

Manor Independent School District
Board of Trustees Board Meeting Agenda Item
January 22, 2024

CONSENT ITEM SHEET

RE: Consider and possible action regarding selection of professional service provider for proposed Testing and Balancing services for the HVAC system at New Transportation Facility, including possible delegation of authority to Superintendent and/or designee to negotiate and execute an agreement.

Supporting Documents:

1. *Qualifications for Proposed Professional*

District Goals:

FACILITIES & MAINTENANCE- By 2026, Manor ISD will proactively provide facilities to ensure 100% of scholars will have safe, well-maintained, environmentally sustainable, and community accessible facilities.

Bottom of Form

Background Information:

In heating, ventilation, and air conditioning (HVAC), testing, adjusting and balancing (TAB) are the three major steps used to achieve proper operation of heating, ventilation, and air conditioning systems. TAB refers to commercial building construction and the specialized contractors who employ personnel that perform this service. In general, the TAB specialist performs air and hydronic measurements on the HVAC systems and adjusts the flows as required to achieve optimum performance of the building environmental equipment.

As part of the District's project that have HVAC systems such as the New Transportation Facility, MISD will need to have a TAB specialist come and perform that work.

The TAB work shall be done under the direct supervision of a qualified engineer employed by the TAB professional firm. Because these services require an engineering license, it is a professional service. No formal procurement process is required under Texas law (*see* Texas Government Code Ch. 2254 "Professional Services Procurement Act" and Texas Educ. Code Section 44.031(f)). Under Texas Government Code Section 2254.003, the District may not select the professional based on price initially; instead, the professional is selected on the basis of demonstrated competence and qualifications to perform the services; and then a contract is negotiated for a fair and reasonable price.

Fiscal Implications:

As required by law for professional engineering services, the price will be negotiated with the selected professional following Board action.

Administrative Recommendation:

Administration recommends that the board approve the proposed professional as presented by Administration and delegate authority to the Superintendent to finalize an agreement in a form approved by legal counsel. Administration recommends that the Board select COMPLETE SYSTEM BALANCE, LLC based on their demonstrated competence and qualifications.

Proposed Motion Language:

"I move that the Board approve COMPLETE SYSTEM BALANCE, LLC for the HVAC Testing and Balancing services for the New Transportation Facility based on their demonstrated competence and qualifications as presented by Administration and further delegate authority to the Superintendent or his designee to negotiate and enter into an agreement for a fair and reasonable price."

Mr. Joe Mendez

Contact Person

Dr. Robert Sormani

Approved by Superintendent

Complete System Balance

Testing and Balancing of Air and Hydronic Systems

PO Box 399
Rockwall, Texas 75087
972-965-4289
www.completesystembalance.com

Cody Lee:

- **2007-Present:** President/ Manager of Complete System Balance
- **1998-2006:** Technician for Delta-T Inc., Dallas, Texas

- **2022-Present:** NEBB National Board Member & Chapter Affairs Chairman
- **2018 to Present:** NEBB Texas Board Member
- **2014 to Present:** NEBB Texas Technical Committee Chairman
- **2009:** Completed Testing to become a Certified Professional through the National Environmental Balancing Bureau (NEBB)
- **2016 to Present:** QCxP Qualified Commissioning Provider
- **2004:** Completed Testing to become a Certified Test and Balance Engineer through the AABC
- **2003:** Completed Testing to become a Certified Test and Balance Technician through the AABC
- **1996-1998:** Attended and graduated (Texas State Technical College) for Air Conditioning and Refrigeration Services; Waco, Texas

Ty Boyer:

- **2014 to 2018:** Project Manager for Air Engineering and Testing
- **2018-2022:** Project Manager for Campos Engineering
- **2020:** Passed Exam to become a NEBB Certified Technician
- **2022:** Passed Exam to become a NEBB Certified Professional
- **2022 to Present:** Certified Professional / Project Manager for Complete System Balance

Brady Allen:

- **2008 to Present:** Vice president of Operations
- **2001-2008:** Project Mgr and Certified Technician AABC for Delta T Inc.
- **2012:** Passed Exam to become a NEBB Certified Technician
- **2018 to Present:** QCxP Qualified Commissioning Provider

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Testing and Balancing of Air and Hydronic Systems

Wesley Maimone:

- **2010 to Present:** Technician for Complete System Balance.
- **2000-2008:** Technician for Delta T Inc.
- **2012:** Passed Exam to become a NEBB Certified Technician
- **2017 to Present:** QCxP Qualified Commissioning Provider

Robert Sepeda:

- **2000:** Graduated Universal Technical Institute
- **2000 to Present:** Been working in Test & Balance
- **2020:** Passed Exam to become a NEBB Certified Technician
- **2020 to Present:** QCxP Qualified Commissioning Provider

Justin White:

- **2012 to Present:** Been working in Test and Balance
- **2017:** Passed Exam to become a NEBB Certified Technician

Angel Lucas:

- **2019:** University of Texas Dallas – B. S. Mechanical Engineering
- **2020 to Present:** Been working in Test & Balance
- **2022:** Passed Exam to become a NEBB Certified Technician

Noah Babineau:

- **2021:** Graduated from Texas State Technical College
- **2022:** Passed Exam to become a NEBB Certified Technician

Justin Elijah:

- **2019:** Graduated from Georgia Southern - B.S. Mechanical Engineering
- **2022:** Passed Exam to become NEBB Certified Technician

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Testing and Balancing of Air and Hydronic Systems

Rodney Joseph:

- **2020:** Graduated from University of Louisiana Lafayette -B.S. Industrial Technology
- **2022:** Passed Exam to become NEBB Certified Technician

Garrett Marcantile:

- **2018:** Graduated from Austin College - B.S of Arts & Communications
- **2019:** Graduated Galveston College Associates in HVAC
- **2020-Present:** Test and Balance Trainee
- **2023:** Scheduled for NEBB Certified Tech Exam

Chris Taylor:

- **December 1, 2020** to the present Field Supervisor for Complete System Balance
- **January 7th, 2019 to August 1, 2020** Field Technician for Climatec Controls
- **February 3, 2014 to September 11, 2018** Dallas Branch- Division Manager for TAB Technologies
- **December 3, 1990 to January 23, 2014** Project Coordinator for Engineered Air Balance Company
- **2021** Re-certified as NEBB Certified Test and Balance Technician
- **2015 -2020** NEBB Certified Professional (Did not re-new Certification)
- **2014-2015** NEBB Certified Test and Balance Technician
- **2004-2014** AABC Certified Test and Balance Technician
- **1988 – 1990** Graduated with Associate of Applied Science from Texas State Technical College
- **1988** Certification in Geothermal HVAC Installation

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TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

Submittal

Contract Document Examination

Plan Review

We have examined the plans to ensure that all the dampers, valves, test ports, temp wells, and flow-control devices are shown on plans where we need them.

Submittal Review

Once we receive an approved submittal, we review it to ensure the design and submitted data match.

Project Record Document Review

We will review project record documents provided to Complete System Balance.

Control Drawing and Sequence Review

Once we are provided control drawings and sequences, we will review them ensuring they meet design intent.

Complete System Balance

TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

Submittal

Strategies & Procedures

Preparation

We complete readiness checks which shall consist of walking the job to verify the following

1. Permanent power is provided.
2. Hydronic systems are filled, clean, and free of air.
3. EMS is ready and working
4. Equipment & duct access doors are closed
5. All dampers are open
6. All Valves are open
7. Ceilings are installed 8. Windows and doors are shut.

Procedures for Air Balance

The procedures that we use for balancing is detailed in the **NEBB Procedural Standards &** and as called for in the specifications.

1. We prepare a take-off for the job, including the design information and rated information on the actual sheets that we use to record data.
2. We look through the "as built" drawings to match design/specified intent.
3. For variable air volume systems, we determine diversity. By looking through the VAVs or Fan powered boxes to find which ones to open and which ones to close to meet diversity.
4. We decide where to lay out traverse points to get the most accurate air volume readings. This shall be in a straight run of duct.
5. We check all airflow patterns on outside air dampers, louvers, as we shall also do with exhaust and mixed air.
6. We verify motor starters at each individual drive to ensure they have the proper size overloads. We also ensure that the VFDs are correctly properly.

Complete System Balance

TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

7. We move the branch dampers in order to get air to the desired path if need be.
8. We check for blockages in the ductwork. If we determine a blockage, we pinpoint it and let the mechanical company correct or remove the blockage.
9. We check condensate drains to make sure they are correctly piped, and the pipes are air-sloped adequately.
10. We check all ductwork to make sure it is sealed. This is also verified though our traverse points when we finalize the AHU.

Balancing Air Systems

We balance air systems using the ratio or the proportional balance method. This is detailed in the following reference material.

1. NEBB Procedural Standards
2. Environmental System Technology
3. AABC Technician Training Manual
4. Kahoe Field Manual

Procedures for Hydronic Systems

1. We prepare a take-off for the job, which shall include the design information and rated information on the actual sheets that we use to record data.
2. We look through the "as built" drawings to make sure that they match design/specified intent.
3. We prepare the hydronic system for balancing. This includes but is not limited to the following.
 - A. Make sure all manual valves are open both at the branch level and the coil level.
 - B. We check the expansion tank level if applicable.
 - C. We check flow control valves for specified sequence and set them to indicated flow.
 - D. We check makeup water to make sure we have enough water in the system.
 - E. We go to the highest point of the system to make sure there is an air bleed-off valve. Then we check to make sure all air is bled out of the system.

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TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

- F. We check to make sure the water is clean and properly flushed and that all strainers are clean.
- G. We check to make sure the pump is not running over maximum horsepower. If so, we cut back the discharge valve until the pump is under maximum horsepower.
- H. We set all automatic valves to 100% open.
- I. We check the pump impeller size by doing a block-off and comparing it to the pump curve.
- 4. We balance the system using the ratio or proportional balance method.
- 5. After all the coils are air balanced and the balancing valves air calibrated, we check the pump using the pump curve.
- 6. We report any flows that are not within the plus or minus 5 percent of design.

Procedures for Variable Flow Hydronic Systems

We balance systems with all three-way valves with the maximum flow going through the heat exchange terminal.

Balancing of Hydronic Systems

We balance hydronic systems using the ratio or the proportional balance method. This is detailed in the following reference material.

- 1. NEBB Procedural Standards
- 2. Environmental System Technology
- 3. AABC Technician Training Manual
- 4. Kahoe Field Manual

Tolerances

We balance all systems to within the tolerances called for in the specifications. If the system cannot obtain the tolerance, it is reported.

Complete System Balance

TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

References

Mike Clendenin
Professional Engineer
EMA Engineering and Consulting
903-521-5087

Gary Bristow
Professional Engineer
EMA Engineering and Consulting
903-581-2677

Scott Clendenin
Professional Engineer
EMA Engineering and Consulting
903-520-6338

Wes Jordan
Professional Engineer
Purtle & Associates an EMA Company
318-425-4501

Will Hill
Professional Engineer
EMA Engineering and Consulting
903-581-2677

Rick Romine
Professional Engineer
Romine, Romine, and Burgess Engineers
817-336-4633

Complete System Balance

TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

Leonard Stephens
Professional Engineer
Stephens Engineering
936-564-1474

Adam Rich
Executive Director Facility Services
Killeen ISD
254-290-5966

Floyd Kinkaid
Project Manager of Construction
McKinney ISD
469-302-4110

Tommy Osborne
Executive Director of Construction
Northwest ISD
817-215-0994

Terry Vandenburg
Mechanical/HVAC Department Head
Carrollton-Farmers Branch ISD
972-968-6100

Patrick Farr
Bond Manager for Community ISD
Mavery LLC
972-968-6100

More References available upon request.

Complete System Balance

TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

Below is a list of various districts/colleges that Complete System Balance has worked for or in:

Northwest Independent School District
Rockwall Independent School District
Tyler Independent School District
Castleberry ISD
Carrollton-Farmers Branch ISD
McKinney Independent School District
Community Independent School District
Royse City Independent School District
Sherman Independent School District
Nacogdoches ISD
Killeen Independent School District
Denton Independent School District
Lewisville Independent School District
Duncanville ISD
Dallas Independent School District
Fort Worth Independent School District
Brownsboro ISD
Jacksonville ISD
Quitman Independent School District
Pittsburg Independent School District
Princeton Independent School District
Longview Independent School District
Rusk Independent School District
Lancaster Independent School District
Alba-Golden ISD
Lindale Independent School District
Van Independent School District
Gorman Catholic School
Whitehouse Independent School District
Frankston Independent School District
Grand Prairie ISD
Tatum Independent School District
Troup Independent School District
Arlington Independent School District
Henderson Independent School District
Hust-Eueless-Bedford ISD
Needville Independent School District

Lucas Independent School District
Center Independent School District
Galena Park Independent School District
Fort Bend Independent School District
Lipan Independent School District
Bullard Independent School District
Wills-Point Independent School District
Lapoyner Independent School District
Irving Independent School District
Marshall Independent School District
Argyle Independent School District
Mexia Independent School District
Celina Independent School District
Prosper Independent School District
New Diana Independent School District
Alvin Independent School District
Birdville Independent School District
Coppell Independent School District
Quinlan Independent School District
Bonham Independent School District
Anna Independent School District
Melissa Independent School District
Cleburne Independent School District
Wylie Independent School District
Classical Academy Private Schools
Winona Independent School District
Burleson Independent School District
Woodville Independent School District
Redwater Independent School District
Hayes Independent School District
Crowley Independent School District
Gilmer Independent School District
Little Elm Independent School District
Alvarado Independent School District
Cedar Hill Independent School District
Aubrey Independent School District
Lufkin Independent School District

Sanger Independent School District
Highland Park ISD
DeSoto Independent School District
Gladewater ISD
Allen Independent School District
Arp Independent School District
Hallsville Independent School District
Carthage Independent School District

Texas A&M University
University of North Texas
Grayson College
Texas Womens University
Baylor University

Frost Independent School District
Pewitt Independent School District
Eustace Independent School District
Decatur Independent School District
Pottsboro Independent School District
Pflugerville Independent School District
Mineola Independent School District
Godley Independent School District

McLennan Community College
Tyler Junior College
Kilgore College
University of Texas Tyler

Below is a list of General Contractors that Complete System Balance has worked directly for:

Balfour Beatty Construction
Pogue Construction
Jackson Construction
NorthStar Builders Group
Cadence McShane Construction
CORE Construction
Adolphson & Peterson Inc.
Joeris General Contractors
WRL General Contractors
RLM General Contractors
Gallagher Construction Services
Lee Lewis Construction
Lincoln Builders
Pearson Construction

Buford Thompson Construction (BTC)
Garrett & Associates
American Constructors
Berry & Clay Construction
Crossland Construction
JPJ Construction
Heritage Constructors
Rogers-O'Brien Construction
HGR General Contractors
Cloud Construction
Mazanec Construction
Steele & Freeman Inc
Plyler Construction

Complete System Balance

TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

More projects available upon request

Project Name: Community High School

Location: Nevada, TX

Client Name: Community Independent School District

Firm's Role: Complete System Balance was hired by the district to perform the Testing, Adjusting and Balancing in accordance to project specifications.

Test & Balance Budget: \$115,000.00

Test & Balance Start Date: 2/26/20

Test & Balance Completion Date: 1/13/21

Architect: WRA Architects

Engineer: Reed, Wells & Benson

Construction Manager: Pogue Construction

Complete System Balance

TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

Project Name: Prosper High School #2

Location: Prosper, TX

Client Name: Prosper Independent School District

Firm's Role: Complete System Balance was hired by the Construction Manager to perform the Testing, Adjusting and Balancing in accordance to project specifications.

Test & Balance Budget: \$185,000.00

Test & Balance Start Date: 10/14/19

Test & Balance Completion Date: 12/7/20

Architect: Huckabee Architects

Engineer: Romine, Romine & Burgess Mechanical and Electrical Engineers

Construction Manager: Pogue Construction

Complete System Balance

TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

Project Name: Highland Park High School Ph II and Ph III

Location: Dallas, TX

Client Name: Highland Park Independent School District

Firm's Role: Complete System Balance was hired by the Construction Manager to perform the Testing, Adjusting and Balancing in accordance to project specifications.

Test & Balance Budget: \$77,000.00

Test & Balance Start Date: 4/27/20

Test & Balance Completion Date: Phased project which is still in construction

Architect: Stantec Architects

Engineer: EMA Engineering and Consulting

Construction Manager: Lee Lewis Construction

Complete System Balance

TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

Project Name: Hyer Elementary School

Location: Dallas, TX

Client Name: Highland Park Independent School District

Firm's Role: Complete System Balance was hired by the Construction Manager to perform the Testing, Adjusting and Balancing in accordance to project specifications.

Test & Balance Budget: \$52,000.00

Test & Balance Start Date: 8/22/20

Test & Balance Completion Date: 7/30/21

Architect: Stantec Architects

Engineer: Stantec Engineering

Construction Manager: Balfour Beatty Construction

Complete System Balance

TESTING AND BALANCING OF AIR AND HYDRONIC SYSTEMS

Project Name: New Sherman High School

Location: Sherman, TX

Client Name: Sherman Independent School District

Firm's Role: Complete System Balance was hired by the district to perform the Testing, Adjusting and Balancing in accordance to project specifications.

Test & Balance Budget: \$189,000.00

Test & Balance Start Date: 1/18/21

Test & Balance Completion Date: 1/1/22.

Architect: VLK Architects

Engineer: Reed, Wells & Benson

Construction Manager: Cadence McShane Construction



Firm Certification

Complete System Balance

HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED
STATUS IN THE FOLLOWING DISCIPLINE

Testing, Adjusting and Balancing of Environmental Systems

3451

NEBB Certification Number

March 31, 2024

Expiration Date




NEBB President


NEBB President-Elect



Certification

Cody Lee

HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED PROFESSIONAL
STATUS IN THE FOLLOWING DISCIPLINE

Testing, Adjusting and Balancing of Environmental Systems

This Certificate, as well as individual affiliation with a NEBB Certified Firm and associated NEBB Certification Stamp are REQUIRED to provide a NEBB Certified Report. Participation in the NEBB Quality Assurance Program requires the Certificant be affiliated with a NEBB Certified Firm.

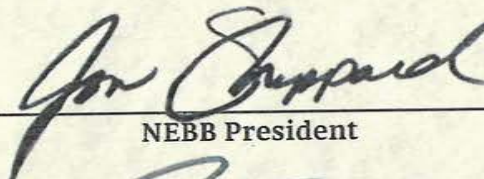
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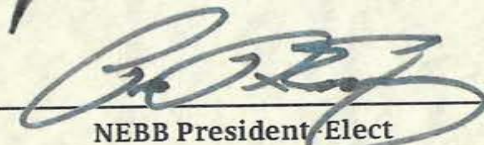
NEBB Certification Number

March 31, 2024

Expiration Date




NEBB President


NEBB President Elect



Certification

ANDREW TY BOYER

**HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED PROFESSIONAL
STATUS IN THE FOLLOWING DISCIPLINE**

Testing, Adjusting and Balancing of Environmental Systems

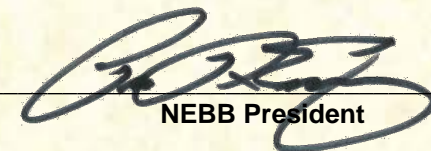
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CP-24428

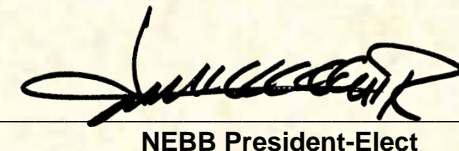
NEBB Certification Number

December 31, 2023

Expiration Date



NEBB President



NEBB President-Elect



Certification

Brady Allen

**HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED TECHNICIAN
STATUS IN THE FOLLOWING DISCIPLINE**

Testing, Adjusting and Balancing of Environmental Systems

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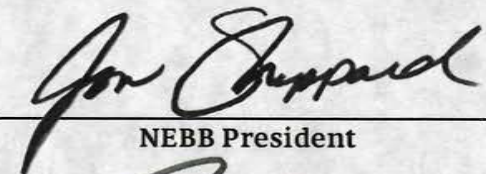
CT-21301

NEBB Certification Number

March 31, 2024

Expiration Date




NEBB President


NEBB President Elect



Certification

Wesley Maimone

**HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED TECHNICIAN
STATUS IN THE FOLLOWING DISCIPLINE**

Testing, Adjusting and Balancing of Environmental Systems

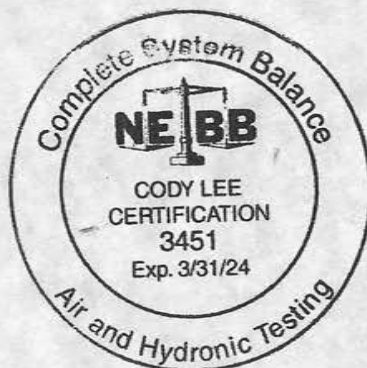
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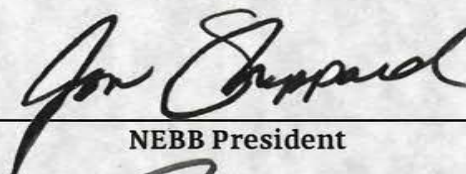
CT-21300


NEBB Certification Number

March 31, 2024

Expiration Date




NEBB President


NEBB President Elect



Certification

Justin D. White

**HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED TECHNICIAN
STATUS IN THE FOLLOWING DISCIPLINE**

Testing, Adjusting and Balancing of Environmental Systems

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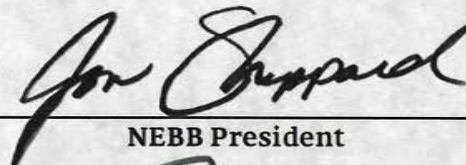
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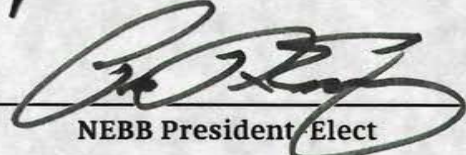
NEBB Certification Number

March 31, 2024

Expiration Date




NEBB President


NEBB President Elect



Certification

Christopher J. Taylor

**HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED TECHNICIAN
STATUS IN THE FOLLOWING DISCIPLINE**

Testing, Adjusting and Balancing of Environmental Systems

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CT-22267

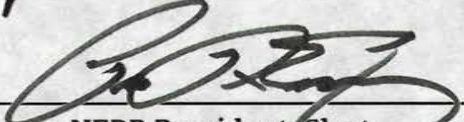
NEBB Certification Number

March 31, 2024

Expiration Date




NEBB President


NEBB President Elect



Certification

Robert Sepeda

**HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED TECHNICIAN
STATUS IN THE FOLLOWING DISCIPLINE**

Testing, Adjusting and Balancing of Environmental Systems

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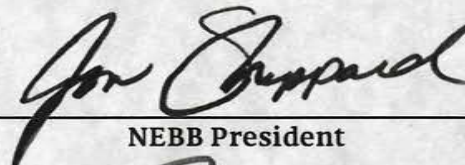
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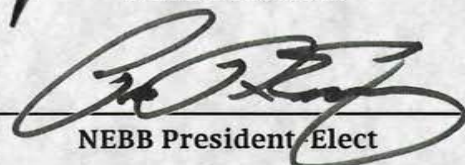
NEBB Certification Number

March 31, 2024

Expiration Date




NEBB President


NEBB President Elect



Certification

Noah Wilson Babineau

**HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED TECHNICIAN
STATUS IN THE FOLLOWING DISCIPLINE**

Testing, Adjusting and Balancing of Environmental Systems

This Certificate, as well as individual affiliation with a NEBB Certified Firm and associated NEBB Certification Stamp are REQUIRED to provide a NEBB Certified Report. Participation in the NEBB Quality Assurance Program requires the Certificant be affiliated with a NEBB Certified Firm.


CT-22348


NEBB Certification Number

March 31, 2024

Expiration Date




NEBB President


NEBB President Elect



Certification

Angel Alexander Lucas

**HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED TECHNICIAN
STATUS IN THE FOLLOWING DISCIPLINE**

Testing, Adjusting and Balancing of Environmental Systems

This Certificate, as well as individual affiliation with a NEBB Certified Firm and associated NEBB Certification Stamp are REQUIRED to provide a NEBB Certified Report. Participation in the NEBB Quality Assurance Program requires the Certificant be affiliated with a NEBB Certified Firm.


CT-22351

NEBB Certification Number

March 31, 2024

Expiration Date




NEBB President


NEBB President Elect



Certification

Justin Devon Elijah

**HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED TECHNICIAN
STATUS IN THE FOLLOWING DISCIPLINE**

Testing, Adjusting and Balancing of Environmental Systems

This Certificate, as well as individual affiliation with a NEBB Certified Firm and associated NEBB Certification Stamp are REQUIRED to provide a NEBB Certified Report. Participation in the NEBB Quality Assurance Program requires the Certificant be affiliated with a NEBB Certified Firm.


CT-22417


NEBB Certification Number

December 31, 2022

Expiration Date




NEBB President


NEBB President Elect



Certification

Rodney Joseph, Jr.

**HAS MET ALL REQUIREMENTS FOR NEBB CERTIFIED TECHNICIAN
STATUS IN THE FOLLOWING DISCIPLINE**

Testing, Adjusting and Balancing of Environmental Systems

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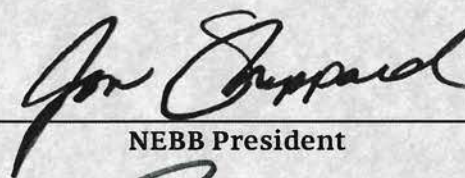
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NEBB Certification Number

December 31, 2022

Expiration Date




NEBB President


NEBB President Elect



WISCONSIN
UNIVERSITY OF WISCONSIN-MADISON

*The College of Engineering and
Interdisciplinary Professional Programs proudly present to*

Cody Lee

*this certificate for successfully completing all of the requirements for
Certification as Accredited*

Qualified Commissioning Process Provider

with the designation of

QCP or QCxP

valid until

December 31, 2027

Edward G. Borbely, Chair of the Certification Committee

Joy E. Altwies, Committee Member

Ian McIntosh, Committee Member



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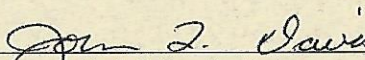
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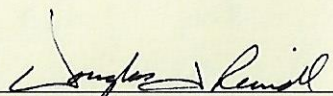
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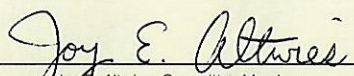
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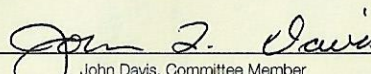
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