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State of Idaho  
Department of Administration  
Division of Public Works

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August 8, 2023

REQUEST FOR QUALIFICATIONS

TO: Testing, Adjusting, and Balancing (TAB) Firms

FROM: PAT DONALDSON, Administrator  
Division of Public Works

A handwritten signature in blue ink, appearing to read "Pat Donaldson", with a smaller signature below it.

SUBJECT: Regional Small TAB Projects, STATEWIDE

Submittals will be received at the Division of Public Works, 502 N. 4th Street, P.O. Box 83720 Boise, Idaho 83720-0072 until **September 19, at 2:00 p.m.**, for furnishing TAB services to the State of Idaho.

Questions that arise as a result of this Request for Qualifications should be addressed to:

Jessica Rodriguez, Project Manager  
Division of Public Works  
P.O. Box 83720  
Boise, Idaho 83720-0072  
(208) 332-1920

**DESCRIPTION OF PROJECT**

Annually the State of Idaho, Division of Public Works constructs several projects, which require Testing, Adjusting, and Balancing services. Services will relate to projects where the estimated TAB fee plus reimbursable expenses do not exceed a set amount established by the Permanent Building Fund Advisory Council. The present limit is \$50,000 per project. Total fees to be authorized under these regional contracts will depend on legislative or agency funding and could vary greatly from region to region. The contracts are intended to be for a **three-year period**. TAB Firms will be selected for services across the State of Idaho.

Types of TAB projects that may be anticipated involve Testing, Adjusting, and Balancing of heating, ventilation, air conditioning, and plumbing circulation systems on State of Idaho Public Work's projects. Projects typically range in size and scope from new smaller and larger buildings, building additions and

alterations and repairs to existing facilities. The TAB Firm will furnish all labor, materials, tools, and equipment necessary for performing related Testing, Adjusting, and Balancing services. On occasion, other related but more specific services may also be required.

The TAB Firm may be asked to meet on a regular basis with the DPW Project Manager, DPW Field Representative, Mechanical Engineer, General Contractor, Mechanical Contractor, Commissioning Agent, and others on the Design and Construction Team for the purpose of providing a verbal and/or written report of the testing results. The TAB Firm will provide written copies of log and balancing data to the State and others as requested.

The ability to execute these small projects on short notice in a reasonably short time is a major concern. On-site administration is frequently required for these small projects, particularly when emergencies and critical timelines exist.

TAB Firms will be selected for services statewide, to include all of the areas listed below. A total of number (4) contracts are anticipated to be awarded.

**North Idaho:** Lewiston, Moscow, Orofino, Coeur d'Alene area north to the border with Canada. State institutions within this area include the University of Idaho, Lewis-Clark State College, Lewiston State Office Building, State Hospital North, North Idaho Correctional Institution, North Idaho College, and regional offices of the departments of Health & Welfare, Lands, Fish and Game, Transportation, and Labor.

**Southwest Idaho:** McCall, Boise, Nampa, Caldwell, Twin Falls, Burley, Gooding, and Jerome including the Capitol Mall, Chinden Campus, Idaho Correctional Institution, Health & Welfare and Agriculture Laboratories, Idaho State School & Hospital, Boise State University, College of Southern Idaho, Deaf and Blind School and other state buildings in the area.

**Southeast Idaho:** Pocatello, Blackfoot, Idaho Falls and St. Anthony area including Idaho State University, State Hospital South, College of Eastern Idaho, Idaho Falls State Office Building, State Juvenile Correction Center, and regional offices of the departments of Health & Welfare, Lands, Fish and Game, Transportation, Correction, and Labor.

## SUBMITTAL CONTENT

- A. Basic Qualifications (10 points):** Provide basic data relative to firm's size, history, personnel, and special expertise. Company resumes, awards, associations, etc., may be included.

The Division of Public Works reserves the right to investigate and confirm the candidate's financial responsibility. This may include financial statements, bank references, and interviews with past consultants, employees and creditors. Unfavorable responses to these investigations are grounds for rejection of the submittal.

- B. Specific Qualifications (20 points):** List the team expected to accomplish this work. Describe who will perform the various tasks, the amount of their involvement and responsibilities and give their qualifications. Provide a list of at least five (5) projects, with brief descriptions which show ability to complete projects of this scope.

**C. Technical Qualifications (10 points for each item below for a total of 40 points):**

- a. Quality Assurance: Identify the firm's NEBB or TABB certifications. Separately identify all NEBB or TABB certified professionals and technicians responsible for conducting the work, including supervisory staff. Include information on how the firm maintains their staff's continuing education and compliance for certification renewal.
- b. Provide two project examples where TAB work was performed by the NEBB or TABB certified personnel identified in B. Specific Qualifications, describe the scope, deliverables and what NEBB and TABB standards were met. In addition to the two project example descriptions, include a list of various relevant projects and identify whether DPW projects.
- c. Please list and identify different areas of testing your Firm is qualified to perform. For example, Fume Hood Performance Testing, Sound Measurement, Vibration Measurement, Cleanroom Performance Testing, etc., and include one project example. In addition, please list the various types of Facilities, existing or new, where your firm has performed TAB services.
- d. This being a Statewide Contract, please describe how your firm will manage and perform the work in the three state regions identified (SW, SE, and N). Indicate the location(s) of the office where the services will be performed.

**D. Format (5 points):** To assist evaluation, it is desirable to format the submittal similar to the headings listed above. The submittal should be clear and to the point. Font shall not be less than 11 points. Emphasis should be placed on specific qualifications of the people to actually perform the services.

## **SUBMITTALS**

Submit four (4) bound copies and one (1) USB flash drive of the submittal at the time and place specified. The submittal shall clearly identify the point of contact regarding the submittal as well as new work to be identified on the DPW Directory, with e-mail address and phone number listed. Failure to identify a point of contact may render submittal non-responsive.

## **EVALUATION**

An evaluation committee consisting of two people from the Division of Public Works and two people from various State Agency staff will review and score the submittals. Following initial scoring, interviews with the top ranked firms in each area may be conducted.

The ranking process is accomplished in two steps: 75 points for the Initial Scoring based on the written submittal, and 25 points for a Final Ranking based on an interview. Step one: The selection committee will score the written submittals based on the criteria in the Qualification Statement Content and the top teams will be invited for an interview. The scores will be based on the tables below.

<b>Written Point Scoring</b>		
	Criteria	Maximum Possible Points
A	Basic Qualifications	10
B	Specific Qualifications	20
C	Technical Qualifications – 10 pts for each item	40
D	Format	5
Written Total		75
<b>Presentation – Interview Point Scoring</b>		
	Criteria	Maximum Possible Points
	Competency and abilities to address the items above in the written RFQ submittals.	20
	Selection Committee’s Q & A	5
Presentation – Interview Total		25

After interviewing the selected candidates, the evaluation committee will provide scores to be added to the submittal scores to determine the final scores.

It is anticipated that selection will be for firms that maintain an office within or near each geographic area; however, qualifications may result in some deviation.

**AWARD**

Based on the combined results of the evaluation committee, the Division of Public Works will recommend a course of action to the Permanent Building Fund Advisory Council at their schedule December 5, 2023, meeting. If the ranking is approved, a notice of intent to negotiate will be issued to the Design Professional by the division of Public Works, Department of Administration in accordance with prescribed procedures. Final award is contingent upon the successful negotiation of a contract.

**PROPOSED DATES:**

- Receive Submittals: September 19, 2023, 2pm
- Interviews: Between October 19 and October 23
- Review by PBFAC: December 5, 2023
- Negotiate contracts: December 2023 – January 17, 2024

**PROVISIONS:**

The contents of the submittal may be used in a legal contract or agreement. Candidates should be aware that methods and procedures proposed could become contractual obligations. A sample agreement of standard terms and conditions is available from the Division of Public Works. TAB Professional will be required to sign an agreement including the State’s standard terms, including a requirement to carry and maintain a minimum of \$1,000,000 professional liability insurance coverage. Candidates must be certified by the Testing, Adjusting and Balancing Bureau (TABB) and/or the National Environmental Balancing Bureau (NEBB). The State reserves the right to reject any or all submittals received as a result of this request.

The State may also negotiate separately with any source in any manner necessary to serve the best interests of the State of Idaho. Awards will be made on the basis of submittals resulting from this request and subsequent interviews.

**END OF RFQ for TAB Firms**