Procurement
300 Turner Street NW
North End Center, Ste 2100
Blacksburg, Virginia 24061
P: (540) 231-6221 F: (540) 231-9628
www.procurement.vt.edu

August 28, 2024

Smart Building Strategies LLC
Vahid Kompany
22264 Philanthropic Dr
Ashburn, VA 20148

Dear Vahid,

Subject: Contract Renewal Letter

Virginia Tech Contract #:	VTS-1851-2023
Commodity/Service:	Commissioning and Audit Services
Renewal Period:	9/1/24 - 8/31/26
Renewal #:	(1 of 3) two-year renewal

In accordance with the renewal provision of the original contract, the university would like to renew the contract for an additional term. Please advise concerning your intention by signing in the appropriate space below. A signed copy of this letter should be received in Procurement by ASAP.

If allowed by the contract, price adjustments must be requested at the time of renewal in accordance with the contract documents. Price adjustments are not automatic or retroactive and are only implemented upon request by the vendor at the time of renewal.

In addition, review the attached form which shows your company information as listed in the university's vendor database. If any of this information has changed, make corrections directly on the form, and return with this letter. It is essential this information be accurate for payments to be processed in a timely manner.

Virginia Tech recommends that our vendors utilize the Wells One AP Control Payment System for payment of all invoices and strongly encourages all vendors under contract with the university to participate in this program. If your firm is not enrolled in the program, refer to our website: http://www.procurement.vt.edu/Vendor/WellsOne.html or contact me directly for more information.

By signing this agreement, both parties acknowledge and agree to incorporating the price increases attached to this renewal.

Sincerely,

Chad Dalton
Systems and Contracts Lead
(540) 231-9129

Smart Building Strategies LLC **agrees** to renew the contract under the terms and conditions of the subject contract.

Authorized Signature: Signed by: Vahid Kompany 3A8EE4C4675942D... Date: 8/29/2024

Name: Vahid Kompany (please print) Title: Director of Operations

We currently participate in the Wells One Program: _____

We would like to participate in the Wells One Program: _____

Approved: DocuSigned by: Reed Nagel 5EF51DA320D049B...
Director of Procurement

Date: 8/29/2024

2024 to 2026 Pricing from SBS

VASCUPP Term Contract - VTS 1851-2023	Current		3% Increase	Requested
Labor Category	**2022-23**	**2023-24**		**2024-2026**
Energy Engineer/Senior Commissioning Authority/Project Manager	$149.52	$149.52	$154.01	**$154.00**
Project Engineer/ Commissioning Authority	$124.28	$124.28	$128.01	**$128.00**
Field Engineer/ Commissioning Technician	$96.24	$96.24	$99.13	**$99.00**
Administrative Assistant	$65.28	$65.28	$67.24	**$67.00**

COMMONWEALTH OF VIRGINIA

STANDARD CONTRACT

Contract Number: VTS-1851-2023

This contract entered into this 30th day of August 2022 by Smart Building Strategies LLC hereinafter called the "Contractor" and Commonwealth of Virginia, Virginia Polytechnic Institute and State University called "Virginia Tech."

WITNESSETH that the Contractor and Virginia Tech, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide Commissioning and Audit Services to Virginia Tech as set forth in the Contract Documents.

PERIOD OF CONTRACT: From September 1, 2022 through August 31, 2024 with the option for three (3) two-year renewals.

COMPENSATION AND METHOD OF PAYMENT: The Contractor shall be paid by Virginia Tech in accordance with the Contract Documents.

CONTRACT DOCUMENTS: The Contract Documents shall consist of this signed contract, Request for Proposal (RFP) number 952642206 dated May 24, 2022, together with Addendum Number 1 To RFP dated June 10, 2022, the proposal submitted by the Contractor dated June 20, 2022 and the negotiation summary, all of which Contract Documents are incorporated herein.

ELECTRONIC TRANSACTIONS: If this paragraph is initialed by both parties, to the fullest extent permitted by Code of Virginia, Title 59.1, Chapter 42.1, the parties do hereby expressly authorize and consent to the use of electronic signatures as an additional method of signing and/or initialing this contract and agree electronic signatures (for example, the delivery of a PDF copy of the signature of either party via facsimile or electronic mail or signing electronically by utilizing an electronic signature service) are the same as manual executed handwritten signatures for the purposes of validity, enforceability and admissibility.

DS VK / DS RN
(Initials)

In WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

Contractor
By: DocuSigned by: Vahid Kompany 3A8EE4C4675942D...
(Sig)
Vahid Kompany
Name and Title
Director of Operations

Virginia Tech
By: DocuSigned by: Reed Nagel 5EF51DA320D049B...
Reed Nagel
Associate Director for Goods and Services

Request for Proposal # 952642206

For

Commissioning and Audit Services

5/24/2022

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

INCLUDE THIS PAGE WITH YOUR PROPOSAL, SIGNATURE AT SUBMISSION IS REQUIRED

DUE DATE: Proposals will be received until **June 24, 2022 at 3:00 PM**. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

INQUIRIES: All inquiries for information regarding this solicitation should be directed to Levi Henry, CUPO, Buyer Senior. Phone: (540) 231-7852 e-mail: lhenry29@vt.edu. All inquiries will be answered in the form of an addendum. Inquiries must be submitted by **3:00 PM on June 10, 2022**. Inquiries must be submitted to the procurement officer identified in this solicitation.

PROPOSAL SUBMISSION:
Proposals may NOT be hand delivered to the Procurement Office.

Virginia Tech has partnered with Bonfire Interactive to create a new procurement portal that will allow you to access business opportunities and submit bids and proposals to Virginia Tech digitally.

Proposals must be submitted electronically at:
https://procurement-vt.bonfirehub.com/.

Vendors are requested to visit the new Procurement Portal then follow the link to the Bonfire vendor registration page to register your company. Registration is easy and free. If you have any challenges with the registration process, please contact Bonfire Interactive Support at support@gobonfire.com .

It is encouraged for all vendors to register prior to the proposal submission deadline to avoid late submissions. Log into your Bonfire Vendor account in order to access the opportunity and begin preparing your submission. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time.

For a quick tutorial on how to upload a submittal, visit: https://support.gobonfire.com/hc/en-us/articles/360011034814-Creating-and-Uploading-a-Submission-for-Vendors-?_ga=2.42375717.1472165071.1588110542-997330893.1585332052

Hard copy or email proposals will not be accepted. Late proposals will not be accepted, nor will additional time be granted to any individual Vendor.

Attachments must be smaller than 1000MB in order to be received by the University.

In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods or services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

AUTHORIZED SIGNATURE: _____ Date: _____

03/28/2022

[INCLUDE THIS PAGE]

I. PURPOSE:

This Request for Proposal (RFP) seeks to solicit proposals to establish a contract for Commissioning and Audit Services through competitive negotiations by Virginia Polytechnic Institute and State University (Virginia Tech), an agency of the Commonwealth of Virginia.

Virginia Tech has a need to procure Mechanical/Electrical System, Building Envelope, Plumbing and Building Automation Control Commissioning Services and Energy and Water Audit Services on a continuous and regular basis for a wide variety of projects associated with campus renovations and new construction.

II. SMALL, WOMAN-OWNED AND MINORITY (SWAM) BUSINESS PARTICIPATION:

The mission of the Virginia Tech supplier opportunity program is to foster inclusion in the university supply chain and accelerate economic growth in our local communities through the engagement and empowerment of high quality and cost competitive small, minority-owned, women-owned, and local suppliers. Virginia Tech encourages prime suppliers, contractors, and service providers to facilitate the participation of small businesses, and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other inclusive and innovative relationships.

For more information, please visit: https://www.sbsd.virginia.gov/

III. CONTRACT PERIOD:

The term of this contract is for Two (2) year(s), or as negotiated. There will be an option for three (3) two-year renewals, or as negotiated.

IV. EVA BUSINESS-TO-GOVERNMENT ELECTRONIC PROCUREMENT SYSTEM:

The eVA Internet electronic procurement solution streamlines and automates government purchasing activities within the Commonwealth of Virginia. Virginia Tech, and other state agencies and institutions, have been directed by the Governor to maximize the use of this system in the procurement of goods and services. *We are, therefore, requesting that your firm register as a vendor within the eVA system.*

There are transaction fees involved with the use of eVA. These fees must be considered in the provision of quotes, bids and price proposals offered to Virginia Tech. Failure to register within the eVA system may result in the quote, bid or proposal from your firm being rejected and the award made to another vendor who is registered in the eVA system.

Registration in the eVA system is accomplished on-line. Your firm must provide the necessary information. Please visit the eVA website portal at http://www.eva.virginia.gov/pages/eva-registration-buyer-vendor.htm and **register both with eVA and Ariba**. *This process needs to be completed before Virginia Tech can issue your firm a Purchase Order or contract.* If your firm conducts business from multiple geographic locations, please register these locations in your initial registration.

For registration and technical assistance, reference the eVA website at: https://eva.virginia.gov/, or call 866-289-7367 or 804-371-2525.

V. CONTRACT PARTICIPATION:

It is the intent of this solicitation and resulting contract to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions, or Virginia Tech's affiliated corporations and/or partnerships may access any resulting contract if authorized by the contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor, the resultant contract may be extended to the entities indicated above to purchase at contract prices in accordance with contract terms. The Contractor shall notify Virginia Tech in writing of any such entities accessing the contract, if requested. No modification of this contract or execution of a separate contract is required to participate. The Contractor will provide semi-annual usage reports for all entities accessing the Contract, as requested. Participating entities shall place their own orders directly with the Contractor and shall fully and independently administer their use of the contract to include contractual disputes, invoicing and payments without direct administration from Virginia Tech. Virginia Tech shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that Virginia Tech is not responsible for the acts or omissions of any entity, and will not be considered in default of the contract no matter the circumstances.

Use of this contract does not preclude any participating entity from using other contracts or competitive processes as the need may be.

VI. STATEMENT OF NEEDS/SCOPE OF WORK: Potential services for new buildings and renovations may include, but not necessarily be limited to the following

A. Pre-Design Phase:

1. Assemble a Commissioning Team, hold a scoping meeting and identify responsibilities
2. Develop a draft design-phase Commissioning Plan
3. Attend Commissioning meetings as needed with project manager and design team
4. Review the Owner Objectives documentation (design intent) for clarity and completeness
5. Develop the "Owner Project Requirements" (OPR) in correlation to the A/E's "Basis of Design" (BOD) information from the University and Design Team

B. Design Phase:

1. Coordinate and supervise the Commissioning work during design.
2. Attend initial meetings with the University and Design Team to discuss role of Commissioning Services Contractor (CxA) and coordination of design
3. Prepare and distribute the design phase Commissioning Plan
4. Continual review and update of the OPR throughout the design phase

5. Check the specifications to ensure there are no conflicts in testing, balancing, or other procedures that will not allow for a full and complete test of each system.
6. Provide Design Team members with Commissioning items to be considered during design
7. Perform focused design reviews, including schematic, preliminary, and working documents
8. Provide a final back-check review of the final documents to confirm comments were incorporated. The design review shall include the following:
    a. Input regarding making the building more commissionable
    b. How building O&M can be made easier (accessibility and system control, etc.)
    c. How utility usage and Indoor Environmental Quality con be improved
    d. Review contract documents to facilitate project certification goals (i.e. does design meet Energy Star, etc.)
    e. Verify the design complies with University's design guidelines and standards
9. Verify that contract documents are in keeping with and will meet the OPR
10. Prepare Commissioning specifications for the construction bid documents for systems and equipment that are to be commissioned
11. Have the Commissioning specifications approved by the A/E team and include in the A/E construction specifications
12. Prepare sample draft functional tests for equipment and systems to include in specifications
13. Verify that contract documents provide adequate building O&M documentation and operator training
14. Attend two, on-day Design Team review meetings to discuss comments on plans and coordinate specifications. Meetings will be held on VT campus
15. Coordinate a controls integration meeting between the mechanical and electrical engineers and the controls vendor
16. Prepare and maintain issues log
17. Participate in Value Engineering (VE) session as required to ensure the intent of the OPR is not compromised

C. <u>Construction Phase:</u>

1. Conduct a partnering meeting with the University and Contractor Team to discuss Commissioning scope, plan and schedule
2. Coordinate the Commissioning work with the General contractor (GC) to ensure that Commissioning activities are being scheduled into the master schedule. Continue to update schedule and coordination throughout construction with GC and subcontractors
3. Submit final Commissioning Plan for construction with coordination and activities for University PM and GC review
4. Review normal contractor submittals applicable to systems being commissioned for compliance with Commissioning needs, concurrent with the A/E reviews
5. Ensure that O&M material and contractor start-up procedures are submitted to the CxA team as the contractor receives it. This material will be needed to assist in finalizing start-up testing procedures.
6. Prepare final pre-functional and final functional test procedures for the equipment and systems
7. Submit test procedures to contractor for comments on appropriate startup, operations, and systems safety
8. Perform site inspection as necessary during rough-in of systems and equipment
9. Review request for information and change orders for impact on commissioning and OPR

10. Maintain a master issues log of any items found to be a problem, poorly installed or discrepancies. The log must be sufficiently detailed so as to provide clarity and point of future reference for the comment
11. Attend up to 12 on-site meetings for review of progress, coordination, and issues resolution. More than 12 on-site meetings will be considered work outside the normal scope of work
12. Witness a pipe test and flushing procedure, sufficient to be confident that proper procedures were followed
13. Coordinate with the contractor to witness startup of major equipment
14. Review and approve TAB execution plan
15. Witness a sample of any ductwork testing and cleaning procedures, sufficient to be confident that proper procedures were followed
16. Witness a sample of checkout, TAB, end-to-end testing and calibration of controls
17. Observe first pre-functional test of each type of system, including mechanical, controls, electrical, and specialty systems

D. Acceptance Phase:

1. Continue to update schedule and coordination throughout construction with GC and subcontractors
2. Obtain pre-functional reports from Constructor with sign-offs that the systems have been checked out
3. Obtain TAB report from TAB contractor. Verify accuracy of the TAB effort. Direct the TAB contractor to take simple readings and compare to TAB report:
   a. 20% sample of V A V terminals, other small terminal unit equipment serving general public areas
   b. 100% of lab terminals and lab hood controls
   c. 100% of the TAB report readings for main AHU's, central plant equipment, main pumps, and main exhaust fans
   d. Document findings
4. Verify building controls:
   a. 20% point-to-point verification of terminal units servicing general public areas, including analog calibration, mapping to workstation graphics, proper control, and alarm management functions
   b. 100% point-to-point verification of controls in lap spaces, including analog calibration, mapping to workstation graphics, proper controls and alarm management functions
   c. 100% point-to-point verification of main AHU's, central plant equipment, main pumps, and main exhaust fans; including analog calibration, mapping workstation graphics, and alarms management functions
5. Witnessing functional testing of smoke controls systems, emergency power, transfer switch, and fire alarm/protection sequence of operation per NFPA and University requirements
6. Conduct acoustic/sound level testing and prepare report
7. Witness functional testing of each major piece of equipment to demonstrate that each item of equipment and system is operating according to the OPR and contract documents. Functional testing shall include operating the system and components through each of the written sequences of operations
8. Provide troubleshooting to assist in resolving control problems, as they are uncovered
9. Maintain a master issues log and separate record of test results of any items found to be a problem, poorly installed, or discrepancies. The log must be sufficiently detailed so as to provide clarity and point of future reference for the comment. Provide the log and test results to the University PM, A/E, and GC, with recommended actions

10. Coordinate retesting as necessary. One retest will be provided as part of normal checkout. More than one retest will be considered work outside the normal scope of work
11. Notify the University PM and GC of the unacceptable finding if 10% of identical pieces of equipment fail to perform to the requirements of the contract documents because of manufacturing defects which do not allow it to meet the submitted performance spec, request an explanation of the problem and proposed solution from the GC; and then review the proposed solutions
12. Attend weekly meetings while on-site for functional testing
13. Attend up to one additional on-site meeting for review of progress, coordination, and issues resolution. More than on on-site meeting will be considered work outside the normal scope of work
14. Review O&M documentation for completeness. This review shall be in parallel with the A/E's team review of the O&M documentation for conformance to the project specification
15. Provide the user staff with an on-day systems training on "how the building is supposed to operate"
16. Review, pre-approve, and coordinate training of the University operating personnel by the contractor
17. Perform deferred (season) testing checkout of equipment – in August for cooling systems and in January for heating systems
18. Provide three hard bound copies of the comprehensive System Concept and Operations Manual containing:
    a. Owner objectives
    b. Design narrative and basis of design
    c. System descriptions
    d. Sing-line diagrams
    e. Sequence of operations and setpoint tables
    f. Instruction for normal operation, and seasonal adjustments
    g. Start-up and shutdown
    h. Energy saving strategies and monitoring recommendations
19. Provide three hard bound copies and three CD-ROM electronic copies of the Commissioning management report (Commissioning Final Report). The report shall include an executive summary, list of participants and roles, brief building description, and the following sections:
    a. Design intent
    b. Basis of design
    c. Pre-functional checklists complete
    d. Functional checklists complete
    e. TAB Reports
    f. System schematics
    g. Control strategies and set points
    h. Deficiency log
20. Verify the completeness and accuracy of BIM equipment inventory provided by the Contractor.

E. <u>Warranty Phase:</u>

1. During seasonal testing and at 10 months into warranty, review with facility staff the current building operation and the condition of outstanding issues related to the original and seasonal Commissioning
2. Interview facility staff and identify problems or concerns they have with operating the building as originally intended

3. Identify deficiencies that may come under warranty or under the original construction contract
4. Identify if facility staff needs additional vendor system training. Provide recommendations on additional training to the University
5. Prepare a detailed evaluation on the status of warranty issues for the University PM

F. Re-commissioning, Retro-commissioning and Audit Services:

1. Provide re-commissioning, retro-commissioning, and/or Audit services on existing facilities/systems as requested.

G. Systems to Commission: The specific systems that may be commissioned include but are not necessarily limited to:

1. HVAC and Mechanical

a. Building automation systems, including laboratory controls and linkages to remote monitoring and control sites
b. Chiller, chilled water pumps, piping, and associated equipment
c. Boiler, heat exchangers, hot water pumps, piping, and associated equipment
d. Air handling units
e. Laboratory, clean room, fume hood and pressurization systems
f. Exhaust and other specialty fans
g. Terminal units
h. Ductwork and piping
i. Heat exchangers
j. Fire and smoke dampers
k. HVAC system noise control and sound level testing
l. Smoke control systems – interfaces, egress pressurization

2. Electrical Systems

a. Emergency power system – includes generator, transfer switches, controls, and interlocks
b. Inspection of sectionalizing switch installation and testing

3. Lighting Systems
a. Light Levels
b. Lighting control system components – including but not limited to occupancy sensors, timers, photocells, and daylight sensors

4. Plumbing Systems

5. Building envelope

H. Supplemental Instructions & Clarifications: The following are offered to generally clarify the Owner's expectations regarding services that the CxA may be required to perform depending on the individual Project Order scope of work. They are explanations offered for the benefit, information and assistance of the CxA

1. The Owner will usually provide to the CxA copies of pertinent drawings on file indicating new/existing buildings, utilities and conditions

2. The Owner will usually provide the CxA copies of any pertinent drawing available on an existing building, which may be the subject of a Project Order. The CxA must not rely totally on information contained in the "as-built" documents
3. The CxA's project related costs of all miscellaneous blueprinting, reproduction of reports, photocopying, long distance telephone calls, facsimile transmissions, telegrams, travel and postage are included in the lump sum fee and marked up hourly rates negotiated
4. Each Project Order shall describe the scope of work required of the CxA and show the agreed-upon fee for the work. If applicable, the Project Order or its attachment shall identify any special requirements for the project, and show any schedule milestones for performance of the work
5. If extra services are requested or approved by the Owner during the course of any Project Order Work, the CxA will be compensated on the basis of a fixed sum fee to be negotiated at the time the extra work is ordered or at the hourly rates agreed upon in the contract. Any hourly rate method as specified above may be used instead of a fixed fee at the Owner's discretion. The fees for any such extra work shall be included in any calculation of the total value of the Project Order and in the aggregate total of all Project Orders issued during the contract term
6. Any Project Order for a feasibility or other study or a schematic or preliminary design issued pursuant to this term contract shall not include the right to extend the CxA's scope of services to include full design and construction period services. The CxA shall not, however, be prohibited from participating in a competitive negotiation procurement for such services.

VII. PROPOSAL PREPARATION AND SUBMISSION:

A. Specific Requirements

Proposals should be as thorough and detailed as possible so that Virginia Tech may properly evaluate your capabilities to provide the required goods or services. Offerors are required to submit the following information/items as a complete proposal:

1. Qualifications and Experience:

   Provide Organization data, including size and structure of the company, locations of branch offices and/or subcontractor arrangements, if any. Describe the company's qualifications and experience in providing the services described herein. Provide a list of the management and staff personnel (include energy engineers and water efficiency engineers), designated by discipline, and described their qualifications; resumes will suffice. Include proof of required certifications and/or licenses. Provide evidence of financial stability and your ability to obtain bonding.

2. References:

   Provide four (4) recent references, either educational or governmental, for whom you have provided the type of services described herein. Include the date(s) the services were furnished, the client name, address and the name and phone number of the individual Virginia Tech has your permission to contact.

3. Price:

   Provide a price schedule for all services offered. Discuss price firmness and include a plan for conveying price changes during renewal period of any resulting contract.

4. Plan for Providing Services:

   Describe your plan for providing the services described in the RFP.

5. Participation of Small, Women-owned and Minority-owned Business (SWAM) Business:

   If your business cannot be classified as SWaM, describe your plan for utilizing SWaM subcontractors if awarded a contract. Describe your ability to provide reporting on SWaM subcontracting spend when requested. If your firm or any business that you plan to subcontract with can be classified as SWaM, but has not been certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), it is expected that the certification process will be initiated no later than the time of the award. If your firm is currently certified, you agree to maintain your certification for the life of the contract. For assistance with SWaM certification, visit the SBSD website at http://www.sbsd.virginia.gov/

6. The return of the General Information Form and addenda, if any, signed and filled out as required.

D. General Requirements

1. RFP Response: In order to be considered for selection, Offerors shall submit a complete response to this RFP to include;

   a. **One (1) electronic document** in WORD format or searchable PDF of the entire proposal as one document, INCLUDING ALL ATTACHMENTS must be uploaded through the Bonfire online submission portal. Refer to page 2 for instructions.

      Any proprietary information should be clearly marked in accordance with 2.d. below.

   b. Should the proposal contain **proprietary information**, provide **one (1) redacted electronic copy** of the proposal and attachments **with proprietary portions removed or blacked out**. This redacted copy should follow the same upload procedures as described on Page 1 of this RFP. This redacted copy should be clearly marked *"Redacted Copy"* within the name of the document. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable. Virginia Tech shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

      No other distribution of the proposals shall be made by the Offeror.

2. Proposal Preparation:

   a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in Virginia Tech requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by Virginia Tech at its discretion. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

b. 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.

c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, subletter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and subletter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

d. Ownership of all data, material and documentation originated and prepared for Virginia Tech pursuant to the RFP shall belong exclusively to Virginia Tech and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act. However, to prevent disclosure the Offeror must invoke the protections of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data or other materials is submitted. The written request must specifically identify the data or other materials to be protected and state the reasons why protection is necessary. –The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and may result in rejection of the proposal.

3. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to Virginia Tech.—This will provide an opportunity for the Offeror to clarify or elaborate on the proposal but will in no way change the original proposal. Virginia Tech will schedule the time and location of these presentations. Oral presentations are an option of Virginia Tech and may not be conducted. Therefore, proposals should be complete.

VIII. SELECTION CRITERIA AND AWARD:

A. Selection Criteria

Proposals will be evaluated by Virginia Tech using the following:

Criteria	Maximum Point Value
1. Quality of products/services offered and suitability for the intended purposes	20
2. Qualifications and experiences of Offeror in providing the goods/services	25
3. Specific plans or methodology to be used to provide the Services	20
4. Cost (or Price)	25
5. Participation of Small, Women-Owned and Minority (SWAM) Business	10
Total	100

B. Award

Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for Proposal. Negotiations shall then be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Virginia Tech shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. Virginia Tech may cancel this Request for Proposal or reject proposals at any time prior to an award. Should Virginia Tech determine in writing and in its sole discretion that only one offeror has made the best proposal, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of this solicitation and the Contractor's proposal as negotiated.

Virginia Tech reserves the right to award multiple contracts as a result of this solicitation.

IX. INVOICES:

Invoices for goods or services provided under any contract resulting from this solicitation shall be submitted by email to vtinvoices@vt.edu or by mail to:

Virginia Polytechnic Institute and State University (Virginia Tech)
Accounts Payable
North End Center, Suite 3300
300 Turner Street NW
Blacksburg, Virginia 24061

X. METHOD OF PAYMENT:

Virginia Tech will authorize payment to the contractor as negotiated in any resulting contract from the aforementioned Request for Proposal.

Payment can be expedited through the use of the Wells One AP Control Payment System. Virginia Tech strongly encourages participation in this program. For more information on this program please refer to Virginia Tech's Procurement website: http://www.procurement.vt.edu/vendor/wellsone.html or contact the procurement officer identified in the RFP.

XI. ADDENDUM:

Any **ADDENDUM** issued for this solicitation may be accessed at http://www.apps.vpfin.vt.edu/html.docs/bids.php. Since a paper copy of the addendum will not be mailed to you, we encourage you to check the web site regularly.

XII. COMMUNICATIONS:

Communications regarding this solicitation shall be formal from the date of issue, until either a Contractor has been selected or the Procurement Department rejects all proposals. Formal communications will be directed to the procurement officer listed on this solicitation. Informal communications, including but not limited to request for information, comments or speculations regarding this solicitation to any University employee other than a Procurement Department representative may result in the offending Offeror's proposal being rejected.

XIII. CONTROLLING VERSION OF SOLICITATION:

The posted version of the solicitation and any addenda issued by Virginia Tech Procurement Services is the mandatory controlling version of the document. Any modification of/or additions to the solicitation by the Offeror shall not modify the official version of the solicitation issued by Virginia Tech Procurement Services. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, Virginia Tech reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.

XIV. TERMS AND CONDITIONS:

This solicitation and any resulting contract/purchase order shall be governed by the attached terms and conditions, see Attachment A.

XV. CONTRACT ADMINISTRATION:

A. The contract administrator will be determined at a later time. The Contract Administrator shall use all powers under the contract to enforce its faithful performance.

B. The Contract Administrator, or their designee, shall determine the amount, quantity, acceptability, fitness of all aspects of the services and shall decide all other questions in connection with the services. The Contract Administrator, or their designee, shall not have authority to approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Virginia Tech Procurement Department through a written amendment to the contract.

XVI. ATTACHMENTS:

Attachment A - Terms and Conditions

ATTACHMENT A

TERMS AND CONDITIONS

RFP GENERAL TERMS AND CONDITIONS

See:
https://www.procurement.vt.edu/content/dam/procurement_vt_edu/docs/terms/GTC_RFP_02182022.pdf

ADDITIONAL TERMS AND CONDITIONS

1. **ADDITIONAL GOODS AND SERVICES**: The University may acquire other goods or services that the supplier provides other than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services newly introduced during the term of the Agreement.

2. **AUDIT**: The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. Virginia Tech, its authorized agents, and/or the State auditors shall have full access and the right to examine any of said materials during said period.

3. **AVAILABILITY OF FUNDS**: It is understood and agreed between the parties herein that Virginia Tech shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.

4. **CANCELLATION OF CONTRACT**: Virginia Tech reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

5. **CONTRACT DOCUMENTS**: The contract entered into by the parties shall consist of the Request for Proposal including all modifications thereof, the proposal submitted by the Contractor, the written results of negotiations, the Commonwealth Standard Contract Form, all of which shall be referred to collectively as the Contract Documents.

6. **IDENTIFICATION OF PROPOSAL EMAIL**: Virginia Tech will only be accepting electronic submission of proposals. All submissions must be submitted to https://procurement-vt.bonfirehub.com/. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time. **Attachments must be smaller than 1000MB in order to be received by the University.** Proposals may **NOT** be hand delivered to the Procurement Office.

7. **NOTICES**: Any notices to be given by either party to the other pursuant to any contract resulting from this solicitation shall be in writing via email.

8. **SEVERAL LIABILITY:** Virginia Tech will be severally liable to the extent of its purchases made against any contract resulting from this solicitation. Applicable entities described herein will be severally liable to the extent of their purchases made against any contract resulting from this solicitation.

9. **CLOUD OR WEB HOSTED SOFTWARE SOLUTIONS**: For agreements involving Cloud-based Web-hosted software/applications refer to link for additional terms and conditions: http://www.ita.vt.edu/purchasing/VT_Cloud_Data_Protection_Addendum_final03102017.pdf

SPECIAL TERMS AND CONDITIONS

ADVERTISING: In the event a contract is awarded for supplies, equipment, or services resulting from this solicitation, no indication of such sales or services to Virginia Tech will be used in product literature or advertising. The contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.

INSURANCE:

By signing and submitting a Proposal/Bid under this solicitation, the offeror/bidder certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.
During the period of the contract, Virginia Tech reserves the right to require the contractor to furnish certificates of insurance for the coverage required.
INSURANCE COVERAGES AND LIMITS REQUIRED:

A. Worker's Compensation - Statutory requirements and benefits.
B. Employers Liability - $100,000.00
C. General Liability - $1,000,000.00 combined single limit. Virginia Tech and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.
D. Automobile Liability - $500,000.00
E. Builders Risk – For all renovation and new construction projects under $100,000 Virginia Tech will provide All Risk – Builders Risk Insurance. For all renovation contracts, and new construction from $100,000 up to $500,000 the contractor will be required to provide All Risk – Builders Risk Insurance in the amount of the contract and name Virginia Tech as additional insured. All insurance verifications of insurance will be through a valid insurance certificate.

F. The contractor agrees to be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, including but not limited to claims under the Worker's Compensation Act. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.

SIDEWALK POLICY: Driving on sidewalks is allowed when there is no other way to get a needed vehicle to a designated place or building on campus. The vehicle operator shall be made aware that extreme caution shall be used to operate the vehicle in a way that will not be a hazard or hindrance to pedestrians using the walk. The contractor shall be responsible for any damage to turf and anything that is located adjacent to the walk. Parking an unattended vehicle on a sidewalk is strictly prohibited by State Law. The contractor is allowed to park a vehicle on a sidewalk if there is no other way to perform necessary work. The procedure to obtain a permit to operate a vehicle on sidewalks is the

same as for the turf as outlined in Turf Policy. Any vehicle parked illegally on sidewalks shall be subject to ticketing, fines and towing if necessary.

SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of Virginia Tech. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish Virginia Tech the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by his subcontractor(s) and shall assure compliance with all requirements of the contract.

TURF POLICY: Parking or driving on campus turf or sidewalk is strictly prohibited, except as specifically directed or otherwise allowed by the Physical Plant Grounds Department. In this case, a turf permit must be obtained from Virginia Tech Parking Services and displayed by the vehicle. Turf parking is not allowed under the canopy of any tree on campus. Any vehicle parked illegally on turf or sidewalks shall be subject to ticketing and fines.

WARRANTY (COMMERCIAL): The contractor agrees that the supplies or services furnished under any award resulting from this solicitation shall be covered by the most favorable commercial warranties the contractor gives any customer for such supplies or services and that the rights and remedies provided therein are in addition to and do not limit those available to Virginia Tech by any other clause of this solicitation. A copy of this warranty must be furnished with the Proposal/Bid.

WORK SITE DAMAGES: Any damage to existing utilities, equipment or finished surfaces resulting from the performance of this contract shall be repaired to the Owner's satisfaction at the contractor's expense.

ADDENDUM # 1 TO RFP # 952642206

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY (Virginia Tech)
Procurement Department (MC 0333)
North End Center, Suite 2100
300 Turner Street NW
Blacksburg, Virginia 24061

DATE	ORIGINAL DUE DATE AND HOUR
June 10, 2022	**June 24, 2022 @ 3:00 PM**

ADDRESS ALL INQUIRIES AND CORRESPONDENCE TO: Levi Henry, Buyer Senior
E-MAIL ADDRESS: lhenry29@vt.edu TELEPHONE NUMBER (540) 231-7852
FAX NUMBER (540) 231-9628 AFTER HOUR MESSAGES (540) 231-6221

Commissioning and Audit Services

A. The following questions have arisen as a result of this solicitation. Please see answers below in red:

1. The RFP doesn't mention LEED. Does VT typically pursue LEED, and if so, for new construction, would Option 1 Path 2 Monitoring Based Commissioning be pursued? VT does typically pursue LEED Silver on new capital projects. The Option 1 Path 2 Monitoring Based Commissioning may be an option to be pursued.

2. Is there a set number of contracts that will be awarded for this RFP? No, there is no set number of contracts that will be awarded.

3. Will all of VT's commissioning needs, be fulfilled through this contract? Or do you anticipate procuring commissioning services under separate contract as well (say major new construction)? Virginia Tech cannot guarantee any minimum amount of business for any contract(s) awarded from this RFP.

4. Is this for all or VT's campuses? If so, would VT accept applications from commissioning providers that would prefer to focus on one campus location, rather than all, in order to limit the impact of travel costs to projects? The intent for this RFP is to service all of Virginia Tech's needs, wherever that may be.

5. Can a firm submit as prime and be a sub-consultant on other teams as well? Yes.

6. If the prime is SWaM/MBE, does that qualify to achieve 100% of the credit for SWaM participation, or does the SWaM commissioning provider need to bring another SWAM/MBE onboard? If the primary contractor is SWaM certified by the Virginia SBSD then that qualifies for 100% of the credit.

7. Under section VII, A. 3- Price: Are you looking for a rates sheet of team members, or should we price a hypothetical project to show the level of effort on different tasks? We are looking for an hourly rate sheet for team members.

8. Does Virginia Tech utilize any monitoring-based commissioning data analytics software such as Skyspark or Clockworks? Currently we have a system available called Navigator by Siemens. However, it is not fully utilized at this time.

9. Can you please tell me where I can find the required General Information Form to include with our submission to RFP #952642206 (Commissioning and Audit Services)? Page 2 of the RFP is considered the general information form. Please sign the bottom of this page and include as part of your proposal.

10. May our firm be part of multiple teams submitting on this RFP solely for the Building Enclosure Commissioning Services component of the RFP? Yes, your firm can be part of multiple teams submitting on this RFP solely for the Building Enclosure Commissioning Services component.

11. For the Insurance section, the RFP says: *Builders Risk – For all renovation and new construction projects under $100,000 Virginia Tech will provide All Risk – Builders Risk Insurance. For all renovation contracts, and new construction from $100,000 up to $500,000 the contractor will be required to provide All Risk – Builders Risk Insurance in the amount of the contract and name Virginia Tech as additional insured. All insurance verifications of insurance will be through a valid insurance certificate.* We have never seen this requirement before for a commissioning RFP. We are not contractors or builders. Can you confirm that this is being required for Cx Providers to add to their insurance policies? Yes, this term and condition will be included in any resulting contract(s) awarded from this solicitation.

12. Do you anticipate using this contract for work on the new Arlington campus construction? The contract(s) will be intended to service any of Virginia Tech's related needs. It is possible that this will be used for the work on the new Arlington campus however Virginia Tech cannot guarantee any minimum amount of business for any contract(s) awarded from this RFP.

13. Bonding is not typically a requirement for commissioning contracts. Please confirm bonding will not be required. Bonding is not required as this is being solicited as an RFP for goods/services.

14. Please clarify the appropriate time for an offeror to propose alternate terms for General and Special Terms and Conditions - as part of the submitted proposal or during contract negotiations? Please include any alternate terms your firm proposes as part of your submission.

15. The commercial warranty requirement appears to be inappropriate for the professional services sought by the RFP. Please confirm providing the warranty will not be a requirement. This term and condition will be included in any resulting contract(s) awarded from this solicitation.

B. All other terms, conditions and descriptions remain the same.

C. The due date and hour remains at 3:00 PM on June 24, 2022.

I acknowledge that I have read and understand this addendum in its entirety.

_____ _____

Signature Date

Smart Building Strategies LLC
Commissioning Services Tailored to Your Needs

Proposal

Commissioning and Audit Services
RFP 952642206

Virginia Polytechnic Institute and State University

Submitted to:
Mr. Levi Henry, CUPO
Procurement Department
North End Center, Suite 2100
300 Turner Street NW, Blacksburg, VA 24061
(540)-231-7852
lhenry29@vt.edu

Proposal Due Date:
Jun 24th, 2022 at 3:00 PM

Prepared by:
Smart Building Strategies LLC
Ashburn, Virginia
(571) 455-7271
info@smartbuildingstrategies.com
www.smartbuildingstrategies.com

TABLE OF CONTENT

Smart Building Strategies LLC
(571) 455-7271
info@smartbuildingstrategies.com
www.smartbuildingstrategies.com

Date: June 20, 2022

To: Mr. Levi Henry, CUPO
Procurement Department
North End Center, Suite 2100
300 Turner Street NW, Blacksburg, VA 24061
Phone: (540)-231-7852
lhenry29@vt.edu

RE: **Commissioning and Audit Services**
Virginia Polytechnic Institute and State University
RFP 952642206

Dear Mr. Henry,

Smart Building Strategies LLC (SBS) is pleased to present its proposal to Virginia Polytechnic Institute and State University (Virginia Tech) for providing Commissioning and Audit Services in response to the above referenced RFP.

Headquartered in Ashburn, Virginia; SBS is a SWaM Certified small business with the Virginia Department of Small Business & Supplier Diversity (SBSD). We specialize in Building Commissioning and Energy Management services. Our professional and certified personnel have been providing facility commissioning and energy services for more than 15 years, helping clients improve operating efficiency and performance of their buildings systems.

Per the RFP requirement, enclosed we have provided information relative to our team's ability to serve the Virginia Tech for their commissioning and Energy Audit services needs under resulting contract. This proposal comprises of an "Executive Summary", after the Signature From, and Six (6) main sections. Sections 1 through 5 correspond with "Selection Criteria" 1 through 5, outlined in RFP Paragraph "A" of Section "VIII-SELECTION CRITERIA AND AWARD ". Section 6 contains appendices.

Should you have any questions regarding this submission, please contact our office at (571) 455-7271 or by email to vkompany@sbsmailbox.com.We stand ready to work with Virginia Tech towards achieving their commissioning and energy saving goals.

Sincerely,

Smart Building Strategies LLC

Vahid Kompany, PE, CxA, EMP, LEED AP BD+C
Director of Operations

RFP # 952642206, Commissioning and Audit Services

INCLUDE THIS PAGE WITH YOUR PROPOSAL, SIGNATURE AT SUBMISSION IS REQUIRED

DUE DATE: Proposals will be received until **June 24, 2022 at 3:00 PM**. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

INQUIRIES: All inquiries for information regarding this solicitation should be directed to Levi Henry, CUPO, Buyer Senior. Phone: (540) 231-7852 e-mail: lhenry29@vt.edu. All inquiries will be answered in the form of an addendum. Inquiries must be submitted by **3:00 PM on June 10, 2022**. Inquiries must be submitted to the procurement officer identified in this solicitation.

PROPOSAL SUBMISSION:
Proposals may NOT be hand delivered to the Procurement Office.

Virginia Tech has partnered with Bonfire Interactive to create a new procurement portal that will allow you to access business opportunities and submit bids and proposals to Virginia Tech digitally.

Proposals must be submitted electronically at:
https://procurement-vt.bonfirehub.com/.

Vendors are requested to visit the new Procurement Portal then follow the link to the Bonfire vendor registration page to register your company. Registration is easy and free. If you have any challenges with the registration process, please contact Bonfire Interactive Support at support@gobonfire.com .

It is encouraged for all vendors to register prior to the proposal submission deadline to avoid late submissions. Log into your Bonfire Vendor account in order to access the opportunity and begin preparing your submission. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time.

For a quick tutorial on how to upload a submittal, visit: https://support.gobonfire.com/hc/en-us/articles/360011034814-Creating-and-Uploading-a-Submission-for-Vendors-?_ga=2.42375717.1472165071.1588110542-997330893.1585332052

Hard copy or email proposals will not be accepted. Late proposals will not be accepted, nor will additional time be granted to any individual Vendor.

Attachments must be smaller than 1000MB in order to be received by the University.

In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods or services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

AUTHORIZED SIGNATURE: _____ Date: 6/17/2022

03/28/2022

[INCLUDE THIS PAGE]

ADDENDUM # 1 TO RFP # 952642206

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY (Virginia Tech)
Procurement Department (MC 0333)
North End Center, Suite 2100
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B. All other terms, conditions and descriptions remain the same.

C. The due date and hour remains at 3:00 PM on June 24, 2022.

I acknowledge that I have read and understand this addendum in its entirety.

Signature 6/17/2022 Date

II. EXECUTIVE SUMMARY

Smart Building Strategies LLC (SBS) is a SWaM Certified Small Business (Certification Number: 724677), headquartered in Ashburn, Virginia. We partner with building owners to ensure their facility is constructed per their requirements and the design intent, and provide them with recommendations for optimizing their facilities energy performance and indoor air quality. Founded in 2015, SBS mission is to provide comprehensive commissioning and energy management services to our clients, a turn-key solution package that assists maintaining their facility with lower cost and less energy consumption, while focusing on client satisfaction as our priority. We have built a reputation of remarkable teamwork and leadership in completion of multi-disciplined tasks. In summary, below we have outlined the services and solution packages we offer to our clients:

- *Commissioning Services*:
  - New construction & major renovation commissioning
  - Retro-commissioning
  - Re-commissioning
  - Continuous & monitoring based commissioning
- *Energy Management Services*
  - Energy audit
  - Energy planning & strategies
  - Energy consulting
  - Energy program support
- [redacted]

SBS is a member of the US Green Building Council (USGBC), AABC Commissioning Group (ACG), and Energy Management Association (EMA). With years of experience and full knowledge of industry needs, we provide building owners assistance and guidance necessary to achieve their energy planning, commissioning, and U.S. Green Building Council (USGBC) LEED related objectives. Our team has a thorough understanding of all aspects of commissioning, starting from the initial project design development to the construction phase systems pre-functional and functional performance testing to post-occupancy operations verifications, as well as all USGBC LEED commissioning requirements for projects seeking Certification (LEED Fundamental and Enhanced Commissioning).

Our Lead Commissioning experts and project managers are Licensed Professional Engineers (PE), certified ACG Commissioning Authorities (CxA) and LEED Accredited Professionals (LEED AP) by USGBC. With years of experience in building system design, our experts bring their extensive and diverse experience to every project and implement new and innovative ways to execute each program efficiently and cost effectively.

Over the past 5 years we have been able to establish several Term Contracts for providing commissioning, retro-commissioning, and energy audit services with agencies, counties, and other public bodies in the Commonwealth of Virginia, including the followings:

- ***Virginia Association of State College and University Purchasing Professionals (VASCUPP), Virginia:*** We are pleased to be the incumbent contractor and have been awarded this VASCUPP term contract by the Virginia Polytechnic Institute & State University for providing commissioning and energy audit; during the previous term in October 2017 (Contract# VTS-725-2018) and since

then we have been able to assist Virginia Tech with their commissioning services needs on several projects.

- ***Chesterfield County and Chesterfield County Public Schools, Virginia*:** In October 2019 SBS was awarded a Term contract for 1 Base Year with 4 additional 1-Year renewal options (5-Year overall Term Contract) by the County of Chesterfield, Virginia and Chesterfield County Public Schools, a school division within Chesterfield County, Virginia; for commissioning and retro-commissioning services.

- ***Arlington County, Virginia:*** On May 3rd, 2021; SBS was awarded a Term Contract for 1 Base Year with 4 additional 1-Year renewal options (5-Year overall Term Contract) by the County of Arlington, Virginia; for commissioning and retro-commissioning services.

- ***Commonwealth of Virginia, Department of General Services:*** On June 16th, 2021; SBS received the "Notice of Award" of a Term Contract, starting July 1st, 2021; for 1 base year and 4 additional 1-year renewal options, by the Department of General Services of Commonwealth of Virginia, for providing commissioning services at Central region, Northern Region, Tidewater Region, Western Region, and Southwestern Region.

We have an excellent record of being responsive to our client's needs. Our clients have enlisted SBS because of our reputation for quality services, our understanding of technical issues, and our ability to communicate concisely, accurately, and effectively. They have continuously returned to us because of our history of consistent high-quality engineering services, on-time, and within-cost performance. What has set us apart in our industry and helped us to be recognized by our clients in the Commonwealth of Virginia is as follows:

- We are committed to develop a partnering relationship with our clients to establish a common mindset in order to achieve their facilities commissioning & energy saving goals.
- As a Virginia based Small Business, we have a team of local certified commissioning authorities and resources necessary to successfully provide commissioning services in the Commonwealth of Virginia and support to short notice project needs on multiple tasks simultaneously.
- We have extensive experience in providing commissioning services to the Commonwealth of Virginia agencies, counties, and other public bodies, including Virginia Tech.
- Our Key personnel are Certified Commissioning Authorities and Licensed Professional Engineers with in-depth knowledge of commissioning process and extensive experience in energy-efficient equipment design and control strategy optimization.
- We provide our reliable services with maximum flexibility in budget and schedule.
- We maintain continuous open dialog with our clients to ensure they consider us as their partner not their vendor.
- Clients' satisfaction has always been cornerstone of our business practices and we strive to maintain and improve our high standards by continuously asking and adopting our clients' feedback.
- And the most important thing, our clients' projects success are our top priority and our success.

On the following pages we have outlined, in the chronological order of which is required in the RFP, our ability to perform commissioning and audit services for Virginia Tech and how we can integrate our expertise into the Virginia Tech Commissioning and Energy Management department knowledge and effort in order to meet their facility and energy management objectives.

Following Sections 1 through 5 correspond with "Selection Criteria" 1 through 5, outlined in RFP Paragraph "A" of Section "VIII-SELECTION CRITERIA AND AWARD ". Section 6 includes appendices.

SECTION 1. QUALITY OF SERVICES

This section refers to item 1 of Selection Criteria, "*Quality of products/services offered and suitability for the intended purposes*" as it is required in the section *VIII-SELECTION CRITERIA AND AWARD* of the RFP.

The word "**Quality"** refers to the standard of something as measured against other things of a similar kind and defines the degree of excellence. At Smart Building Strategies LLC (SBS) the Quality of service is referred to our ability to achieve complete client's satisfaction by meeting their objectives while proactively working with the project team delivering the project on budget and on time. Information presented below explains why we are confident that our commissioning services are delivered with the highest quality and standard and how SBS solution package are suitable for meeting Virginia Tech Commissioning and Energy Audit Services needs and objectives.

1.A. Project Delivery Fundamental

At SBS, we successfully execute multiple commissioning services programs and its related processes, utilizing our team's expertise, proper planning and process management, aiming for client's satisfaction and project success. We achieve this by applying four (4) fundamental factors for each program:

1.A.1. Technical Capability and Operational Excellence

We execute our programs by assigning experienced and qualified personnel who not only have the very knowledge needed to complete their given tasks but also have cultured the perfected approach with many years of experience in the field and industry. And the next step is to combine this knowledge and experience with the right operational methodology, where the technical capability and operational excellence meet each other to achieve the final goal, "The project Success".

1.A.2. Document Management

Document management is an important and integral part of the commissioning process. Proper documentation and deficiencies tracking are essential to the success of a commissioning project. We utilize facility commissioning software as well as a secure cloud base document sharing platform, where all team members can simultaneously and collaboratively access project documents, commissioning forms and test scripts, and deficiencies log, as well as commissioning activities status and progress of at any time.

1.A.3. Strategic Alliances

SBS, as a small business, has the team of experts who have the knowledge of today's emerging building energy technologies and how they need to interact to optimize performance and operational efficiency. Our experts have proven record of being able to successfully manage various ongoing and diversely located projects simultaneously nationwide. They have accomplished this by proper management, efficient communication, effective task planning and execution, and responsive schedule controls. However, in order expand our capacity; SBS has assembled a strategic alliance of local team of experts with presence in the region and diverse experience in the industry, to support us, when needed with our task orders.

1.A.4. Process Improvement

As stated earlier, clients' satisfaction has always been cornerstone of our business practices and we strive to maintain and improve our high standards by continuously asking and adopting our clients' feedback. At each project closeout, we will request the Owner representative/project manager to complete our standard "Performance Evaluation" form and provide us with feedback on the quality of service and our capability to carry out the commissioning activities in order to achieve the project objectives with the highest quality expected.

1.B. Effectiveness and Project Success

At SBS we believe that is crucial to have experienced commissioning experts and energy engineers, leading and supervising commissioning and energy audit task orders. On ALL task orders, the key individuals who perform the site activities and testing will be Certified Commissioning experts that are led and supervised by a licensed Professional Engineer PE who is also Certified Commissioning Authority. Our team key personnel have worked with many different clients over the past few years and each can attest to effectiveness of our delivery of services and the level of professionalism and the quality of services which resulted in their project success.

In order to illustrate the value that our team has brought to table and to quantify the level of expertise of our commissioning engineers, below we have presented examples of issue identified during the design and construction phase as well as energy saving measures recommended by our team:

1.B.1. Identifying Critical issues During the Design Phase

When our commissioning experts review the design documents, during the project design development phase, in addition to evaluating the document from the commissioning perspective, they also look at the overall feasibility and constructability of the final documents. Our goal is to evaluate design document ensuring that future operation issues are prevented and facility operation meets owners' goals and requirement. We work closely with the design team and owners' representative throughout the design phase to confirm all issues and discrepancies identified during our design reviews are addressed on the final construction documents. Examples of our design review comments during the process are related to:

- Missing details
- Accessibility to include dampers, valves and equipment for maintenance
- Branch duct volume dampers location
- Missing system components (System bypasses, Balancing Valves, Shutoff Valves, Check Valves, Isolation Valves, Drain Connections, etc.)
- Piping schematics/details in reference to proper cleaning and flushing process
- Supplemental heating requirements throughout the project
- Controls and sequence of operation

1.B.2. Identifying Critical Issues during the Construction Phase

During the construction phase our team starts the site activities at early stages. Our goal is to identify installations issue early on during the process so that project delays and costly installation modifications are avoided. We document and develop our commissioning issues log starting from the first site visit during the construction and it is updated by project team dynamically. Issues are recorded in our commissioning software that is accessible to the project team, allowing effective collaboration to address identified issues. To emphasis on importance of effective commissioning delivered by our key personnel, following examples describes how installation deficiencies could have impacted future building operations and caused facility maintenance complications and issues:

- Example 1: SBS performed as the commissioning specialist on a NAVFAC project in Maryland, hired post design and prior to the construction phase. The project included major renovation a two-story office and laboratory configuration. The existing HVAC system was replaced in its entirety with an efficient, reliable HVAC system. After review of construction documents SBS identified several gray areas in design, requiring clarification for construction, related to HVAC system. Identifying possible design issues prior to commencement of construction assists the project avoiding possible installation modification towards project close out, delays, and additional cost. Also during the site visits and regular installation verification process of HVAC system, our commissioning agents identified that bypass assembly for both hot water and chilled water coils, on all fan coil units are missing and are not installed by the contractor. This item was immediately

reported to the project team and the owner as part of our deficiencies log, awaiting further directions from the owner. This item, if not identified and not properly addressed could cause long term and serious maintenance issues after the building is in use and operation.

- Example 2: This example is related to LEED Fundamental and Enhanced commissioning of new construction of a federal facility. During the site visits at pre-functional process and performing installation checks of commissioned systems, our key personnel identified that many fire dampers were missing at toilet exhaust duct penetrations through the chase on the last floor and dielectric unions were not installed in fan coil units piping assemblies. By early identification of above critical issues, project team was able to implement measures in order to mitigate future serious safety issues and costly facility maintenance problems.

- Example 3: SBS is currently performing as the commissioning authority on the Virginia Tech Data and Decision Sciences Building. The new 5 story and approximately 120,000 square feet facility includes administrative, educational, and support spaces associated with faculty and graduate-level research. The building also provides numerous classroom types with intense computing power and state-of-the-art data processing and visualization. During the commissioning site visits, in December 2021, our team identified inconsistencies in coil section installation relative to their orientation/arrangement and hot water inlet and outlet piping of terminal boxes on the first floor. This item was identified when installation of terminal boxes was in progress on the first and second floor. With the team's efforts and several communications with the manufacture and coordination with the design team, it was confirmed that piping are required to be changed at many boxes, due to improper installation and piping arrangements. By identifying this critical issue, the project team was able to modify the incorrect installed terminal boxes at early stage and avoid wrong coil piping arrangement during the installations in upper floors. In addition this prevented future operations and maintenance problems in the building.

1.B.3. Facility Operation Optimization

Our team has a thorough understanding of all aspects of energy audit and retro-commissioning process. Our key personnel have performed retro-commissioning and energy audit services on millions of square footage, and over 150 buildings at VA Medical Centers, Nationwide. During August 2017 through August 2018 SBS performed energy audit services at four (4) out of Seven (7) VA Medical Facilities located in the VA Veterans Health Care Network, also known as Veterans Integrated Service Network (VISN) 5, under the awarded contract by U.S. Department of Veterans Affairs to our teaming partner. Below is the list of facilities completed in 2016 and energy saving measures identified by our key personnel in these facilities:

Facility Description	**Approximate SqFt.**	**No. of Building**
Site 1 - Washington DC VA Medical Center	988,653 SqFt	6
Site 2 - Baltimore MD VA Medical Center	735,269 SqFt	1
Site 3 - Martinsburg WV VA Medical Center	1,327,000 SqFt	60
Site 4 - Huntington WV VA Medical Center	713,170 SqFt	28

At the completion of this task, SBS prepared and submitted an audit report that concluded from our site visits activities and investigations at each medical center. The report included the following information, as the main objectives:

- Facility's Energy consumption and intensity over the last three years
- Energy, water, and GHG baseline year consumption and comparisons to federal Energy Independence and Security Act (EISA) and Executive Orders
- Identified Energy Conservation Measures (ECMs) and associated Cost & Saving analysis.

As the result of our assessment and the energy audit efforts in this project each facility could benefit from:

- **Washington DC VAMC:** Approximately 17,848 mmBtu annual energy savings, 1,702 (Metric Ton) GHG Reduction; with estimated amount of $447,696 annual cost saving. The amount of energy saving, by implementing the identified ECM, will result in 17.45 kBtu/Sq.Ft reductions in energy use intensity which is equal to a total of 8.3% EUI reduction.
- **Baltimore MD VAMC:** Approximately 8,924 MMBtu annual energy savings and 845 (Metric Ton) GHG Reduction with estimated amount of $185,239 annual cost saving. Implementing the identified ECM would result in reductions in energy use intensity, equal to a total of 6.42% EUI reduction.
- **Martinsburg WV VAMC:** Approximately 11,025 MMBtu annual energy savings and 900 (Metric Ton) GHG Reduction, with estimated amount of $195,922 annual cost saving. Implementing the identified ECM would result in reductions in energy use intensity, equal to a total of 4.9% EUI reduction.
- **Huntington WV VAMC:** Approximately 5,729 MMBtu annual energy savings and 532 (Metric Ton) GHG Reduction; with estimated amount of $108,530 annual cost saving. Implementing the identified ECM would result in reductions in energy use intensity, equal to a total of 3.1% EUI reduction.

1.C. Familiarity with Guidelines and Industry Requirements

Our Certified Commissioning individuals with a long experience in the industry have attained expertise with a variety of commissioning guidelines and Requirements Manuals which applied on project that we take on as required. Some of these guidelines include:

- American Commissioning Group (ACG) Commissioning Guidelines
- ASHRAE Guidelines 0 – The Commissioning Process
- ASHRAE Guidelines 1.1 - HVAC&R Technical Requirements for the Commissioning Process
- USGBC LEED v4.1 (and Previous Versions)
- U.S. Department of Veterans Affair the Whole Building Commissioning Process Manual
- Department of Energy (DOE) and Federal Energy Management Program (FEMP) Commissioning for Federal Facilities Guide

1.D. Staff Ability and Commitment

Our primary objective and mindset in performing commissioning activities, and as the owner's partner, is to ensure their interest is protected and project is delivered to meet their requirement. We strongly believe in team work and we will endeavor to maintain our critical role as a member of the Owner's team in achieving their project goals. All of our key personnel possess the experience, knowledge, expertise, and commitment necessary for the successful completion of all task orders assigned under this contract. Our proposed key personnel have the necessary background, education, and credentials required to properly evaluate, analyze, and complete all of the task orders issued under this contract. Our team has the expertise necessary to perform all of the activities required under this contract and is fully capable in providing the Virginia Tech and its affiliated corporations and/or partnerships, utilizing resulted contract, with the level of professional services expected. SBS staff stands ready to commit their ability and technical resources towards the successful completion of this contract. Additional information and resumes of proposed team is provided in Section 2 of this proposal.

1.E. Ensuring Quality

On every tasked assigned our program managers communicate directly with the contracting office, owners' representative, and their project managers and monitor projects status, progress, and outstanding issues so that problems can be avoided and quality of service can be ensured. We continuously strive to improve our processes, thus we actively communicate with clients' commissioning and energy management representatives to implement and integrate their recommendations into our project approach. We generate quality check records based on the reports reviewed and we incorporate feedback from owners during each deliverable review. This will verify commissioning and audit activities and deliverables for errors, omissions, and quality. We have provided a more detailed explanation for our quality control process relative to our proposed services in "Section 3.C – Management & Quality Control Process "of this proposal.

1.F. Demonstrated Customer Satisfaction

Our clients have continued working with us because we strive to understand their needs and find efficient and viable solutions to their building commissioning, energy use, and operational problems. SBS team of experts has the knowledge of today's emerging building energy technologies and how they need to interact to optimize performance and operational efficiency. Our team has always employed a proactive approach towards ensuring customer satisfaction and has maintained a history of continual and long-term professional relationship with most of our clients. Since established, we never had any contract or task order cancelled or terminated by either for default or convenience. We understand that quality of our services will be evaluated based on demonstrated experience with similar facilities and projects; ability to meet specific project objectives such as budget, schedule, quality, and ability to respond quickly to assigned projects.

We have proven record of being able to successfully manage various ongoing and diversely located projects simultaneously nationwide. We have accomplished this by proper management, efficient communication, effective task planning and execution, and responsive schedule controls. We develop and maintain a commissioning schedule that will be integrated into the project overall design and construction schedule which will indicate our staff commitment and anticipated duration of time for the completion of each commissioning activity.

We have the exemplary staff and resources necessary to successfully provide commissioning and audit services and we are confident that our team offers the highest quality package of experience and resources for your projects.

SECTION 2. QUALIFICATIONS AND EXPERIENCE

This section refers to item 2 of Selection Criteria, "*Qualifications and experiences of Offeror in providing the goods/services*" as it is required in the section *VIII-SELECTION CRITERIA AND AWARD* of the RFP. Smart Building Strategies LLC (SBS) is a small business headquartered in Northern Virginia.

We partner with building owners to ensure their facility is constructed per their requirements and the design intent and also provide them with recommendations to optimize their facilities energy performance and indoor air quality. Below we have outlined a summary of our company's overall offered solutions and services:

2.A. Commissioning Services

We have been applying our commissioning process on variety of facilities types and related building systems. Our commissioning services cover new constructions, renovations, as well as existing buildings. SBS commissioning services include the followings:

2.A.1. New Construction Major Renovation Commissioning

Our Commissioning (Cx) services comprise of systematic process of verifying and documenting that building systems are designed, installed, and operating to meet facility owner's objectives while focusing on maximizing the performance and efficiency. Our Commissioning services assist the owner and the project team to identify potential issues in advance to reduce project risks and delays with overall goal of delivering productive and healthy environment for the end-users and building occupants. We also ensure that the building maintenance staff is prepared to operate and maintain the facility systems efficiently and effectively.

We have been applying our commissioning process to a variety of building systems, including Heating, Ventilation, and Air Conditioning (HVAC) and associated controls, electrical (power distribution and lighting), plumbing, fire & life safety, building envelope, elevators, data, communication and security, as well as other specialty systems. Our commissioning services assist our clients with new construction projects seeking USGBC LEED Certification. Over the years we have supported Federal and State Government agencies and entities with their projects commissioning needs and have proven the effectives of independent and third-party commissioning services. We have been implementing our commissioning process, on many Federal, State and Local government buildings, and we have outlined some of the project examples in Section 2.G of this submission. Following is the list of commissioning activities that our staff typically gets involved on the new construction and major renovation projects:

- Lead commissioning activities.
- Lead commissioning kick-off and coordination meetings
- Develop/assist to develop Owner's Project Requirements (OPR)
- Review & comment on Basis of Design (BOD)
- Review & comment on design documents (starting from SD)
- Develop Commissioning specification Technical support during the project Design and Construction Phases related to Commissioning (as applicable to the scope of commissioning)
- Develop and update Cx Plan
- Review of equipment submittals
- Develop equipment specific pre-functional checklist (PFC).
- Develop and maintain of Cx deficiencies logs and ensure resolution
- Field verify the pre-functional checklist completed by contractors
- Verify and document system start-ups
- Review, document, and spot check TAB reports.
- Ensure completion and review contractor performed tests such as system flushing, duct and pipe

pressure tests.
- Develop equipment functional performance test (FPT) forms
- Direct, witness, and document functional performance testing of systems being commissioned and associated components and controls
- Review for completeness and document assembled systems O&M manuals
- Ensure and document training for facility O&M staff
- Ensure and document submission of equipment and systems warranties
- Provide final commissioning report to include all pertinent commissioning data and project documentation.
- Direct, witness, and document deferred and seasonal testing, as applicable to the scope of project.
- Conduct follow up site visit (within 10 months) in warranty period to identify operational issues
- Develop on-going commissioning plan (as applicable)
- USGBC LEED support and documentation relative to commissioning services (as applicable to the scope of commissioning)
- Update commissioning report to include post construction activities and updates.
- Monitoring Based and On-going commissioning activities to meet project requirements

Below are some of the building systems that our team of experts has commissioned:

- HVAC &R
- Building Automation & Energy Management
- Plumbing & Domestic Hot water
- Steam Generation
- Renewable Energy (Solar, Wind, geothermal, etc.)
- Electrical Power Distribution
- Emergency Power & Generators
- Lighting & Day-Lighting Control
- Life Safety (Fire Protection & Suppression)
- Smoke Control
- Building Envelope
- Vertical Transportation (Elevators)
- Network & Building Communication
- Security System & CCTV
- Water & Storm Water Management
- Water Treatment

2.A.2. Retro-Commissioning

Our Retro-Commissioning process is a systematic producer that is applied to existing buildings for identifying and implementing operational and maintenance improvements and for ensuring continued performance and efficiency over time. Through our retro-commissioning services, we not only assist clients to optimize their building system operation but also to ensure systems integrated functionality. Even though in the past our retro-commissioning may have resulted to capital improvements recommendations, but the primary focus has been on using O&M tune-up activities and diagnostic testing to optimize the building systems operation. Our retro-commissioning improves building operations and maintenance (O&M) procedures to enhance overall building performance. Our retro-commissioning objectives have included the following main factors:

- Optimize control systems through calibration of sensors, review of trend logs data, and functional equipment testing;
- Identify and resolve building system operation, control, and maintenance problems;
- Reduce or eliminate occupant complaints and increase occupant satisfaction;
- Improve indoor environmental comfort and quality;
- Document system operation;
- Identify operational and maintenance enhancements that result in improvements in energy efficiency, occupant comfort, or indoor air quality;
- Identify the operations & maintenance (O&M) personnel training needs; and Extend equipment life-cycles.

2.A.3. Re-Commissioning

We execute our commissioning process on the existing buildings that have previously undergone commissioning process during the construction, as a result of the change of building use, ownership or to address operational issues. Our commissioning services have also assisted existing facilities seeking USGBC LEED Certification.

2.A.4. Continuous & monitoring based commissioning

We develop and implement commissioning procedures for our client to continuously monitor and assess their facility systems operation and energy consumption. With our continuous commissioning services, our clients optimize and maintain their facility performance on an on-going basis. This includes monitoring based commissioning services in support of meeting the requirement outlined in USGBC LEED v4 Enhanced Commissioning Option 1, Path 2. [redacted]

2.B. Energy Management Services

Our energy engineers have been applying their energy management knowledge and expertise assisting clients achieving their energy and water saving objectives. Our energy management services include:

2.B.a. Energy Audit

SBS Energy audit services has been applied to existing buildings with the objective of identifying energy efficiency and cost saving opportunities for building systems and its components. Scope of facility energy audits varied from a basic walk-through (ASHRAE Audit Level I) to more comprehensive audit that requires in-depth testing, measurement, and calculation. Our Energy audit services have resulted in energy and water conservation measures or facility improvement measures that can be implemented to the building and its systems through low cost/ no cost improvement or capital improvement projects. SBS Energy audit services offers full range of developing, executing, and reporting on audit plans, data collection/analysis, benchmark with tools such as Energy Star, and written recommendations of suggested energy/water conservation measures and infrastructure upgrades.

[redacted]

2.B.b. Energy Planning & Strategies

We have been providing comprehensive energy management solution that assists our clients with a variety of energy projects. Our energy management and planning services comprises of following components:

- Consulting/Auditing/Energy management solutions
- Measurement and verification

2.B.c. Energy Consulting

SBS Energy Consulting Services provide expert advice, assistance, guidance or counseling on energy-related projects or initiatives to assist government agencies in adhering to legislation such as EPACT 2005, Executive Orders 13423, 13514, and 13693. Examples of services include: energy management or strategy, energy program planning and evaluations; energy related studies, analyses, benchmarking and reporting.

2.B.d. Energy Program Support

SBS energy program support provides assistance to client in their pursuit of Energy efficient buildings certification programs such U.S. Green Building Council (USGBC) Leadership in Energy and Environmental Design (LEED); Green Globes and Energy Star.

2.C. Experience and Ability to Perform

This section provides information relative to our ability and experience to perform and act as Virginia Tech Commissioning Authority on their future projects.

2.C.1. Simultaneous On-going Projects

One of the main challenges that service provider generally face is their capacity to perform and being able to provide services simultaneously on several task orders. In order to meet the projects commissioning requirement and schedule, the service provider must have experienced commissioning experts and recourses that can efficiently plan and execute commissioning activities. Continuous communication with the project team and properly incorporating commissioning activities into the overall project schedule are also other key elements in successfully delivering commissioning requirements and managing simultaneous projects. At SBS, we have proven record of being able to successfully manage various ongoing and diversely located projects simultaneously locally and nationwide. We accomplish this by proper management, efficient communication, effective task planning and execution, and responsive schedule controls. We will apply our practical project management and planning as explained in proposal, Section 3.C of this submission to ensure all assigned task orders are adequately staffed with qualified and certified commissioning experts and properly scheduled and monitored for the highest standard commissioning services delivery and Owner's satisfaction. Over the year we have successfully delivered and completed commissioning activities on many projects nationwide. Below list includes our completed commissioning projects over the past 2 years:

- Virginia Tech Student Athlete Performance Center, Blacksburg, VA
- National Archives and Records Administration Chiller Replacement, Collage Park, MD
- USACE Unaccompanied Enlisted Personnel Housing, Fort Belvoir, VA
- NAVFAC Building 559 Renovations NSF Indian Head, MD
- NAVFAC Building 302 Renovations NSF Indian Head, MD
- NAVFAC Building 1685 Renovations NSF Indian Head, MD
- Amtrak APD & EW Facilities, Washington DC
- VCU Shafer Street Playhouse AHU Replacement, Richmond VA
- VCU Murry N DePillars AHUs Replacement, Richmond, VA
- USACE Building 201 HVAC Renovations, Ft. Myer Arlington VA
- Renovate Endoscopy VA Medical Center, RI
- Relocation of Inpatient Pharmacy, VA Medical Center Birmingham, AL
- Harwood Center VA Medical Center, Providence RI
- HVAC Controls Upgrades VA Medical Center Providence RI
- Cooling Towers Replacements VA Medical Center Albany, NY

2.C.2. Consistent Quality Delivery & Importance of Owner's Support

We are committed to provide consistent quality service to meet the owners' overall satisfaction on all commissioning projects. In delivering successful commissioning, owner project managers' support to the commissioning process and commissioning authority is essential. Owner's project manager will play a big role in assisting the commissioning authority to ensure design team, contractors, and other commissioning team members take necessary actions to achieve resolutions on all commissioning identified issues from early stages of design through acceptance phase and post construction. While we have proven record of maintaining consistent commissioning approach, managements, technical knowledge and commissioning process, without owner's proper support, delivering the consistent quality commissioning service becomes

challenging. We always put great emphasis on clear and transparent communication with the owners and its representatives to ensure with our efforts and their adequate support we can execute all commissioning activities with consistent results and the same level of quality service on all task orders assigned.

2.C.3. Staff Capability and Staff Turn-Over

Another challenge that consultants performing under term contracts may face is the assignment of knowledgeable and technical capable individuals to all task orders and also maintaining the level of competency, expertise, and experience throughout of the project duration. In short, the challenge is to avoid providing the owner with different individual representations and commissioning experts throughout a project or inconsistency in the level of expertise on different projects. In order to mitigate this challenge, regardless of key personnel assignment for our projects, they will all be executed, managed, and monitored by our proposed Program Managers. Our program managers are licensed professional engineers who are certified commissioning authorities, with many years of experience providing commissioning services. We ensure that on all matters, functions, issues, and concerns relative to Virginia Tech's projects commissioning scope; they will always communicate directly with the program managers presented in this proposal, should we get awarded this commissioning term contract.

2.C.4. Ability to Respond to the Filed Short Notice Needs

We understand that quality of our services will be evaluated based our ability to meet specific project objectives such as budget, schedule, quality, and ability to respond quickly to the assigned projects requests. We understand that during the course of a project, regardless of how thorough things might have been planned, there is always a chance of things going out of the radar and unforeseen circumstances may arise to the surface. Providing high level of quality services will require quick response time to the client's requests. Depending on many variables, it may become challenging to respond promptly to all the changing project needs and field conditions. With main offices in Ashburn, VA; SBS proposed key personnel have local presence with driving proximity to Virginia Tech main campus at Blacksburg and Northern Virginia projects. As the commissioning authority, while commissioning services may not require emergency response, under this contract we are ready to commit a remote/phone response within 4 hours and on-site response within 24 hours during the normal business hours.

2.D. Educational Facilities Experience

We have been implementing our commissioning process on variety of building type at Federal, State and Local government facilities, and specifically as related to this contract, Educational Facilities. Below we have listed some of our recent and current educational facilities projects as relate to this contract:

- Gail S. and Bruce E. Boyer Health Professions and Wellness Center, Takoma Park MD
- Virginia Tech Rector Field and Softball Facilities Improvement, Blacksburg, VA
- Virginia Tech Baseball Facilities & Weaver Building Improvements, Blacksburg, VA
- Virginia Tech Student-Athlete Performance Center Improvements, Blacksburg, VA
- Virginia Tech Data & Decision Sciences Building, Blacksburg, VA
- Virginia Tech New Upper Quad Residence Hall, Blacksburg, VA
- Virginia Tech Hitt Hall & Intelligent Infrastructure Complex, Blacksburg, VA
- Virginia Tech Mitchell Hall, Blacksburg, VA
- Virginia Military Institute Corps Physical Training Facility Phase III - Lexington, VA
- Virginia Commonwealth University, Shafer Playhouse AHU Replacement, Richmond, VA
- Virginia Commonwealth University, Murry N DePillars AHUs Replacement, Richmond, VA
- Virginia Commonwealth University, Technology Operation Center, Richmond, VA
- CCPS HVAC Replacement Curtis Elementary School, Richmond, VA
- CCPS HVAC Replacement Weaver Elementary School, Richmond, VA
- CCPS HVAC Replacement Hopkins Elementary School, Richmond, VA
- CCPS HVAC Replacement Wells Elementary Schools, Richmond, VA

- CCPS HVAC Replacement Ecoff Elementary School, Richmond, VA
- CCPS HVAC Replacement Alberta Smith, Elementary School, Richmond, VA
- CCPS HVAC Replacement Clover Hill Elementary School, Richmond, VA
- CCPS HVAC Replacement Woolridge Elementary School, Richmond, VA

2.E. Proposed Team

SBS Key Personnel are fully familiar with the design and operation of many facility types including, general office buildings, educational, medical centers, laboratories, data centers, network communication centers, and mission critical facilities. Our exemplary professional staff will successfully provide commissioning services as required on this project and we are confident that our team offers the best package of experience, resources, and corporate commitment to serve as your commissioning authority.

2.E.1. Overall Key Personnel Qualifications and Experience

Our team has been assembled to include certified and experienced industry leaders in building commissioning and energy management services. SBS team prides itself on its diverse pool of professionals and resources comprised of professional engineers and certified commissioning authorities. The proposed key personnel experience, qualification, credentials and areas of strength related to commissioning services Include:

- Possess necessary licenses, certifications, and credentials to successfully complete the commissioning activities including:
  - Professional Engineering Licenses
  - ACG Certified Commissioning Authority (CxA)
  - Energy Management Professional (EMP)
  - Certified Energy Manager (CEM)
  - USGBC LEED Accredited Professional (LEED AP)
  - Building Enclosure Commissioning Process Provider (BECxP)
  - Accredited Commissioning Authority + Building Enclosure (CxA+BE)
  - US Army Corps of Engineers EM 385 (USACE EM385)
  - NICET for Electrical Power Testing (NICET EPT)
  - Registered Architect
  - Project Management Professional (PMP)
  - OSHA30 Training Certification
- Certified commissioning authorities with wide-ranging experience providing commissioning services on millions of Sq.Ft. nationwide and international.
- Successfully managed and led several federal & state multi-year commissioning term contracts nationwide.
- Extensive field experience providing commissioning services for various types of facilities including State & Local Government and Municipal facilities.
- Extensive experience in managing several on-going and simultaneous commissioning and retro-commissioning projects nationwide.
- Strong knowledge, experience, and capability in leading and coordinating all commissioning activities with projects' commissioning team including the contractor, designer, and the owner. They possess necessary project management skills including project organization & team work and commissioning activities scheduling to efficiently execute commissioning activities.
- Full understanding, expertise, and experience in providing commissioning services in accordance with USGBC LEED v4 guideline (and previous versions) for LEED Fundamental and Enhanced commissioning.

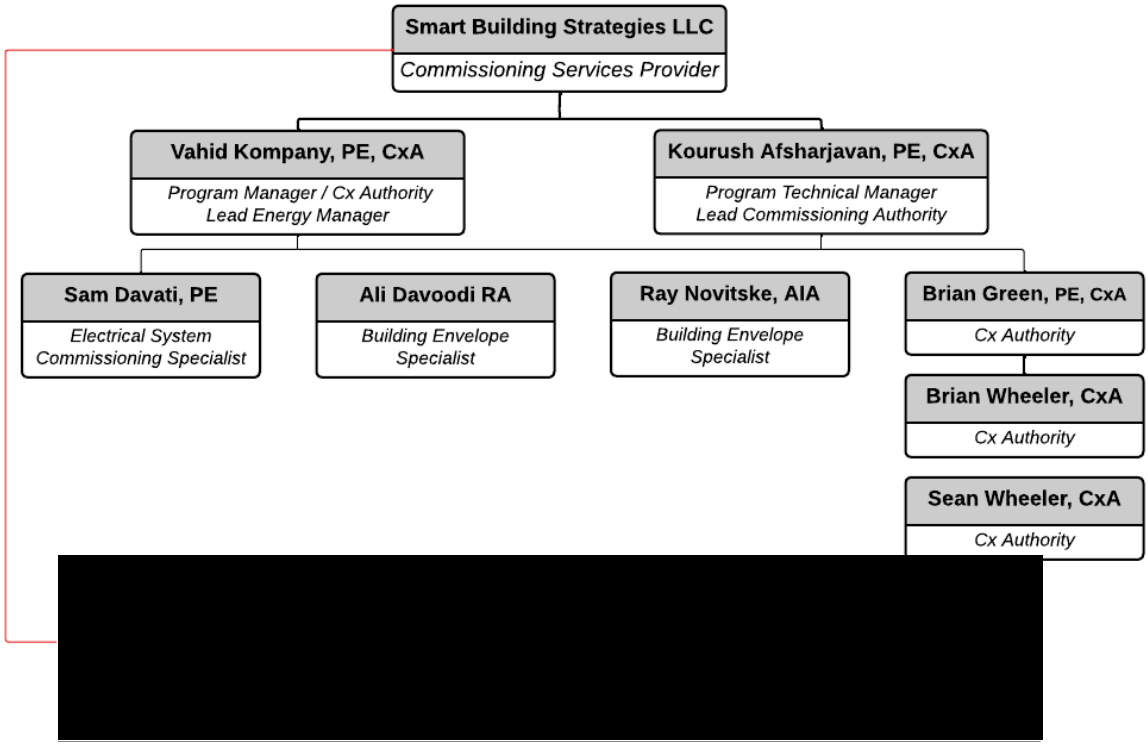
- Experience in commissioning of both design-bid-build and design-build project delivery.
- Extensive experience and knowledge in development, execution, and documenting of all commissioning requirements and deliverables from the design development phase through post construction and occupancy.
- More than 15 years of experience in providing commissioning services for large, high-performance mechanical (HVAC) equipment and systems such as central energy plants, chillers, boilers, pumps, heat exchangers, and cooling towers.
- Extensive experience in design, specification, installation, commissioning, and testing of major building systems, including Mechanical, Plumbing, Electrical systems; as well as other buildings' specialty systems such as fire alarm systems, and security systems.
- Extensive experience in testing, commissioning, and trouble-shooting of energy management & controls systems and enhancing commissioning performance by using the facility DDC control system to expedite the commissioning process.
- Experienced in energy-efficient equipment design and control optimization strategy.
- Experienced in writing commissioning specifications.
- Extensive Knowledge in building operation and maintenance and O&M training.
- AND, our company is a member of the US Green Building Council (USGBC), AABC Commissioning Group (ACG), and Energy Management Association (EMA).

Proposed key personnel have been assembled to include certified and experienced industry leaders in building commissioning and energy management services. The reporting relationship and the hierarchy of their authority are presented in the organizational chart in the following Section.

Name	Title/Position
Vahid Kompany	Program Manager / Commissioning Authority and Lead Energy Engineer
Kourush Afsharjavan	Program Technical Manager/ Lead Commissioning Authority
Raymond Novitske	Building Envelope Specialist
Ali Davoodi	Building Envelope Specialist
Sam Davati	Electrical System Commissioning Specialist
Brian Green	Commissioning Authorities
Brian Wheeler	Commissioning Authorities
Sean Wheeler	Commissioning Authorities

2.E.2. Proposed Organizational Chart

As previously explained our proposed team of individuals is assembled of a team of experts with vast and diverse experience in this industry and commissioning services. This team of professionals will stand ready to serve the Virginia Tech with their commissioning and energy audit services needs on this contract and will be led by our program management team that has many years of experience in delivering commissioning task orders for federal, state and local government. Chart below depicts our proposed organizational arrangements and their lines authority and hierarchy. It also includes our proposed subcontractors to include additional services (outlined in section 2.F) into our solution package for this contract.

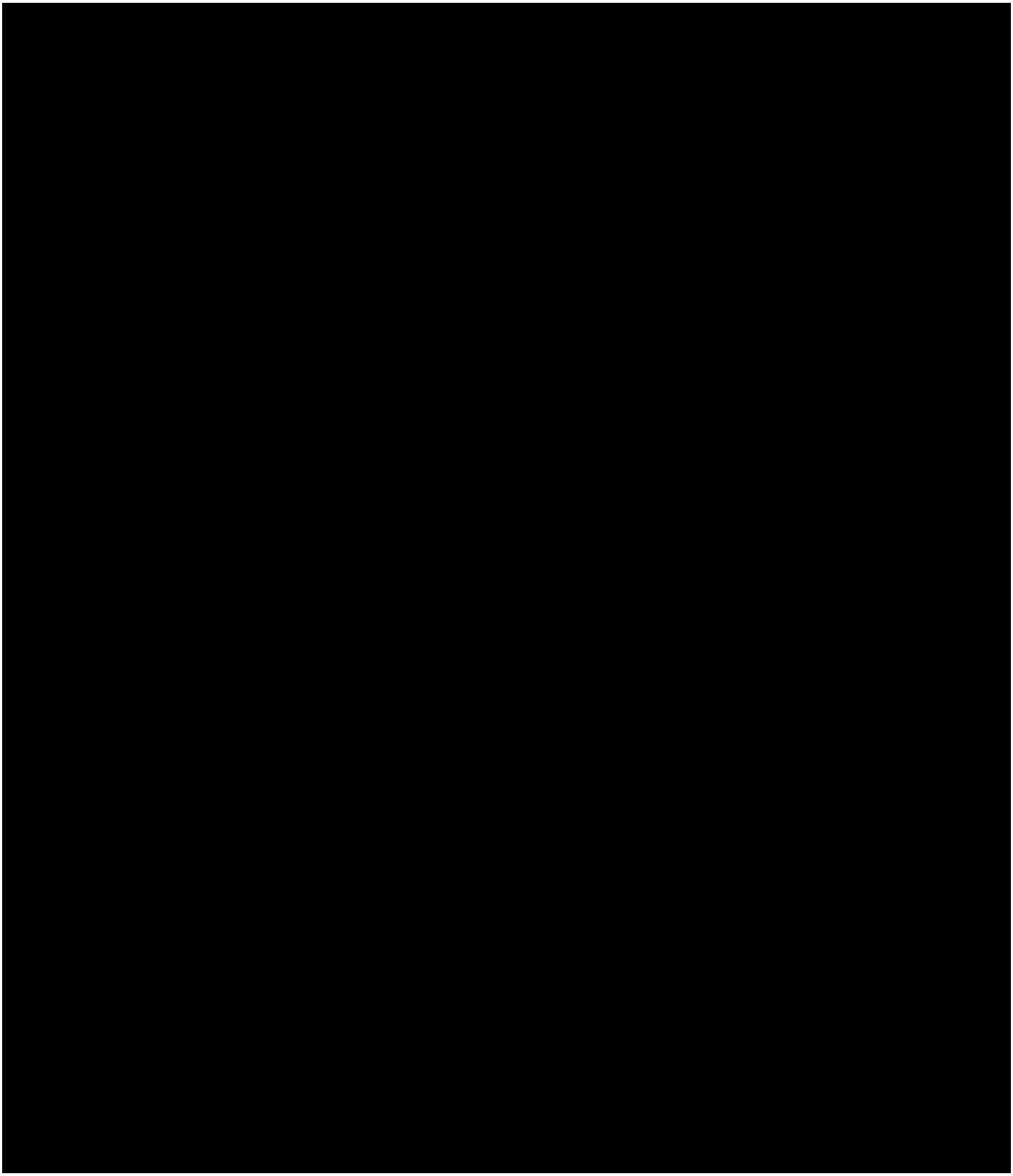


2.E.3. Resumes of proposed Team

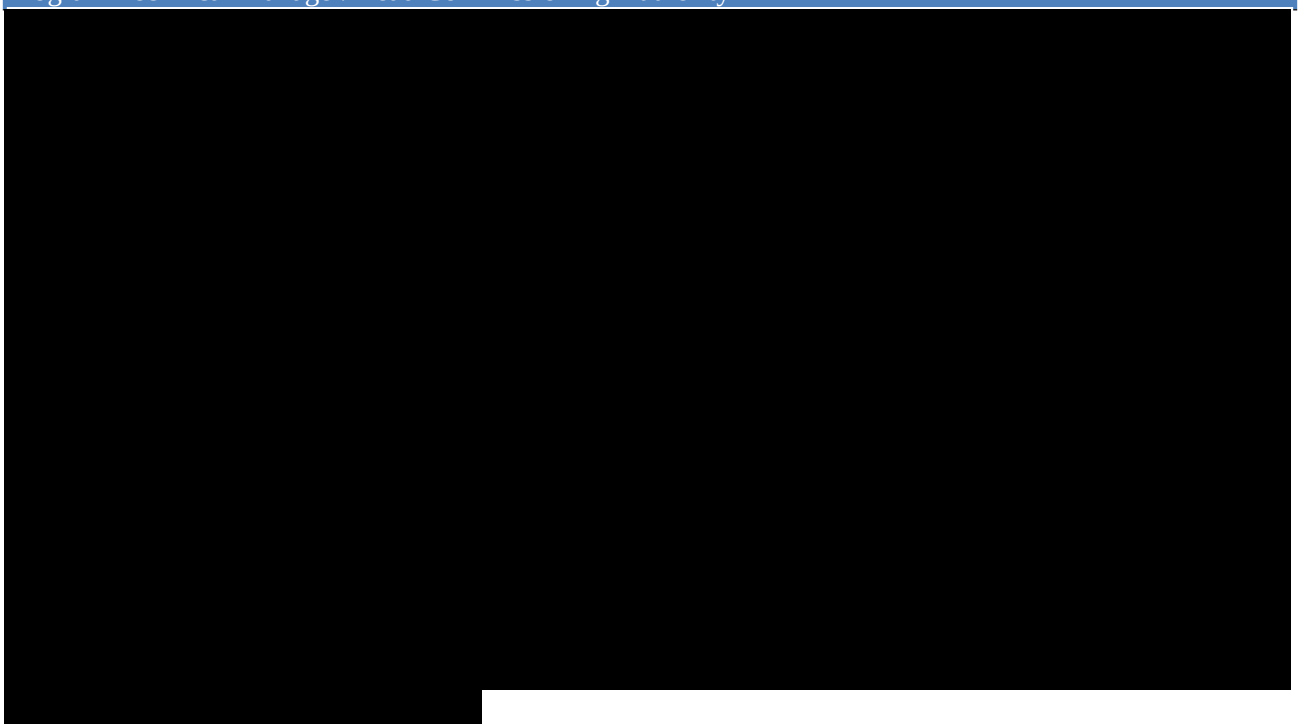
In this section we have provided the resumes of key individuals who will be performing the commissioning activities under this contract. All the commissioning activities under this contract will be performed by qualified commissioning experts and under complete supervision of Program Managers who are licensed professional engineers (PE) and certified commissioning authorities by AABC Commissioning Group (ACG). Our lead commissioning authority and program technical manager is a certified commissioning authority that is a Licensed Professional Engineer.

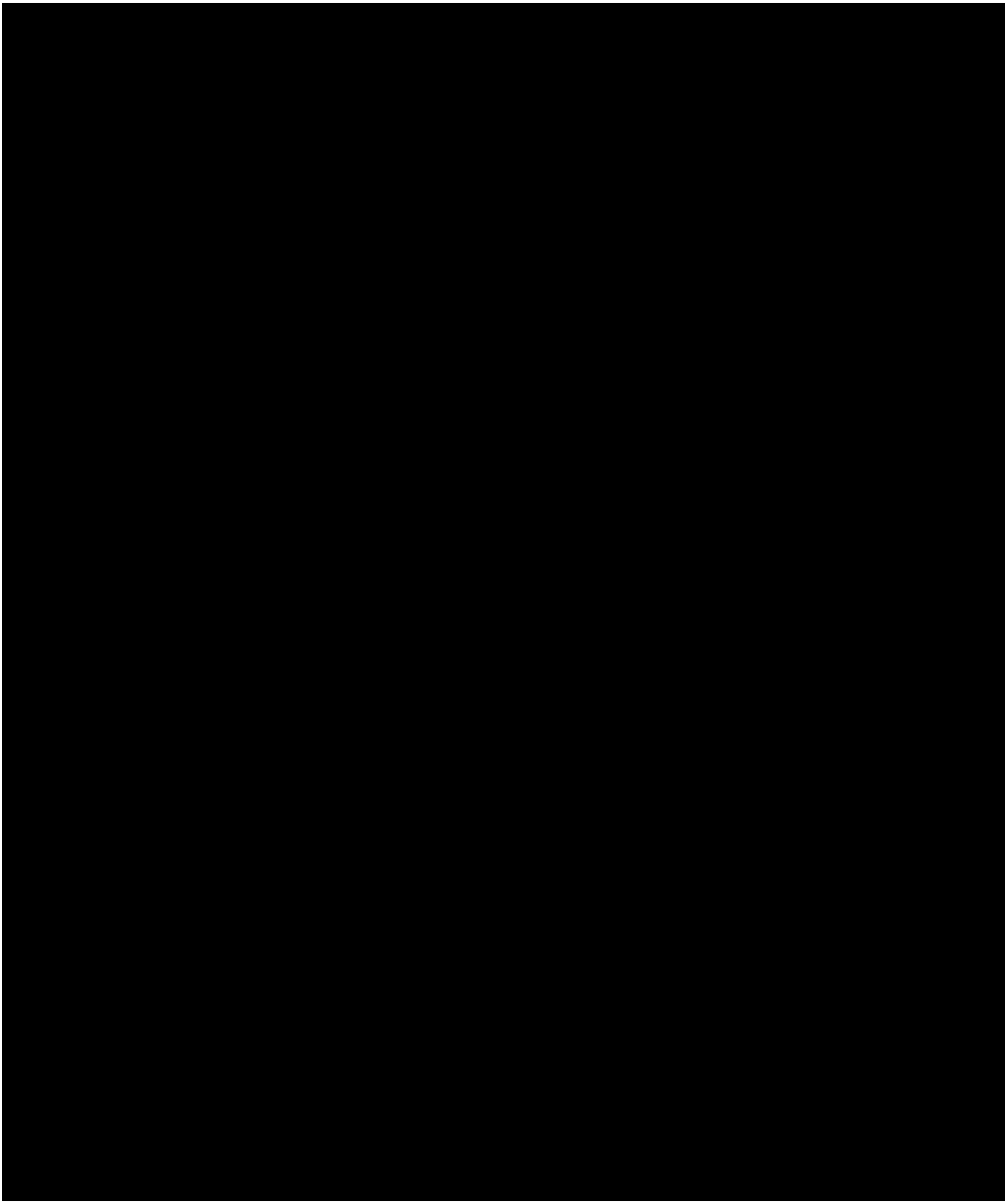
Vahid Kompany PE, CxA, EMP, LEED AP *BD+C*
Contract Program Manager and Commissioning Authority

[redacted]



Kourush Afsharjavan PE, CxA, PMP, LEED AP ***BD+C***
Program Technical Manager/ Lead Commissioning Authority





[redacted]

Raymond A. Novitske, AIA
Building Envelope Specialist

[redacted]

[redacted]

Ali Davoodi, RA
Building Envelope Specialist

[redacted]

[redacted]

Sam Davati, PE
Electrical System Commissioning Specialist

[redacted]

[redacted]

Brian M. Green PE, CxA, BECxP, CxA+BE CEM, LEED AP - CCI
Commissioning Authorities

[redacted]

[redacted]

Brian T Wheeler, CxA, LEED AP, NIULPE-CCI
Commissioning Authorities

[redacted]

[redacted]

Sean Wheeler, CxA-CCI
Commissioning Authorities

[redacted]

[redacted]

2.F. Proposed Additional Services and Sub-contractors

To expand our capabilities, SBS has integrated additional services and technologies into our offered services, utilizing our sub-contractors and business partners, to present a comprehensive solution package to our clients' facility maintenance and energy management needs. To summarize these additional services include:

- [redacted]
- [redacted]
- [redacted]

We have been able to build on strong acquaintances with industry teams of experts that enabled us to continually improve our services, expand into new and exciting fields, and better serve our clients' objectives. Below we have provided information related to our sub-contractors and business partners in this section.

2.F.1. [redacted]

[redacted]

[redacted]

[redacted]

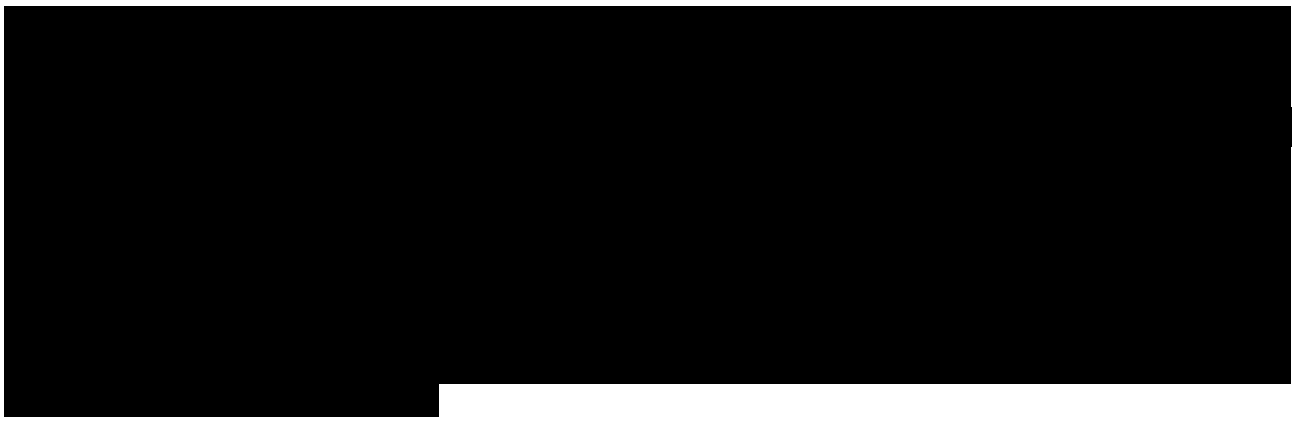
[redacted]

[redacted]

[redacted]

[redacted]

[redacted]



2.G. References

SBS has been serving Virginia Tech as one of the prequalified commissioning firms under the existing VASCUPP term contract and we are confident that Virginia Tech project managers and Virginia Tech commissioning team can confirm our team ability and capability in performing and delivering high quality commissioning services on our past and active Virginia Tech project. While we understand that the RFP requires only four (4) relevant references, but in order to list references from both Virginia Tech and other clients, in this section we have included three (3) sample projects at Virginia Tech Blacksburg campus as well as three (3) more references from other educational or governmental projects. Our staff has worked with Federal, State and Local government clients over the years and each can attest to the level of our professionalism and quality of services.

Project 1. Virginia Tech Women's Softball and Rector Field House Improvements – Blacksburg, VA
Scope: USGBC LEED V3 Fundamental / Construction Phase

Building Image source: https://hokiesports.com/news/2018/11/29/track-field-hokies-add-to-distance-groups-with-latest-recruiting-haul.aspx

Owner:	*Virginia Polytechnic Institute and State University*
Facility Type:	*University – Indoor football field and Track*
Facility Size:	*77,000 SF*
Contract Number:	[redacted]
Award Date:	*10/24/2017*
Contract Type:	*Task order awarded by the Owner under VASCUPP Commissioning Term Contract*
Contract Amount	*Upon Request*
Period of Performance:	*October 2017 – September 2018*
Commissioning Scope:	*USGBC LEED V3 Fundamental / Construction Phase*
Client Name & Address:	*Virginia Polytechnic Institute and State University*
Client Point of Contact:	[redacted]

Summary: SBS performed as Commissioning Authority to meet USGBC LEED Fundamental requirement on this project under our current commissioning term contract. Rector Field House contains a full-size AstroTurf football field and a 200-meter, banked indoor track. The renovated and expanded Rector Field House include improved Olympic indoor sports facilities including Track and Field and Softball batting, fielding, and practice facilities. Support spaces serving the public include new entry lobbies, new and expanded restrooms, and new spectator seating. Support space for participants includes training, team, official's rooms, and storage areas. The Rector Field House project included 77,000 SF facility with improvements area consisting of approximately 44,000 SF. Project duration for commissioning services was 12 months with completion date of September 2018.

Commissioned system: HVAC & Refrigeration Systems & Controls including VAV air-handling units, rooftop units, heating ventilator units, energy recovery units, variable air volume terminal units, boilers, hot water unit heaters hydronic cabinet unit heater, pumps, expansion tank, glycol make-up unit, air separator, ventilators, air curtains, exhaust fans, and associated controls, domestic hot water systems, and lighting controls.

Project 2. Virginia Tech Student Athlete Performance Center, Blacksburg, VA
Scope: USGBC LEED V4 Fundamental & Enhanced / Design/Construction/Warranty Phase

Building Image source: https://vtnews.vt.edu/articles/2017/12/athlete-performance-center.html

Owner:	*Virginia Polytechnic Institute and State University*
Facility Type:	*University – Student Athlete Performance Center Dining Facility*
Facility Size:	*27,045 SF Renovation and Addition*
Contract Number:	[redacted]
Award Date:	*12/17/2018*
Contract Type:	*Task order awarded by the Owner under VASCUPP Commissioning Term Contract*
Contract Amount	*Upon Request*
Period of Performance:	*December 2018 – September 2021*
Commissioning Scope:	*USGBC LEED V4 Fundamental & Enhanced/Design/Construction/Warranty Phase*
Client Name & Address:	*Virginia Polytechnic Institute and State University*
Client Point of Contact:	[redacted]

Summary: SBS is contracted by Virginia Tech under its current commissioning term contract to provide commissioning services for this project to meet USGBC LEED V4 ID+C Fundamental & Enhanced Commissioning requirements. The Virginia Polytechnic Institute and State University (Virginia Tech) Athlete Performance Center (SAPC) project scope consisted of renovation and addition to Jamerson Athletic Center in Blacksburg, VA. The fourth floor of Jamerson converted into a new dining facility that focuses on providing student athletes with performance-based nutrition as well as supporting the vision to provide a leading-edge dining facility for Virginia Tech athletics.

Commissioned Systems: Per the USGBC LEED V4 ID+C EA Prerequisite: Fundamental Commissioning and Verification & EA Credit Enhanced Commissioning - Option 1 -Path 1 (3 Points) Requirements - HVAC & refrigeration systems & controls, Domestic hot water system, Electrical system including lighting and lighting control, and power.

Project 3. Virginia Tech Data & Decision Sciences Building, Blacksburg, VA
Scope: USGBC LEED V4 Fundamental & Enhanced / Design/Construction/Warranty Phase

VIRGINIA TECH

Building Image source: https://www.facilities.vt.edu/planning-construction/campus-construction-projects/active-projects/DataandDecisionSciences.html

Owner:	*Virginia Polytechnic Institute and State University*
Facility Type:	*University – Data processing and visualization, Classes and Offices*
Facility Size:	*120,000 SF*
Contract Number:	[redacted]
Award Date:	*11/04/2019*
Contract Type:	*Task order awarded by the Owner under VASCUPP Commissioning Term Contract*
Contract Amount	*Upon Request*
Period of Performance:	*November 2019 - Ongoing*
Commissioning Scope:	*USGBC LEED V4 Fundamental & Enhanced/Design/Construction/Warranty Phase*

Client Name & Address:	*Virginia Polytechnic Institute and State University*
Client Point of Contact:	[redacted]

Summary: SBS is contracted by Virginia Tech under its current commissioning term contract to provide commissioning services for The Data and Decision Sciences Building (D&DS) to meet USGBC LEED V4 Enhanced Commissioning requirements. D&DS is one of four buildings initiated in the Global Business Analytics Complex.. The new 5 story Collegiate Gothic facility will be approximately 119,931 square feet and will become paired with a later-phased, inter-connected academic building and future home of the Pamplin College of Business. The building will administrative, educational, and support spaces associated with faculty and graduate-level research for these three colleges. In addition to these functions, the building will also provide numerous classroom types with intense computing power and state-of-the-art data processing and visualization. This project is currently at construction phase and as the commissioning authority, SBS has developed the commissioning specification and design phase commissioning plan, and provided progress reviews of preliminary design, working drawings, and final construction documents.

Systems to be commissioned: Per the USGBC LEED V4 BD+C EA Prerequisite: Fundamental Commissioning and Verification & EA Credit Enhanced Commissioning - Option 1 -Path 1 (3 Points) Requirements for mechanical, electrical, plumbing, and renewable energy systems and assemblies, in accordance with ASHRAE Guideline 0-2005 and ASHRAE Guideline 1.1–2007 for HVAC&R Systems, as they relate to energy, water, indoor environmental quality, and durability.

Project 4. USACE Unaccompanied Enlisted Personnel Housing Renovation, Fort Belvoir, VA
Scope: USGBC LEED V4 Fundamental Construction/Warranty Phase

Owner:	*US Army Corps of Engineers*
Facility Type:	*Barracks/Government*
Facility Size:	*148,763 SF*
Contract Number:	[redacted]
Award Date:	*07/20/2019*
Contract Type:	*First Tier Consultant to General Contractor – Per USACE 019100 Commissioning*
Contract Amount	*Upon Request*
Period of Performance:	*July 2019– November 2021*
Commissioning Scope:	*USGBC LEED V4 Fundamental / Construction/Warranty Phase*
Client Name & Address:	*Grunley Construction Company, Inc.* *15020 Shady Grove Road, Suite 500, Rockville, MD 20850*
Client Point of Contact:	[redacted]

Summary: The Design-Bid-Build project includes the renovation of McRee Barrack Buildings 2102, 2103, 2109, and 2110 at Ft. Belvoir, VA to reconfigure units into individual apartments comprised of 4 bedrooms with bathrooms, living area, kitchen, and closets requiring new mechanical, electrical, plumbing, and fire protection systems; and incidental related work. These Buildings known as the McRee Barracks are three-story unaccompanied enlisted personnel housing barracks constructed in 1975 in the VOLAR 3+1 configuration and subsequently converted to the interim 1+1 configuration. There is a total of 148,763 square feet (SF) of space which is in failed condition. Due to a historic lack of funding there has been no major repair of building components and systems since the facilities were converted to the interim 1+1

configuration 19 years ago. Total construction value of this project is approximately $43 Million. Smart Building Strategies LLC was contracted by Grunley Construction, under the MATOC IDIQ Delivery Order: W912DR18F0655 to serve as the commissioning specialist in accordance with USACE project specification section 019100.15 – Total Building Commissioning Requirement.

***Commissioned Systems**:* Commissioned systems include the Heating, Ventilating, Air Conditioning, and Refrigeration Systems (HVAC) and Building Automation System, Utility Monitoring and Control System, Lighting Systems, Power Distribution Systems, Plumbing Systems, Energy and Water Utility Metering Systems and Sub-Meters, and Building Envelope: moisture and thermal integrity and air tightness.

Project 5. VMI Corps Physical Training Facility Phase III – Aquatic Center, Lexington, VA
Scope: USGBC LEED V4 Fundamental & Enhanced / Design/Construction/Warranty Phase

Building Image Source: HKS Working Drawings

Owner:	*Virginia Military Institute (VMI)*
Facility Type:	*University – Offices, Pool & Training facility*
Facility Size:	*58,000 SF*
Contract Number:	[redacted]
Award Date:	*8/29/2019*
Contract Type:	*Task order awarded by the Owner under VASCUPP Commissioning Term Contract*
Contract Amount	*Upon Request*
Period of Performance:	*August 2019 - Ongoing*
Commissioning Scope:	*USGBC LEED V4 Fundamental & Enhanced/Design/Construction/Warranty Phase*
Client Name & Address:	*Virginia Military Institute (VMI)*
Client Point of Contact:	[redacted]

Summary: Corps Physical Training Facility Phase III or the New VMI Aquatic Center construction consists of 58,000 sf of program including the renovation of the American Legion building. The program includes an indoor 50M swimming pool, two 1M springboards, two 3M springboards, and a 5M dive platform. Other program elements to support the Institute's mission for training includes a training room, locker rooms, offices, wet and dry classroom spaces, support spaces, and a spectator seating capacity of 570 people. The Legion Building is renovated to connect to the Aquatics Center and will house a portion of this program. The pool accommodates users including the ROTC, commandant program, physical education, athletics, scuba, staff and general cadets. The pool will see constant heavy use ranging from athletics swim meets to cadets jumping from the 5M platform in full BDUs. This facility will have many state of the art features that will make it a one of the premier facilities in the nation. SBS has been hired by VMI, under its VASCUPP commissioning term contract to serve as the commissioning authority for meeting the LEED Commissioning requirements in compliance with USGBC LEED v4 BD+C.

Systems to be commissioned: Per the USGBC LEED V4 BD+C EA PREREQUISITE: FUNDAMENTAL COMMISSIONING AND VERIFICATION & EA CREDIT ENHANCED COMMISSIONING - Option 1 - Path 1 (3 Points) Requirements for mechanical, electrical, plumbing, and renewable energy systems and assemblies, in accordance with ASHRAE Guideline 0-2005 and ASHRAE Guideline 1.1–2007 for HVAC&R Systems, as they relate to energy, water, indoor environmental quality, and durability.

Project 6. CCPS HVAC Replacement for 4 Elementary Schools, Richmond, VA
Scope: Commissioning Services Construction/Warranty Phase

Owner:	*Chesterfield County Public Schools*
Facility Type:	*K-12 Public School*
Facility Size:	*Varies at 4 elementary schools Curtis, Weaver, Hopkins, and Wells*
Contract Number:	[redacted]
Award Date:	*10/20/2021*
Contract Amount	*Upon Request*
Period of Performance:	*October2021 – On-going*
Contract Type:	*Task order awarded by the Owner under Chesterfield County Term Contract*
Commissioning Scope:	*Construction/Warranty Phase*
Client Name & Address:	*Chesterfield County Public Schools*
Client Point of Contact:	[redacted]

Summary: This project includes design and construction for HVAC replacements at 4 elementary school sites Curtis, Weaver, Hopkins, and Wells. Smart Building Strategies LLC, is contracted by Chesterfield County Public Schools, as the commissioning authority on this project. During the construction phase SBS scope includes: lead and oversee commissioning activities throughout and ensure commissioning plan is fully implemented, review contractors submittals, develop commissioning checklist, functional performance test scripts, and construction phase commissioning plan, conduct periodic site visit to verify systems installations, verify systems startups, lead and witness functional performance tests, verify systems testing and balancing, verify submission of O&M and owners training, and compile final commissioning report.

Systems to be commissioned: HVAC & Refrigeration Systems and Controls: Water Source Heat Pumps Cooling Towers, Condensing Water Boilers, Fans, Pumps, Air Handling Units, Unit Heaters, VAV Terminal Units, Air Separators, Expansion Tanks

SECTION 3. METHODOLOGY

This section refers to item 3of Selection Criteria, "*Specific plans or methodology to be used to provide the Services*" as it is required in the section *VIII-SELECTION CRITERIA AND AWARD* of the RFP.

We are fully familiar with the scope of services required for this contract as outlined in RFP "SECTION VI-STATEMENT OF NEED/SCOPE OF WORK". Below we have outlined the methodology and work plan that we will carry out for awarded task orders under this program. Depending on the type of facility and specific project objectives, some steps may or may not be applicable. This methodology has been provided to illustrate SBS approach to successfully execute and complete commissioning and audit services.

3.A. Commissioning

We are

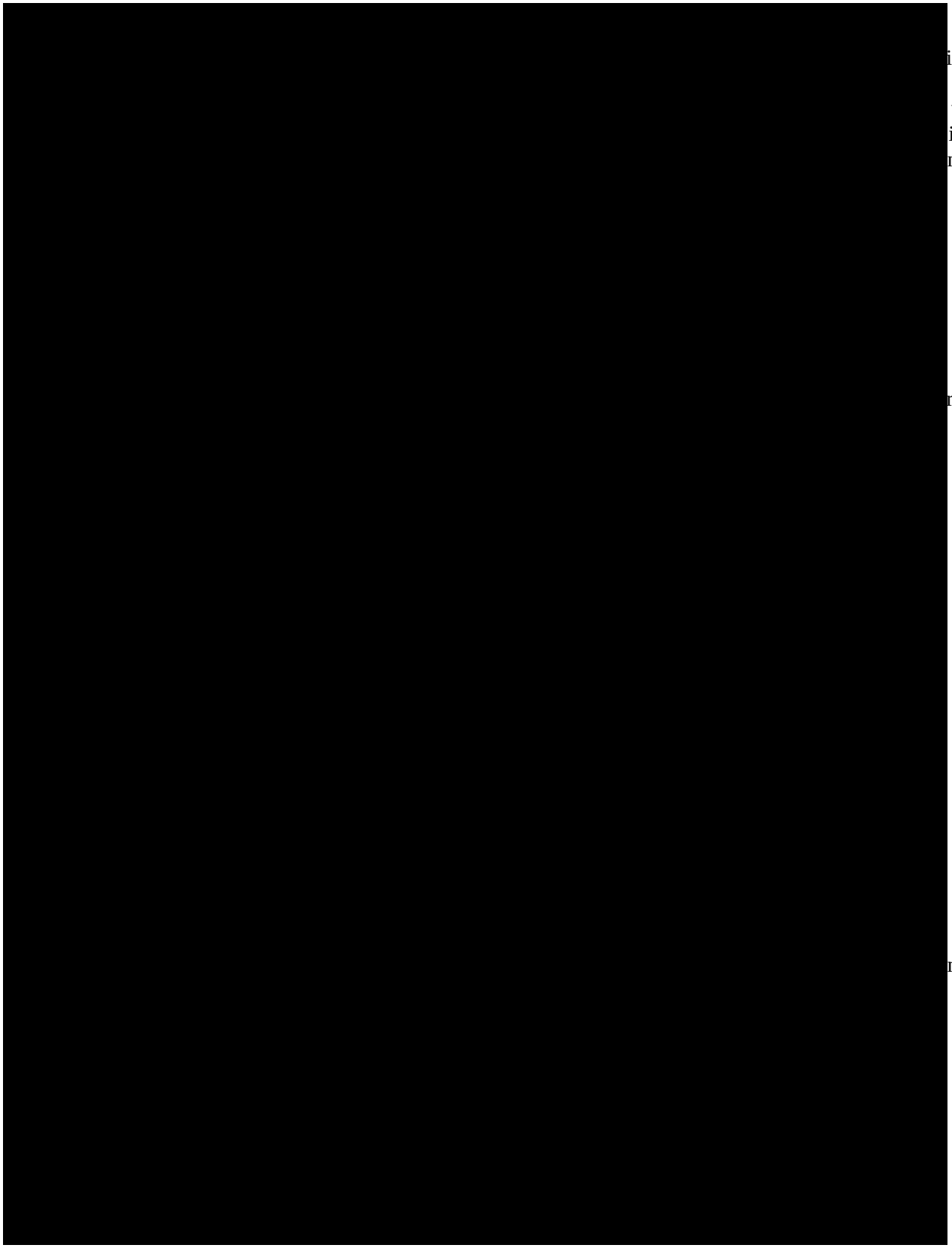
[redacted]

[redacted]

[redacted]

building operation per developed monitoring-based Cx Plan for the first year of occupancy.

3.B.2. [redacted]



- [redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

3.C.4. [redacted]

- [redacted]

[redacted]

[redacted]

3.C.8.

SECTION 4. PRICE

This section refers to item 4 of Selection Criteria, "*Cost (or Price)*" as it is required in the section *VIII-SELECTION CRITERIA AND AWARD* of the RFP.

SBS has been serving Virginia Tech as one of the prequalified commissioning firms under the existing commissioning term contract and we are confident that Virginia Tech project managers and commissioning team can confirm our team's ability and capability in performing and delivering high quality commissioning services on our past and active Virginia Tech project.

We have continuously delivered consistent high-quality engineering services, on-time, and within-cost performance. We have always been committed to assist Virginia Tech in achieving their facility commissioning goals with their full satisfaction while delivering within project budgetary limitations. We have proven that we provide our reliable services with maximum flexibility in budget and schedule.

Table 4.A below outlines SBS's current program rates under our existing Virginia Tech commissioning term contract. Our current rates carry 3% annual escalation for all labor categories.

Labor Category	2017-18	2018-19	2019-20	2020-21	2021-22
Program Director	N/A	N/A	N/A	N/A	N/A
Energy Engineer/Senior Commissioning Authority/Project Manager	130.24	134.14	138.17	142.31	146.58
Project Engineer/ Commissioning Authority	108.25	111.5	114.84	118.29	121.84
Field Engineer/ Commissioning Technician	83.83	86.35	88.94	91.61	94.35
Administrative Assistant	56.86	58.56	60.32	62.13	64.00

Table 4.A - Current Term Contracts Labor Categories and Hourly Rates

With our proposal for this term contract, we are offering 2% annual escalation while keeping the 1st and 2nd year rates unchanged. Table 4.B below outlines our proposed labor categories and associated rates for the resulting contract:

Proposed Labor Categories and Hourly Rates

Labor Category	2022-23	2023-24	2024-25	2025-26	2026-27
Program Director	N/A	N/A	N/A	N/A	N/A
Energy Engineer/Senior Commissioning Authority/Project Manager	149.52	149.52	152.52	155.58	158.7
Project Engineer/ Commissioning Authority	124.28	124.28	126.77	129.31	131.9
Field Engineer/ Commissioning Technician	96.24	96.24	98.17	100.14	102.15
Administrative Assistant	65.28	65.28	66.59	67.93	69.29

Table 4.B - Proposed Labor Categories and Hourly Rates

Below we have highlighted several factors related to our proposed rates:

- Proposed rates are inclusive of all travel costs,

- They are offered by lower annual escalation from our current Virginia Tech contract and our commercial rates,
- Rates are discounted from our published commercial rates (see Table 4.C below),
- They will be applied to ALL Virginia Tech's facilities at all locations, covering Virginia Tech's commissioning and energy audit needs
- They will be offered to ALL VASCUPP partners' commissioning and energy audit needs throughout the Commonwealth of Virginia if they choose to utilize the resulting contract.
- Our highest labor category, "Program Director" is excluded from the proposed list, meaning that in preparation of fee estimates for task orders under this contract, SBS will not utilize "Program Director" category.

For your information and comparisons, below we also have provided our commercial standard rates for your information:

Labor Category	2022	2023	2024	2025	2026
Program Director	187.04	192.66	198.44	204.4	210.54
Energy Engineer/Senior Commissioning Authority/Project Manager	153.71	158.33	163.08	167.98	173.02
Project Engineer/ Commissioning Authority	127.77	131.61	135.56	139.63	143.82
Field Engineer/ Commissioning Technician	98.95	101.92	104.98	108.13	111.38
Administrative Assistant	67.11	69.13	71.21	73.35	75.56

Table 4.C - SBS Commercial Rates

Cost of commissioning services varies depending on the complexity of the commissioned systems, building use and size, and project schedule. Generally the estimated cost of commissioning services per facility square footage reduces, as facility sizes increase. As we have demonstrated our commitment to Virginia Tech throughout our current term contract and assigned task orders, actual cost of services will be evaluated on a task-to-task basis in order to provide quality services at fair cost.

SECTION 5. COMPANY SIZE AND CORPORATE INFORMATION

This section refers to item 5of Selection Criteria, "*Participation of Small, Women-Owned and Minority (SWAM) Business*" as it is required in the section *VIII-SELECTION CRITERIA AND AWARD* of the RFP.

Smart Building Strategies LLC is a small business incorporated in the State of Virginia with the State Corporation Commission ID S5413804. We are a SWaM Certified Small Business with Virginia Department of Small Business & Supplier Diversity (SBSD) and Certification Number 72467.

SBS was established on January 20, 2015 and Commodity Code and Service Codes include:

NIGP Code	Description
961-14	Commissioning of Facilities Services (Functional and Pre-functional)
961-31	Energy Comprehensive Performance Services
910-16	Energy Conservation Services (Including Audits)
918-41	Energy Conservation Consulting
918-42	Engineering Consulting
918-43	Environmental Consulting

SECTION 6.APPENDICES

6.A. Certifications

acg
AABC Commissioning Group

Annual Membership Certificate

Awarded to

Smart Building Strategies, LLC

as a member in good standing of the AABC Commissioning Group for the year

2022

This company has met all requirements for membership and is entitled to all rights and privileges thereof. This certificate is renewable on an annual basis and expires December 31, 2022.

Troy N. Byers, P.E., CxA, *President*

Ray Bert, *Executive Director*

AABC Commissioning Group

hereby certifies that

Vahid Kompany, P.E., LEED AP, CxA

Smart Building Strategies, LLC

has met all prerequisites demonstrating independence and the technical, management, and communications skills required to implement the commissioning process in new and existing buildings, and passed the necessary examination to be awarded this certificate in recognition of their qualifications as an ACG

Certified Commissioning Authority

Registration number: 809-540 . This certificate, valid only for the year 2022, is renewable on an annual basis upon meeting all requirements noted in the CxA Candidate Handbook.

CERTIFIED COMMISSIONING AUTHORITY — acg AABC Commissioning Group — CxA

Justin F. Garner, P.E., CxA
Certification Council Chair

Ray Bert
ACG Executive Director

Better Buildings U.S. DEPARTMENT OF ENERGY
RECOGNIZED PROGRAM
MEETS U.S. DEPARTMENT OF ENERGY GUIDELINES

ANSI ACCREDITED
ISO/IEC 17024 Personnel Certification Program #1215

AABC Commissioning Group

hereby certifies that

Kourush Afsharjavan, P.E., LEED AP, CxA

Smart Building Strategies, LLC

has met all prerequisites demonstrating independence and the technical, management, and communications skills required to implement the commissioning process in new and existing buildings, and passed the necessary examination to be awarded this certificate in recognition of their qualifications as an ACG

Certified Commissioning Authority

Registration number: 1012-1085 . This certificate, valid only for the year 2022, is renewable on an annual basis upon meeting all requirements noted in the CxA Candidate Handbook.

CERTIFIED COMMISSIONING AUTHORITY — acg AABC Commissioning Group — CxA

Justin F. Garner, P.E., CxA
Certification Council Chair

Ray Bert
ACG Executive Director

Better Buildings U.S. DEPARTMENT OF ENERGY
RECOGNIZED PROGRAM
MEETS U.S. DEPARTMENT OF ENERGY GUIDELINES

ANSI ACCREDITED
ISO/IEC 17024
Personnel Certification
Program #1215

Annual Membership Certificate

awarded to

Smart Building Strategies, LLC

As a member in good standing of the
Energy Management Association for the year

2022

This member has met all requirements for membership
and is entitled to all rights and privileges of
EMA Corporate Membership. This certificate is renewable
on an annual basis and expires December 31, 2022.

Anna Kosova, *Executive Director*

ENERGY MANAGEMENT ASSOCIATION

Chris Smith, CxA, EMP, *EMA President*

ENERGY MANAGEMENT ASSOCIATION

hereby certifies that

Vahid Kompany, P.E., LEED AP, CxA, EMP

Smart Building Strategies, LLC

has demonstrated the technical, managerial, financial, and communications knowledge required to plan and implement energy management, and passed the necessary examination to be awarded this certificate in recognition of his qualifications as an EMA

Energy Management Professional (EMP)

This registration number 1012-E46 and this certificate, valid only for the year 2022, are renewable on an annual basis upon meeting all requirements for maintaining EMP certification.

E M P
ENERGY MANAGEMENT PROFESSIONAL

Chris Smith, CxA, EMP, *EMA President*

Anna Kosova, *Executive Director*

Negotiations Summary

1. **Virginia Tech question:** As part of Virginia Tech standard procedures, all awarded contracts will be publicly posted on an online contracts portal. Is there any information included that would be used to identify or harm a person's identity, finances or personal information? If so, please provide a redacted copy of your proposal.

   Smart Building Strategies response: We had submitted a redacted copy of our proposal as part of our submission during the first phase of RFP to protect proprietary sections and info. SBS would like to submit an updated redacted copy to protect proposed personnel and individuals' identities.

2. **Virginia Tech question:** Are there any additional forms or documents that you will require to be incorporated into the contract documents? If so, please submit.

   Smart Building Strategies response: No additional documents.

3. **Virginia Tech question:** Does Smart Building Strategies agree to provide monthly invoices with payment due thirty (30) days after receipt of invoice or goods/services, whichever is later?

   Smart Building Strategies response: Yes, we agree.

4. **Virginia Tech question:** Do you agree that you will be performing services as an Independent Contractor, Company, Corporation or other business entity and are not an employee of Virginia Tech or any other Commonwealth Entity?

   Smart Building Strategies response: Yes, we agree.

5. **Virginia Tech question:** Do you further agree that Virginia Tech will not withhold any income taxes from its payments to contractors nor will it provide any employment benefits to the contractor or contractor's employees?

   Smart Building Strategies response: Yes, we agree.

6. **Virginia Tech question:** End of Contract Service Transition Expectations**:** If or when a transition of service to another provider is required (end of contract life or otherwise), the university would require the incumbent firm to cooperative fully in a successful transition of services. Explain any requirements your firm might have in preparing for such a transition of services. Additionally, please indicate your willingness to establish a transition plan alongside the new provider of service which may include but not be limited to sharing important data and/or existing service information via a cooperative knowledge transfer process.

   Smart Building Strategies response: SBS is fully committed to providing support for successful transition of services to another provider if required and we are willing to establish a transition plan for smooth transition. SBS is fully aware of requirement for sharing the project information and knowledge and will effectively cooperate in transferring this information to the new provider. Transition support services will be subject to our approved hourly rates. We also would like to keep confidentiality of

our preparatory information. Such information will be marked and identified as confidential.

7. **Virginia Tech question:** Do you agree that the initial contract period shall be two years?

   Smart Building Strategies response: Yes, we agree.

8. **Virginia Tech question:** Upon completion of the initial contract period, does Smart Building Strategies agree that the contract may be renewed by Virginia Tech upon written agreement of both parties for three (3) two-year periods, under the terms of the current contact?

   Smart Building Strategies response: Yes, we agree.

9. **Virginia Tech question:** If awarded a contract, do you agree to limit price increases to no more than the increase in the Consumer Price Index, CPI-W, All Items category for the latest twelve (12) months for which statistics are available at the time of renewal or 3 percent, whichever is less?

   Smart Building Strategies response: Yes, we agree.

10. **Virginia Tech question:** If awarded a contract, are you willing to hold prices firm for the initial contract period and the first renewal year?

    Smart Building Strategies response: We are offering to keep our hourly rates unchanged for the first two (2) years of this contract.

11. **Virginia Tech question:** Please identify the highest-level executive in your organization that is aware of this solicitation. Describe that person's commitment to assuring the highest quality service to Virginia Tech if your organization is awarded a contract.

    Smart Building Strategies response: SBS makes a conscious commitment to provide consistent quality service to meet Virginia Tech's overall satisfaction on all assigned projects. This means meeting projects commissioning objectives while proactively working with the project team delivering the project on time. Vahid Kompany is the Director of Operations and partner at SBS. He will serve as the Program Manager for this contract. On every tasked assigned Vahid will communicate directly with Virginia Tech project manager and will monitor project status, progress, and outstanding issues so that problems can be avoided and quality of service can be ensured. He will actively communicate with Virginia Tech commissioning and energy management team to implement and integrate their recommendations into the project approach. He will always be in direct communication with task orders Lead Commissioning Authorities, as commissioning activities will be coordinated with them. This will provide a program/contract-wide unified line of communication between Virginia Tech and commissioning authority. This organizational structure allows for project objectives evaluations and recommendations while allowing for prompt corrective action.

12. **Virginia Tech question:** Will you be able to handle increased volumes of business and/or provide service to additional departments during the course of the contract?

    Smart Building Strategies response: Yes. We have proven record of successfully performing and managing various ongoing and diversely located projects simultaneously locally and nationwide. We accomplish this by proper management, efficient communication, effective task planning, execution, and responsive schedule controls. We also ensure assignment of knowledgeable and technical capable individuals to all task orders to maintain the level of competency, expertise, experience, and the quality of services on all projects and throughout of projects duration.

13. **Virginia Tech question:** Please provide your best schedule of prices for all services offered.

    Smart Building Strategies response: Below table provides our offered price schedule for initial two years.

Proposed Labor Categories and Hourly Rates for initial Two Years

Labor Category	2022-23	2023-24
Program Director	N/A	N/A
Energy Engineer/Senior Commissioning Authority/Project Manager	$149.52	$149.52
Project Engineer/ Commissioning Authority	$124.28	$124.28
Field Engineer/ Commissioning Technician	$96.24	$96.24
Administrative Assistant	$65.28	$65.28

14. **Virginia Tech question:** How soon after contract award can you begin providing services?

    Smart Building Strategies response: Immediately. We stand ready to work with Virginia Tech towards achieving their commissioning and energy saving goals.

15. **Virginia Tech question:** Are you registered with and willing to participate in the eVA internet procurement solution described in the terms and conditions of the RFP?

    Smart Building Strategies response: Yes. SBS is currently registered with eVA.

16. **Virginia Tech question:** Do you acknowledge, agree and understand that Virginia Tech cannot guarantee a minimum amount of business if a contract is awarded to your company?

    Smart Building Strategies response: Yes, acknowledged.

17. **Virginia Tech question:** Are the prices for all goods/services listed in your proposal inclusive of all applicable eVA system transaction fees?

    Smart Building Strategies response: Yes.

18. **Virginia Tech question:** Does the vendor acknowledge, agree, and understand that the terms and conditions of the RFP # 952642206 shall govern the contract if a contract is awarded to your company?

    Smart Building Strategies response: Yes and acknowledged.

19. **Virginia Tech question:** For purposes of interacting with HokieMart, please identify the person (name, phone number, email address, etc.) in your company that will serve as liaison for a) e-commerce, b) accounts receivable, c) emergency orders.

    Smart Building Strategies response: Please submit all inquiries to:
    - Contract inquiries and all orders: [redacted]
    Director of Operations
    Phone: [redacted]
    Email: [redacted]
    Copy: [redacted]
    - E-commerce: [redacted]
    - Account Receivable: Phone: [redacted]
    - General inquiry Email box: [redacted]

20. **Virginia Tech question:** Are there any additional financial or value-added incentives you would like to offer at this time?

    Smart Building Strategies response: We would like to highlight few factors regarding our offered price schedule:
    - Rates are discounted from our published commercial rates
    - We will not utilize our highest labor category “Program Director” for task orders under this contract
    - Rates are applicable to ALL Virginia Tech’s facilities at all locations
    - Proposed rates are inclusive of all travel costs