive invoice approval/submittals/other
    - b. Completed **[ENERGY INCENTIVE ENROLLMENT]** Workbook Template
      - i. Including any correction to submittals to ensure Energy Incentive pre-approval for implementation
- c. **Stage 3 – Implementation** – Implement ECMs and correct items on issues log. Meeting with Owner to prioritize ECMs, Capital Projects, and completion of Issues Log.
- i. Implementation Coordination - # Meetings to review status and follow-up items to improve building operations
    1. Answer questions from Owner and contractors regarding Audit Phase deliverables including ECM implementation descriptions
    2. Upon notification of ECM implementations, direct the collection of BAS trend logs, spot temperature and power measurements, etc, to verify savings from ECMs
    3. Update energy savings calculations for implemented measures
    4. Collect and compile ECM implementation invoices
    5. Upon Owner review and approval, update and submit **[ENERGY INCENTIVE ENROLLMENT]** workbook template with savings verification, updated calculations, and implemented invoices to **[ENERGY INCENTIVE ENROLLMENT]**.

- ii. Facility Guide – Final report documenting the system operations and sustainability goals
- iii. Capital Project – Review Capital Project lists and determine which projects require Feasibility Studies to validate construction costs and project viability
- d. **Stage 4 – Sustaining + Verification – This phase ensures a smooth hand-off and transition from the Retro Commissioning to the facility teams. This includes monthly meetings to discuss operations training, documentation, and issue tracking.**
  - i. Documentation Delivery – Ensure all documents have been received by the facility team.
  - ii. Issue Resolution – Work with Owner to complete issues with the controls contractor. Bring in additional contractors to address repairs, where necessary.
  - iii. Facility Training – Provide training for Facility/Operations team to understand their documentation and systems serving their facility

SECTION III – PROJECT SCHEDULE

DATE	MILESTONE OR DELIVERABLE
MM/DD/YYYY	Pre-Proposal Meeting (time)
MM/DD/YYYY	Consulting Firm proposals due (time)
MM/DD/YYYY	Notification to select Consulting Firm
MM/DD/YYYY	Contract Awarded
MM/DD/YYYY	Project Launch
MM/DD/YYYY	Project Close Out

SECTION IV – PROPOSAL REQUIREMENTS

Each proposal shall conform to [COMPANY] guidelines [include any specific external forms required].

- a. **Cover Page:** Include project number (##-###) and name, project location, Proposer’s name/Firm, address, phone number, email address, proposal date, etc.
- b. **Table of Contents:** Include a clear identification of the material by section and page number.
- c. **Letter of Transmittal:** The name and description of the organization submitting the proposal. Include the name, size, legal status (corporation, partnership, etc.), professional registration/certification, and major type of activity or areas of consulting. The organization must be licensed to operate in the State of [STATE]. Include a copy of current license, certification, and/or registration.

- d. **Description of Firm's Experience:** Include a list of similar projects the consultant has participated in during the past five (5) years. Attach a separate sheet for each project, up to five, giving brief description of each project, the proposer's participation, ad client contact reference and phone number. Provide a list of three (3) references that can be contacted regarding your past work.
- e. **Project Organization and Staff Experience:** Include an organizational structure of the project team, including the relationship of any sub-consultants to be used for this project. Include the name of Principal in Charge of this project along with the name, occupation, and title of the Project Manager who will oversee the project. Include a one-page resume for all team members involved in the project (name, title, project responsibilities, professional registration, qualifications, and related experience).
- f. **Sub-Consultants:** Indicate names and addresses of any sub-consultants and/or associates proposed to be utilized in this project. Outline their role in this project and their related experience.
- g. **Project Approach:** Provide a general description, methodology, tools, and techniques of your approach to each project task. Provide a description of challenges you anticipate in the project and your strategies to overcome them. Discuss your staffing plan.
- h. **Add Alternate (optional):** Include any additional resources not listed in this RFP that would benefit this project and the overall interest for the Company.
- i. **Project Schedule to Completion:** Provide a timetable and relationship of tasks that are necessary to initiate and complete this project as noted in "Project Schedule" section of this RFP.
- j. **Fee Proposal:** The fee for this project will be clearly stated as **[COMPANY TERMS AND CONDITIONS]**

## SECTION V – SUBMISSION REQUIREMENTS

- a. **Proposals must be submitted via email by Month, day 20## at #:00 EST to: [CONTACT, TITLE, EMAIL]**
- b. Each proposal submitted must be attached as a single PDF and titled as "Consultant Name-RCx Proposal-PROJECT NUMBER"
- c. Proposals must respond to each component as listed in Section IV, Proposal Requirements, in order as presented, and the form or format requested. Each response must identify the heading and respond to each segment without reference to any other part of the proposal.

**Please direct any questions about this RFP to [CONTACT, TITLE, EMAIL]. The [COMPANY] reserves the right to not respond to questions received after Month, day 20## at #:00 EST.**

### Attachments:

- a. List as needed...
- b.