



# *GSA Advantage!* Price Catalog

OFFERED BY: MCKINSTRY ESSENTION, INC.  
CONTRACT NUMBER: GS-21F-0140V  
CONTRACT PERIOD: 10 SEPT 2014 – 2019



**SINS OFFERED:** 003 01 Smart Buildings Systems Integrator | 003 97 Ancillary Repair and Alterations | 871 100 Ancillary Supplies and/or Services | 871 202 Energy Management Planning and Strategies | 871 203 Training on Energy Management | 871 204 Metering Services | 871 205 Energy Program Support Services | 871 206 Building Commissioning Services | 871 207 Energy Audit Services | 871 208 Resource Efficiency Management | 871 209 Innovations in Energy | 871 210 Water Conservation | 871 211 Energy Consulting Services | 871 299 Introduction to New Services

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FOR THE LIFE OF YOUR BUILDING

# Company Profile

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## ENERGY-RELATED EXECUTIVE ORDERS

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McKinstry provides solutions to meet your needs, in all facets of the key Executive Orders:

- Energy Policy Act of 2005—EPA Act
- Energy Independence and Security Act of 2007-EISA (Dec. 2007)
- Executive Order (E.O.) 13423, Strengthening Federal Environmental, Energy, and Transportation Management (Jan. 2007)
- Executive Order (E.O.) 13514; Federal Leadership in Environmental, Energy, and Economic Performance; (2009)

## For the Life of Your Building

The Federal Government is the largest consumer of energy in the world, spending over \$8 billion annually. Executive Orders have continued to shape the direction of how government, as an owner and operator of real estate, acts as a leader in energy and greenhouse gas reductions. At McKinstry, we have spent 50 years developing and refining design-build engineering solutions and advanced tools and technologies that enable our clients to design, build, operate, maintain and optimize their real estate holdings *For the Life of Your Building*.

The Federal Government truly is an owner for the life of an asset and a leader in shaping the commercial real estate marketplace when it comes to advancing strategies for reducing energy and greenhouse gas emissions. Recognizing that you face ever-increasing Administration and Congressional goals, we help remove the burden of meeting these demands, assisting you to:

- Reduce energy consumption by 30% over the 2003 baseline by 2015
- Track/report/perform comprehensive energy and water evaluations on 25% of covered facilities each year, so that you meet the requirement to audit each facility once every four years
- Produce annual reports to Congress on the Agency's progress
- Measure, report, and reduce your greenhouse gas emissions from direct and indirect activities
- Certify and track compliance with EISA through the DOE web reporting tool and into ENERGY STAR® Portfolio Manager
- Place advanced metering on all Federal buildings for electrical service by 2012
- Have metering in place for natural gas and steam by 2016
- Enable you to reduce potable water consumption by 16% by 2015 and increase that reduction to 26% by 2020
- Reduce your industrial and landscaping water consumption by 20% by 2020
- Ensure that 50% of all renewable energy comes from renewable sources developed after 1999
- Ensure 7.5% of all electricity consumed comes from renewable sources by 2013 (and each year thereafter)
- Implement programs that ensure full Operations & Maintenance plans are in place, including periodic commissioning and Measurement & Verification of energy and water savings

Our ability to understand the demands and requirements placed on you, to shape



# Company Profile



McKinstry's Cycle of Services

solutions that help drive accountability and transparency in reporting, and to provide renewable energy strategies, while continuing to optimize the performance of existing systems helps you meet these pressing (and growing) mandates. We do this while leveraging the capital markets through performance contracting (we understand there is no endless bucket of funding to draw from). At McKinstry, when we work with a client, we join their team... and they join ours. Through questions and answers, give and take, and thorough discussions of what's possible, we arrive at solutions together.

Our *Cycle of Services* creates a continuum of expertise and assistance that you can access at any point in the life of your facilities. And because each service is related to the others, the entire cycle is strengthened with every project as new insights, knowledge, and data lead to increasingly positive outcomes. Our staff is trained across multiple disciplines, so no matter how your needs may change, we're always ready with the appropriate expertise. McKinstry combines extensive industry experience with the latest internet technologies to provide:

- Innovative web-based building and facility management solutions
- Energy auditing and performance contracting services
- Commissioning
- Resource efficiency and management
- Active energy metering and management
- Total cost of ownership analysis
- Transition to sustainable operations
- Sustainability consulting
- Renewable energy solutions

Since our founding in 1960, we have grown to provide a full spectrum of services that result in well designed, easy-to-maintain buildings that work at peak levels of performance, both operationally and financially. McKinstry is a one-stop resource for our clients' engineering, construction, operations, maintenance, and management needs. By excelling in every aspect of vertically integrated delivery, we drive waste, cost, time, and redundancy out of the design/build process... and help every building run efficiently over its entire lifetime.

At McKinstry, we do everything we can to make sure that our first project's successful conclusion is only the beginning of a long-term partnership with you. We take responsibility for your facilities' optimum performance and strive to be there *For the Life of Your Building.*

# Office Locations

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## Seattle

### CORPORATE OFFICE

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This office can only receive FedEx deliveries (no US mail).

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## Tri-Cities

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# Using the GSA Schedules

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GSA's streamlined ordering procedures have reduced the tedious, time-consuming government procurement process to a few simple steps. GSA has done this by prequalifying vendors to perform a range of services. GSA has reviewed vendor qualifications, capabilities and cost schedules in advance of the need for services, and identified these vendors, by type of service, on its *GSA Advantage!*<sup>™</sup> website. For McKinstry Essention, LLC. (also referred to as *McKinstry*) refer to Contract Number: **GS-21F-0140V**. This approval is valid for all organizations in the federal government and other governmental agencies, and the entire process—from identifying the Statement of Work (SOW) to having a contractor on board—can be completed in as few as three weeks.

To initiate the process, provide your contracting officer (CO) with a SOW. Your CO will issue your SOW to three approved GSA Schedule vendors, or the appropriate schedule and Special Item Number (SIN), which align with your requirements need. You and your CO then review the vendors' responses, and select the "best value" contractor. Once you have selected your "best value" provider, a contract order is issued directly to the selected contractor. GSA has put the process in place, and will assist you, if needed, but does not get involved in your procurement process.

## Who Can Use the Schedule?

In accordance with GSA Order ADM 4800.2F the following agencies and organizations are eligible to use the GSA Schedule. The lists are not intended to be all-inclusive, so please refer to the GSA Order for additional information or contact a GSA Schedule Contracting Officer.

- All Federal agencies and activities in the executive, legislative, and judicial branches;
- Government contractors authorized in writing by a Federal agency pursuant to CFR 51. 1;
- Mixed ownership government corporations (as defined in the Government Corporation Control Act);
- The government of the District of Columbia; and,
- Other activities and organizations authorized by statute or regulation to use GSA as a source of supply. See links below for full listing.

## SCOPE

Orders placed pursuant to a Multiple Award Schedule (MAS), using the procedures in FAR 8.404, are considered to be issued pursuant to full and open competition. Therefore, when placing orders under Federal Supply Schedules, ordering offices need not seek further competition, synopsize the requirement, make a separate determination of fair and reasonable pricing, or consider small business set-asides in accordance with Subpart 19.5. GSA has already determined the prices of items under Schedule contracts to be fair and reasonable. By placing an order against a Schedule using the procedures outlined below, the ordering office has concluded that the order represents the best value and results in the lowest overall cost

# Using the GSA Schedules

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alternative (considering price, special features, administrative costs, etc.) to meet the Government's needs.

Services under Schedule 03 Facilities Maintenance and Management Services apply to all Federal agencies, both civilian and Defense. The prices, terms and conditions stated under the associated SINS apply exclusively to that particular Schedule of services. An adjusted rate may be required for services to be performed in the geographic areas outside the continental United States.

## Ordering Procedures for Facilities Maintenance & Management Services Priced at Hourly Rates

The GSA has determined that the rates for Facilities Maintenance and Management Services contained in this price list are fair and reasonable. However, the ordering office using this contract is responsible for considering the level of effort and mix of labor proposed to perform a specific task being ordered and for making a determination that the total firm fixed price or ceiling price is fair and reasonable. In accordance with the Federal Acquisition Streamlining Act of 1994 and the Federal Acquisition Reform Act of 1996, GSA's streamlined ordering procedures have reduced the government procurement process to a few simple steps. While the Federal Acquisition Service Schedule program already has determined these rates to be fair and reasonable, ordering offices must determine that the total price is reasonable for the specific tasks required by the agency. Based on quotes requested from three contractors that appear to offer the best value (considering scope of services offered, hourly rates, contractor's locations, technical capabilities and other factors, as appropriate), the ordering agency selects the one that best meets its needs.

This contract is available to all federal agencies for domestic and overseas use. Executive agencies, other federal agencies, mixed-ownership government corporations, and the District of Columbia; government contractors authorized in writing by a federal agency pursuant to FAR Part 51; and other activities and organizations authorized by statute or regulation to use GSA as a source of supply may use this contract. Additionally, contractors are encouraged to accept orders received from activities within the executive branch of the federal government. GSA Order ADM 4800.2F provides a complete list of authorized schedule users.

Total price for services are established at the time the task order is placed and are based on the rates offered in the McKinstry catalog. The resultant task order details the estimated number of hours, the labor categories to be provided, and any related items. If the ordering agency's contracting officer chooses to purchase services on a labor-hour-time-and-material basis, the resultant task order will specify the not-to-exceed price, the labor categories proposed (with the hourly rates for each), and any applicable travel and other direct costs. Federal Acquisition Regulation 8.4 provides procedures for the acquisition of services using GSA schedule contracts.

# Using the GSA Schedules

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## How to Place an Order

### **STEP 1. DEVELOP A STATEMENT OF WORK (SOW)**

In the SOW, include the following information:

- Work to be performed,
- Location of work,
- Period of performance;
- Deliverable schedule, and
- Special standards and any special requirements, where applicable.

### **STEP 2. SELECT CONTRACTOR AND PLACE ORDER**

- If the order is at or below the micro-purchase threshold, select the contractor best suited for your needs and place the order.
- If the order is exceeding but less than the maximum order threshold (MOT), prepare an RFQ;
- If the order is in excess of the MOT, prepare an RFQ. Consider expansion of competition and seek price reductions.

### **STEP 3. PREPARE A REQUEST FOR QUOTE (RFQ)**

- Include the SOW and evaluation criteria;
- Request fixed price, ceiling price, or, if not possible, labor hour or time and materials order;
- If preferred, request a performance plan from contractors and information on past experience; and include information on the basis for selection.
- May be posted on GSA's electronic RFQ system, *e-Buy*.

### **STEP 4. PROVIDE RFQ TO AT LEAST THREE CONTRACTORS**

### **STEP 5. EVALUATE OFFERS, SELECT BEST VALUE CONTRACTOR, AND PLACE ORDER**

# Blanket Purchase Agreements

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## Blanket Purchase Agreements (BPAs)

Ordering activities may establish BPAs under any GSA schedule contract. A GSA schedule BPA simplifies the filling of recurring needs for supplies or services, while leveraging a customer's buying power by taking advantage of quantity discounts, thus saving administrative time and reducing paperwork.

BPAs are established in accordance with the procedures in Federal Acquisition Regulation Part 8.405-3. An ordering activity may request a price reduction based on the total estimated volume of the BPA, regardless of the size of individual orders. BPAs may be established with one or more scheduled contractors at the discretion of the ordering activity. When establishing multiple BPAs, the ordering activity must specify the procedures for placing orders under the BPAs. A GSA schedule BPA should not exceed five years in length, but may do so to meet program requirements. A BPA may extend beyond the current term of its GSA schedule contract, so long as there are option periods in the GSA schedule contract that, if exercised, will cover the BPA's period of performance.

## How to Order From a BPA

Information contained on page 38 will assist ordering agency offices understand how to utilize BPAs under the GSA Federal Supply Schedule contracts. BPAs are a simplified method of filling anticipated repetitive needs for services and products. BPAs are *charge accounts* that ordering offices establish with GSA Schedule contractors to provide themselves with an easy ordering tool. In accordance with Federal Acquisition Regulation (FAR) 8.404, ordering offices may establish BPAs under any GSA Schedule contract.

### SINGLE BPA

Generally, a single BPA should be established when the ordering office can define the tasks to be ordered under the BPA and establish a firm fixed price or ceiling price for individual tasks or services to be ordered. When this occurs, authorized users may place the order directly under the established BPA when the need for service arises. The Schedule Contractor who represents the best value and results in the lowest overall cost alternative to meet the agency's needs should be awarded the BPA.

### MULTIPLE BPAS

When the ordering office determines multiple BPAs are needed to meet its requirements, the ordering office should determine which contractors can meet any technical qualifications before establishing the BPAs. When multiple BPAs are established, the authorized users must follow the procedures outlined under **STEP 2** in How to Place an Order, above, and then place the order with the Schedule Contractor who represents the best value and results in the lowest overall cost alternative to meet the agency's needs.

# Blanket Purchase Agreements

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Ordering offices review BPAs periodically. Such reviews are recommended to occur at least annually. The purpose of the review is to determine whether the BPA still represents the best value (considering price, special qualifications, etc.) and results in the lowest overall cost alternative to meet the agency's needs.

BPAs do not extend beyond the end of the contract period; all services and deliveries are made and the contract terms and conditions continue in effect until the completion of the order. Orders for tasks that extend beyond the fiscal year for which funds are available include Federal Acquisition Regulation (FAR) 52.232-19 Availability of Funds for the Next Fiscal Year. The purchase order specifies the availability of funds and the period for which funds are available.

The ordering office should give preference to small business concerns when two or more contractors can provide the services at the same firm fixed price or ceiling price.

When the ordering office's requirement involves products as well as Facilities Maintenance and Management Services, the ordering office should total the prices for the products and the firm fixed price for the services, and select the Schedule Contractor that represents the greatest value in terms of meeting the agency's total needs.

The ordering office should, at a minimum, document orders by identifying McKinstry Essention, LLC. as the source from which the services were purchased, and listing the services purchased and the amount paid. If other than a firm, fixed-price order is placed, such documentation should include the basis for the determination to use a labor-hour, or time-and-materials order. For agency requirements in excess of the micro purchase threshold, the order file should document the evaluation of Schedule Contractors' proposals that formed the basis for selecting the Schedule Contractor that received the order and the rationale for any trade-offs made in making the selection.

# Special Item Number (SIN) Services

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## SIN 871 100

### ANCILLARY SUPPLIES AND/OR SERVICES, RELATING TO ENERGY MANAGEMENT, WATER CONSERVATION AND SUPPORT SERVICES

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*Ancillary supplies and/or services are support supplies and/or services which are not within the scope of any other SIN on this schedule. These supplies and/or services are necessary to compliment a contractor's offerings to provide a solution to a customer requirement. This SIN may be used for orders and blanket purchase agreements that involve work or a project that is solely associated with the supplies and/or services purchased under this schedule. This SIN EXCLUDES purchases that are exclusively for supplies and/or services already available under another schedule.*

*Special Instructions: The work performed under this SIN shall be associated with existing SIN(s) that are part of this schedule. Ancillary supplies and/or services shall not be the primary purpose of the work ordered, but be an integral part of the total solution offered.*

*Ancillary supplies and/or services may only be ordered in conjunction with or in support of supplies or services purchased under another SIN(s) of the same schedule. Offerors may be required to provide additional information to support a determination that their proposed ancillary supplies and/or services are commercially offered in support of one or more SIN(s) under this schedule.*

McKinstry provides Ancillary Supplies and/or Services as needed in support of other SINs relating to energy management, water conservation, and support services. Our team of well-trained technicians can fully perform all aspects of maintenance, repair and restoration services to all facets of building operating systems and are backed by the full support of all business lines within the McKinstry family of operations, such as our design-build mechanical and electrical engineers. McKinstry energy and facility services professionals are prepared to assist in sourcing the best value supplies in support of SINs available through this catalog.

# Special Item Number (SIN) Services

## SIN 871 202

### ENERGY MANAGEMENT PLANNING AND STRATEGIES

*A Comprehensive Energy Management Solution consisting of all four phases of an energy project and could pertain to a variety of energy projects that include, but are not limited to, renewable energy, sustainable energy, and energy efficient buildings certification programs such as LEED.*

- **Consulting/Auditing/Energy Management Solutions**—This includes the strategic planning, energy assessments e.g. feasibility, vulnerability and other detailed assessments, developing and executing of energy audits, audit plans and energy management solutions.
- **Concept Development and Requirements Analysis**—This includes the analysis of the audit results and outlined requirements to design a detailed energy management project concept.
- **Implementation and Change Management**—This includes the implementation and integration of more energy efficient practices and systems and training in using them effectively.
- **Measurement and Verification**—This includes the performance assessment and measurement of the effectiveness and energy efficiency of the project and can include long term monitoring, verification of savings and benchmarking.

### APPROACH

McKinstry is committed to providing excellence in the design, construction and operation of our customers' facilities by continually striving to develop innovative, cost-effective facility solutions. With our many years of experience, McKinstry has audited over 1,500 facilities and currently we are evaluating, implementing, or commissioning more than 415 buildings in excess of 35 million square feet with more than 100 clients.

#### *Energy Auditing*

Our engineering-based approach to auditing, coupled with extensive site investigations and interviews, generates projects that meet financial, facility, and operation objectives.

#### *Building Modeling/Building Design/Cost Estimating Phase*

McKinstry utilizes a Total Cost of Ownership (TCO) model throughout development to evaluate LEED® options and optimal design scenarios. TCO aids in design and construction choices that optimize the present value of all costs incurred and all of the value delivered over the life of a facility asset.

#### *Performance Guarantee / Monitoring and Verification*

McKinstry guarantees up to 100% of energy savings on applicable scopes of work. We provide staff training and proper commissioning of systems to ensure savings

McKinstry projects have eliminated **260,000** metric tons of CO<sub>2</sub> emissions in the past five years, which equates to planting **15.6 million** trees or removing over **47,000** cars from local highways



# Special Item Number (SIN) Services

## CASE STUDY 871 202: WASHINGTON STATE UNIVERSITY

After being selected as Washington State University's (WSU) ESCO partner under a master ESPC contract, McKinstry completed a comprehensive energy audit of 20 campus facilities, and has delivered multiple major infrastructure and energy saving projects in the past several years, including: lighting upgrades in approximately 4,000,000 square feet of space, installation of two 1,400 ton chillers and associated cooling towers, campus loop CHW piping modifications, two boiler replacement projects, replacement of a large fan system, installation of two large cooling towers to improve performance of central plant chillers, chilled water system cleaning modifications, new construction of the biotechnology and life sciences building.

### PROJECT COST

\$45 million

### RESULTS

To date, McKinstry projects have combined annual utility savings of over \$600,000. This equates to a 7.5 year payback and an ROI of 3.3%.



are achieved. We develop a measure-specific performance assurance program to validate that optimal system performance is maintained.

### *Financing*

McKinstry is a financially strong company—we can directly secure funding for large ESPC projects or partner with third party financial institutions to arrange optimum finding. We have access to multiple lending partners—from those that specialize in green lending to more traditional lending—utilizing our McKinstry Capital group to facilitate the implementation of master purchase agreements.

### *Construction Management*

McKinstry serves as the Prime Contractor, responsible for all facets of successful project delivery and execution.

### *Commissioning*

Our start-up, self-performance competency includes system balancing, control system testing, and digital archiving of building design and performance data, all focused on operational stability.

### *Training*

A well-trained and developed facilities staff has a direct impact on achieving annual (and continued) savings, maintaining occupant thermal comfort, and extending equipment life. McKinstry takes our customers' team through an extensive training program presented by a consortium of subcontractors, engineers, and suppliers, and documents the training for later review.

### *Operations and Maintenance*

McKinstry develops an engineered maintenance plan that lists the various service tasks and frequency for all of the applicable system components. This comprehensive approach helps our customers to optimize system performance and life.

### *Measurement and Verification*

McKinstry provides complete monitoring services to assure projects meet performance requirements. Our dedicated measurement and verification team uses the latest remote monitoring technologies, data loggers, and web-based services to facilitate the flow of information to and from our clients. Our in-house remote monitoring center monitors control systems and uses the Department of Energy IPMVP as our best practice standard.

# Special Item Number (SIN) Services

## CASE STUDY 871 203: NORTHSHORE SCHOOL DISTRICT

McKinstry develops and manages standards for design, operation and maintenance of Northshore's facilities. We communicate maintenance and operational expectations to customers, and train, manage, and report performance of maintenance & operations personnel. We focus NSD's M&O teams on efficient processes and procedures.

### PROJECT COST

\$948,560

### RESULTS

All of the goals and deliverables contribute to better management, more effective decision making, greater energy efficiency, improved health and comfort, longer asset life and reliability, improved issue response and lower M&O cost, with greater visibility, accountability and transparency in the issue resolution process. This directly supports reducing energy consumption, mitigating risk with energy systems, operating systems efficiently, making energy efficient system choices, and achieving energy efficient building certification such as LEED®.



## RESULTS

McKinstry's projects provide a four-phase Comprehensive Energy Management Solution consisting of all four phases of an energy project pertaining to a variety of energy projects. Project-specific results include:

- Single point of accountability
- Master-planned, coordinated approach to energy management
- Increased occupant comfort and indoor air quality
- Improved lighting
- Measure-specific performance assurance
- Sustainability and renewable energy considered for every ECM

## SIN 871 203

### TRAINING ON ENERGY MANAGEMENT

*Provide training on energy management including, but not limited to, reducing energy consumption, mitigating risk with energy systems, operating systems efficiently, making energy efficient system choices, and energy efficient buildings certification programs such as LEED.*

McKinstry knows that proper training is a critical component to ensure that the goals of energy systems projects—including energy consumption reduction, risk mitigation, efficient systems operation, and LEED® certification, among others—are actually met. McKinstry provides a comprehensive training plan developed to fit the unique needs of our clients and specific projects. We design and deliver custom training programs to meet our clients' program goals. Training is part of an overall Transition Plan, focused on transferring all knowledge developed during the design & construction to appropriate client personnel through formal and informal activities. We advocate early involvement from all areas affected by the project—building operations, maintenance personnel, and other staff. We're not satisfied until our clients are 100% comfortable in the operations, maintenance, and emergency plans associated with their facilities.

### APPROACH

We have a documented process in place for archiving project and training information in an easily accessible manner. As part of our overall Transition Plan, a comprehensive training program parallels the construction close-out phase of the project to stabilized operation by client staff. This pathway consists of:

#### *On-Site Training*

Our extensive training program is presented by a consortium of subcontractors, engineers, and the equipment suppliers, all led by McKinstry. This training program is recorded in an archive format for future use.

# Special Item Number (SIN) Services

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## *Standard Operating Process and Procedures (SOP)*

We establish formal SOP's to include typical procedures for all building systems (i.e., mechanical, electrical, fire alarm, etc.) installed under the project. SOP outline includes normal, emergency, and maintenance procedures.

## *Operations & Maintenance Manuals*

We develop thorough Operations & Maintenance manuals detailing the specific equipment installed with information pertinent to the project. We include contact information for appropriate vendor representatives for all materials and equipment.

## *As-Built Documentation*

Developing detailed as-built drawings for all of the trades on each project, which are then combined into a comprehensive set of record drawings depicting the actual work completed. McKinstry also has experience in integrating 3-D Building Information Modeling (BIM).

## *Maintenance Planning and Strategy*

Providing instruction on proper maintenance plan and strategy. While operating the system is important, it is equally important to know how to maintain the building.

## *Warranty Management*

Creating a web-based warranty management database, associated with the equipment database. Terms and conditions of each warranty and associated vendors/contact information are tracked in InfoCentre.

## *Communication Protocols*

Establishing a communication protocol including procedures for event escalation, notification, response, documentation, and follow-up.

## *Emergency Planning*

Assisting the staff in designing any emergency response processes and procedures impacted by the project.

The archiving of this critical information is handled by McKinstry's InfoCentre, our web-based management system. Through this system, training and close-out documentation is converted to electronic format and placed on a secure network operated by McKinstry for client use.

## RESULTS

Our program results in well-trained facility staff, efficiently operating facilities, equipment operating as designed and optimizing utility usage through consistently meeting our goal of extending new and existing equipment life, ensuring proper operation and maintenance procedures are adequately performed, and empowering our customer's facility staff for the long-term.

# Special Item Number (SIN) Services

## CASE STUDY 871 204: GSA REGION 10 ADVANCED METERING

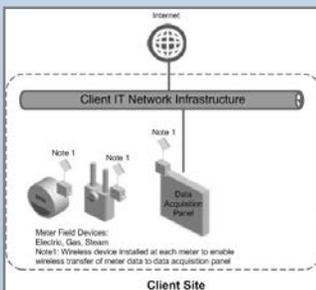
McKinstry set up advanced metering on water, gas, electrical, steam, and oil utilities for 34 Federal buildings in Alaska, Washington, Idaho, and Oregon to meet 2012 legislative requirements. After performing initial inspections, report submission and scope approval, McKinstry installed meters and created interfaces for new & existing meters. Data now streams to a central acquisition panel via hardwire or wireless technology, and is then sent to GSA's ION EEM energy management system. McKinstry self-performed all installation work, saving the GSA money by reducing mark-up costs on sub-contracts.

### PROJECT COST

\$1,461,943

### RESULTS

GSA can monitor and submit real time utility consumption information to Washington DC. They are able to monitor their utility usage locally, in real time, enabling them to proactively compare the data against their budgets before they receive their monthly bill.



## SIN 871 204

### METERING SERVICES

*Provide metering services including, but not limited to, the installation of metering equipment and software used for the collection of data and measurement of energy consumption through electric, gas, water or steam utilities, the utilization of data to ensure energy conservation goals are being met, and allows for the measurement and tracking of the cost effectiveness of energy technology investments. This could include basic metering services, advanced metering services, maintenance, installation, removal and disposal of new or existing equipment. Security clearances such as HSPD-12 may be required.*

### APPROACH

McKinstry provides metering services including, but not limited to, installing metering equipment and software used to collect data and measure energy consumption, applying the data to ensure energy conservation goals are met, and measuring and tracking cost-effectiveness of energy technology investments. Twenty-four hour remote monitoring is a specialty of McKinstry's. Via a modem, network connection, and building DDC controls we are able to monitor system operations, control temperatures, and foresee potential problems. Many adjustments to system operation such as temperature set points, schedules, and air volumes can be performed remotely, thus eliminating many emergency service calls. (See McKinstry's innovative Knowledge Response Center, SIN 871-299).

McKinstry has over \$280,000 of logging equipment to deploy on projects to gather field measurements and trend data. These tools include: electrical logging meters, light level meters, combustion efficiency testing equipment, HOBO micro data loggers, indoor air quality logging, ultrasonic meters, air flow measurement devices, water flow measurement devices, utility manager accounting software, Matrix utility accounting software, and a remote monitoring station staffed 24x7x365.

### RESULTS

McKinstry's proven results are accurate and proactive, providing:

#### *Efficient System Operations*

- Workflow process development/management
- Remote monitoring and operations
- Control system online support and service
- Central repository for all facility documentation – drawings, procedures, warranties, etc.

#### *Increased Occupant Satisfaction*

- 24x7x365 customer service and issue management
- Event scheduling and management facility communication conduit

# Special Item Number (SIN) Services

## CASE STUDY 871 205: UNIVERSITY OF MINNESOTA, MORRIS

The University of Minnesota Morris (UMM) had a goal of becoming the first carbon neutral University in the US. They chose McKinstry to analyze their campus, including evaluating campus energy demand, supply side options, and developing plans for an energy education & awareness system and for actively managing campus energy production, storage, and consumption. McKinstry's Carbon Management Tool was used to visually demonstrate the impacts and interactions between a multitude of conservation, energy storage, and supply side options.

### PROJECT COST

\$4.7 million

### RESULTS

The team identified a self-funding project with a 14-year payback, which not only resolved the campus' chilled water shortage, but also resulted in a reduction of their carbon emissions by more than 80%. At project completion, UMM will become net carbon negative. Projected annual savings are: 3,351,714 kWh, Sewer: 1,500 CCF, Water: 5,952 CCF, Steam: 19,335 klbs., totaling \$280,393.



- Real-time online issue status tracking and performance assurance

### *Significant Energy and Operational Savings*

- Facility benchmarking
- Key Performance indicator development and management
- Active energy management and analysis
- Facility asset management
- Facility business reporting

### *Reliable Workflow Management*

- Computerized maintenance management system
- Vendor/service provider management
- 24x7x365 active issue management
- Facility issues prioritization, dispatch and tracking

## SIN 871 205

### ENERGY PROGRAM SUPPORT SERVICES

*Provide energy program support services including, but not limited to, billing and management oversight and assistance in preparing energy services related agency statements of work. Energy efficient buildings certification programs such as LEED may be included.*

### APPROACH

McKinstry's energy program support services provide our customers a powerful energy and resource conservation focused solution for auditing, analyzing, and monitoring utility usage within and across our customers' facilities. We provide support services including, but not limited to, billing and management oversight and assistance in preparing energy services related agency statements of work. Our tailored approach for our customer's facility portfolio includes using and enhancing existing facility tools and technologies to take advantage of previous investments.

### RESULTS

The result—heightened utility expenditure accountability and conservation awareness.

- Verify utility bills for accuracy
- Review load profiles and bills for anomalies
- Prepare statements of work for energy management projects
- Identify possible low or no-cost capital expense projects

# Special Item Number (SIN) Services

## CASE STUDY 871 206: SEATTLE ART MUSEUM

Seattle Art Museum (SAM) hired McKinstry as their Building Commissioning Authority to provide technical consulting and testing related to design and construction, as well as to perform acceptance testing. SAM maintains an environment with incredibly high standards for temperature and humidity control, as well as reliability and energy efficiency, and required a consultant able to connect all of their new and existing equipment in order to ensure an efficient and operable building.

### PROJECT COST

\$717,000 (included 871-299 TSO services also)

### RESULTS

The commissioning team protected the museum's valuable art through a combination of experience and innovative research. They performed extensive air quality and humidity testing to ensure the proper environment for SAM's valuable assets, and followed up after construction to ensure the work met SAM's needs. The team provided operational plans, training, and air balancing to ensure the museum had a quality preventative maintenance program in place.



- Secure local utility incentives
- Establish a tracking system to provide a method for documenting savings
- Develop and manage Key Performance Indicators (benchmark)
- Track Energy Star scores, develop a plan to reach award levels, and provide professional engineering services to certify
- Provide processes, leadership, and support help for achieving LEED® certification
- Enhance or create operating guidelines for your facilities
- Train and educate owners and operators on high performance and energy efficient procedures

## SIN 871 206

### BUILDING COMMISSIONING SERVICES

*Provide building commission services including, but not limited to, comprehensive building commissioning services on new construction, major modernization projects, and existing energy consuming buildings and facilities designed to ensure the building systems are designed and built to operate as efficiently as possible. This includes re-commissioning and retro-commissioning services. Energy efficient buildings certification programs such as LEED may be included.*

### APPROACH

Dedication to quality exists within every facet of our organization. McKinstry takes a mechanical system approach that entails looking at each system in its entirety, which includes not only the controls, but their relationship to other systems on the job as well. Installing a system is only half the job; the other half is running every system through its paces to make sure that it performs as designed. McKinstry's business philosophy is built around a long-term focus rather than a short-term one and we proudly provide a *For the Life of Your Building* approach. Our start-up technology includes:

- NEBB Certified Air/Hydronic system balancing
- Control system inspection and testing
- Digital archiving of building design and performance
- Operational stabilization
- Training
- LEED® certification

# Special Item Number (SIN) Services

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## RESULTS

McKinstry has evaluated, implemented, and commissioned over 415 buildings, in excess of 35 million square feet with over 100 customers. These fully commissioned systems range from packaged rooftop units to large central steam and cooling plants to laboratory HVAC and pressurization control systems. Our commissioning service impacts other building systems, including security, electrical, indoor air quality, emergency power, and fire alarm/monitoring.

- Effective, and efficient commissioning program
- Efficient and sustainable least cost operations
- Successful and efficient operational turnover and facility optimization
- LEED® certification

McKinstry's commissioning, re-commissioning, and retro-commissioning services include, but are not limited to, commissioning service on new construction, modernization projects, and existing buildings and facilities. Our expertise derives from over 49 years of design, build, operate, and maintain experience, plus 18 years of dedicated commissioning delivery. Our goal is to provide our customers with the most thorough, effective, and efficient commissioning program available and maximize each opportunity to provide efficient and sustainable least cost operations.

McKinstry performs development, design, construction, commissioning and transitional services within the LEED® certification process, both for new and existing buildings (LEED® EB). Also, we often engage with supporting the work after certification, whether involved in the construction period or not, thereby driving the LEED® certified infrastructure to a truly sustainable operation. Our focus is to first realize and deliver all of the aspects necessary to qualify for LEED® certification, second to ensure that all documentation, processes, and steps are delivered to receive the certification, and third to provide the operational elements necessary for a successful and efficient operational turnover and facility optimization.

# Special Item Number (SIN) Services

## SIN 871 207

### ENERGY AUDIT SERVICES

*Provide energy audit services including, but not limited to, developing, executing, and reporting on audit plans and/or perform energy and water audit services. Energy audits may range from cursory to comprehensive. Including, but not limited to data collection, data analysis, benchmarking with tools such as Energy Star, and written recommendations of suggested upgrades of electrical and mechanical infrastructure, including their impact on energy consumption and pollution can include recommendations for using alternative Energy Sources. Energy efficient buildings certification programs such as LEED may be included.*

#### CASE STUDY 871 207: MONONA GROVE SCHOOL DISTRICT

Monona Grove School District and McKinstry partnered to create a comprehensive energy study. This program included retro-commissioning of two buildings, a \$45,000/year Resource Efficiency/Active Energy Management service agreement, and implementation of non-proprietary controls.

#### PROJECT COST

Audit cost: \$23,750

#### RESULTS

The resulting project will save the District more than \$117,000 a year in annual utility costs and more than 2,000,000 pounds of carbon dioxide emissions.



### APPROACH

McKinstry's in-house energy engineering experts provide complete energy audit services, including energy and water audits, analysis, modeling and development of energy conservation measures (ECM) and facility improvement measures (FIM) to maximize project success. The audit phase of a project is a very important step in identifying all viable opportunities while prioritizing the most critical needs for advancing the investment grade analysis and project funding. McKinstry utilizes computer modeling and specialized analysis programs as well as measurement tools for calculation and validation. McKinstry's auditing process consists of several steps that are designed to capitalize on the efficient use of the team's time and to strategically focus on initiatives that have a high probability of implementation and energy savings success:

- Data collection from all resources
- Utility data analysis
- Site benchmarking
- Staff interviews
- Preliminary walk-through
- Preliminary initiatives development
- Detailed energy audit

### RESULTS

With our energy audit services approach, McKinstry provides an ECM and FIM matrix to demonstrate the possible improvements for client facilities and the associated energy savings. These audits have resulted in the development of numerous creative energy and water savings strategies for our customers' projects.

As an Energy Star Partner, McKinstry is committed to educating our customers on Energy Star programs and how they can benefit everyone. We benchmark all of our projects through the Energy Star Portfolio Manager Tool, which allows our customers to understand how their facilities are performing in comparison to similar buildings in the same geography. Using our in-house professional engineering team, McKinstry has assisted numerous customers in certifying their facilities through Energy Star after an energy savings project has been implemented. In addition, McKinstry has 80+ LEED-Accredited-Professionals® on staff and we are committed to sustainable and innovative design practices.

# Special Item Number (SIN) Services

## SIN 871 208

### RESOURCE EFFICIENCY MANAGEMENT

*Provide resource efficiency management (REM) including, but not limited to, providing information on possible steps that will improve energy efficiency. This information shall include estimates of cost savings and environmental benefits. This includes onsite analysis of current operations, equipment, and energy purchasing patterns. This may include the services of a resource efficiency advocate for individual or aggregated building(s) in order to maximize resource efficiency. Energy efficient buildings certification programs such as LEED may be included.*

McKinstry's resource efficiency management (REM) program significantly lowers energy expenditures through incorporating best practices in operating your facilities, behavioral changes, cost analysis, and utility rate negotiation.

### APPROACH

Our consultative approach integrates one of our energy experts with your staff so that you can leverage the power of our experience to reach your energy goals. This single point of contact is backed by the depth of McKinstry's professional staff. We provide true performance excellence by:

- Tailoring the approach for your specific facility portfolio, including using and enhancing existing facility tools and technologies to take advantage of your previous investments
- Integrating a dedicated REM manager with your facility staff, bringing our knowledge and experience to your team for a true partnership approach
- Identifying quantifiable performance benchmarks
- Using proactive communication to bring occupant behavior in alignment with facility operational goals

### RESULTS

Our services aid organizations to quickly reach and maintain utility savings of 20% or more annually. McKinstry's REM program provides:

#### *Lower Utility Costs*

- Review operating parameters and maintenance procedures
- Influence behavioral modifications
- Identify possible low or no-cost capital expense projects
- Secure local utility incentives for REM
- Verify utility bills for accuracy

#### *Utility Tracking and Analysis Systems*

- Establish a tracking system to provide a method for documenting savings

#### CASE STUDY 871 208: MARYSVILLE SCHOOL DISTRICT

Wanting to get their energy usage down in the face of rising energy and utility rates, Marysville School District in Washington State contracted with McKinstry to provide them with REM services.

#### PROJECT COST

\$100,000

#### RESULTS

McKinstry provided REM services for 18 facilities (K-12 & administrative buildings). We developed an energy policy, identified operational savings, tracked all utilities usage and costs, developed benchmarks, provided employee awareness and training programs, presented program progress/effectiveness, identified equipment replacement needs, reviewed new construction specifications, forecasts, and utility budgets, and provided alternative funding. McKinstry achieved and is currently maintaining 20% utility savings for the District.



# Special Item Number (SIN) Services

## GSA REGION 10 REM BPA

In 2010, McKinstry was awarded a blanket purchase order agreement for Resource Efficiency Management services to support GSA Region 10.

- Develop and manage Key Performance Indicators (benchmarks)
- Review load profiles and bills for anomalies
- Track Energy Star scores, develop a plan to reach award levels, and provide professional engineering services to certify

### *Introducing Industry Best Practices*

- Create or review your organization's energy policy
- Enhance or create operating guidelines for your facilities
- Train/educate owners and operators on high performance and energy efficient procedures

### *Educating Staff and Occupants*

- Launch Energy Awareness campaign through presentations and training
- Provide incentives and awards for energy awareness / behavioral change
- Present regular program updates and energy efficiency results
- Empower end users to take responsibility for their energy use
- Provide student curriculum

## SIN 871 209

### INNOVATIONS IN ENERGY

*Provide innovative approaches to renewable and/or sustainable energy, sustainability services, and energy management technology and services. These might include, but are not limited to, new developments or improvements in providing renewable energy and managing energy through biomass conversion, solar energy, fuel cells, geothermal energy, hydropower (tidal power, wave power, tidal stream power, waterwheels, and hydro electricity), wind power or other sources. These approaches should be capable of providing renewable and/or sustainable energy and sustainability services that are more "carbon-neutral", thereby lessening dependence on traditional non-renewable, "fossil fuel" sources of energy such as coal, oil, natural gas and propane. This could include sustainability and carbon management solutions such as analysis, foot printing, measuring, mitigation, verification and management, training on new energy technologies and systems, life-cycle costing, and maintenance and operational support of renewable energy systems; and the implementation, testing and evaluation of networked energy management systems and services that utilize Internet Protocol - Next Generation (IPv6) enabled systems that are configured using open standards architecture that can include Power over Ethernet (POE) implementation, wireless configurations, data security using IPSEC or 128 DES Encryption standards, high reliability, NIST compliant, and demonstrated energy efficiencies or cost savings, and are capable of integrating with existing information systems data infrastructure and backbone.*



# Special Item Number (SIN) Services

## CASE STUDY 871 209: SOUTH ROUTT SCHOOL DISTRICT

In 2007, South Routt School District still burned coal for heat. The boiler systems were antiquated 1970s technology with numerous failures and high maintenance costs. With no funding to pay for boiler replacements, they determined that energy performance contracting would be a viable method of funding and selected McKinstry as their partner to implement energy savings measures.

### PROJECT COST

\$3.8 million

### RESULTS

Coal has been completely removed from the properties and is partially displaced with a local, renewable fuel source (wood pellets). The old boiler systems have been demolished and asbestos has been remediated. The existing coal-dust air quality issues are mitigated, air conditioning is improved, and the new systems save the District \$25,000/year.

The systems are highly-efficient, dependable, and inexpensive to maintain. The project substantially decreases South Routt's carbon footprint and saves the following— Coal: 10,608 MMBtu, Propane: 6,475 therms, Electricity: 75,114 kWh, Wood Pellets: 678 MMBtu



## APPROACH

McKinstry is passionate about creating renewable, sustainable energy solutions for our customers. We start by understanding what all of our clients want—lower costs for both construction and everyday operation, lower environmental impact and carbon emissions, and worry-free performance. Then we address those concerns with the following steps:

- Determine the client's unique business condition and goals
- Benchmark current energy performance
- Match the most appropriate technologies and costs to the client's situation
- Design, price, and calculate the savings of our recommendations
- Package available financing and rebates
- Guarantee performance of our design, construction costs, and operational savings
- Remain committed to measuring, verifying, and delivering continuous improvements in performance.

Our sustainable energy program, *ASSURE*, provides our customers with solutions that are: **Adaptable** to a variety of communities, clients and resources; **Scalable** for optimum production capacity for specific needs; **Sustainable** through input and output management; **Unique** in their provision of integrated supply- and demand-side systems; **Replicable**, providing jobs and long-term economic growth in numerous communities, and; **Efficient** in energy use, process design, production and financial return.

## RESULTS

Over the past five years, our projects have eliminated over 150,000 metric tons of carbon dioxide emissions and we've saved our customers approximately 150 million kWh and 10 million Therms. We've helped transition customers from aging fossil-fuel and coal-based systems to clean systems that generate more energy than they consume and provide a positive cash flow on their balance sheet. Our renewable solutions include:

- Woody biomass boilers
- Photovoltaic solar panels
- Solar walls
- Geothermal heat pumps
- Wind power
- Landfill gas systems
- Tire recycling & Waste oil re-use
- Alternative fuel plants (biodiesel and ethanol)

# Special Item Number (SIN) Services

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Through our expertise and experience, we have successfully evaluated, engineered, implemented, and operated many renewable energy projects. Our professional staff readily performs analyses to qualify potential renewable energy opportunities, and has the experience to move good projects through project development, construction, and into sustainable production.

McKinstry renewable services:

- LEED® consulting services
- Sustainability master plans
- Carbon foot printing and strategic reduction
- Sustainable operations consulting
- Life-cycle analysis
- Energy modeling
- Retro-commissioning
- Resource efficiency management
- Facilitating maximum participation and involvement of utility companies

As a company committed to energy efficiency and sustainability, we explore opportunities and evaluate the merits of potential renewable & sustainable solutions with our clients. Multiple LEED® projects completed or currently in development consist of a large solar PV array, bio-diesel and ethanol production plants, bio-mass and geothermal heating systems, small scale wind, and co-generation systems. Carbon and greenhouse gas emission reduction verification can be part of this process. We also facilitate in the trading of carbon offset credits as a means to provide additional capital to the project.

# Special Item Number (SIN) Services

## CASE STUDY 871 210: UW MEDICAL CENTER LAUNDRY FACILITIES

This unique water storage, filtration and sterilization project demonstrates innovative solutions that decrease environmental impact through fewer chemicals and decreased water usage through an advanced filtration and sterilization process.

### PROJECT COST

\$549,208

### RESULTS

The project produces over \$164,447 of annual water and energy savings to the University of Washington Medical Center Laundry Facilities. The estimated simple payback for this project is 3.3 years. In addition to building improvements and utility savings, there is a significant positive impact on the environment. The energy savings produced directly reduce water & natural gas consumption.



## SIN 871 210

### WATER CONSERVATION

*Provide water conservation services and consulting related to the reduction of water usage, recycling of water for multiple purposes, retention of water, improvement of water quality and water flow. These services can include, but are not limited to, facility water audits, water balance, and water system analysis.*

### APPROACH

McKinstry's in-house energy engineering experts provide complete energy and water conservation audit services, including audits, analysis, modeling and development of ECMs and FIMs to maximize project success. McKinstry utilizes computer modeling and specialized analysis programs, as well as measurement tools for calculation and validation to assist our customers in identifying areas to reduce water usage, recycle, retain, and improve quality and flow.

### RESULTS

In recent years, concern for water usage and conservation measures has grown significantly. McKinstry can perform a comprehensive survey to determine where our customers would benefit from a water conservation upgrade. McKinstry has developed and implemented many water-based conservation measures (irrigation, flow reducers, waterless urinals, etc.) in addition to assisting our customers comply with State and Federal water conservation standards.

# Special Item Number (SIN) Services

## CASE STUDY 871 211: OREGON UNIVERSITY SYSTEM CLIMATE ACTION PLAN

The Oregon University System (OUS) represents over half of all State-owned facilities in Oregon. Seven campuses comprise 22,000,000 square feet of facility space. OUS selected McKinstry to create an action plan to inventory existing facility emissions and evaluate carbon mitigation strategies. McKinstry reviewed existing facilities, performed utility data analyses, established an energy performance baseline, then performed energy audits on a sampling of different facility types to understand current performance. From there, McKinstry developed conservation and climate mitigation scenarios strategies on a campus- and system-wide framework.

### PROJECT COST

\$95,000

### RESULTS

The project identified Key Performance Indicators (KPIs) that the universities can use to measure their energy and carbon performance. Based on the analysis of OUS-owned facilities, the team created a master plan for carbon mitigation in the most environmentally impactful and cost effective manner.



## SIN 871 211

### ENERGY CONSULTING SERVICES

*Contractors shall provide expert advice, assistance, guidance or counseling on energy related projects or initiatives to assist agencies in adhering to energy legislation and policy such as EPACT 2005, Executive Orders 13423 and 13514.*

*Consulting services covered by this SIN include:*

- *Energy management or strategy Energy program planning and evaluations*
- *Energy related studies, analyses, benchmarking and reporting such as feasibility studies, vulnerability assessments, and energy security*
- *Assistance in meeting energy efficient building standards such as Leadership in Energy and Environmental Design (LEED), Green Globes and Energy Star.*
- *Advisory services in obtaining alternative financing for energy projects such as Energy Savings Performance Contracts, Power Purchase Agreements or Enhanced Use Leases*
- *Consulting on carbon emissions trading programs. Consulting on where to obtain renewable energy credits/certificates Consulting on greenhouse gas measurement and management*
- *Strategic sustainability performance planning*
- *Consulting on obtaining high performance sustainable buildings.*

### APPROACH

*Energy Management or Strategy & Energy Program Planning and Evaluations*  
McKinstry's financial analysts perform a Life Cycle Cost Assessment of your existing or planned properties. We develop a cost-effective strategic plan for determining which design elements will have the best and fastest return on your investment. We set up our Total Cost of Ownership™ (TCO) decision making tool to evaluate the first, operational, future capital replacement, as well as impacts from churn, human factors, productivity, carbon, LEED®, and other environmental impacts of project decisions. The result is an operational model that allows for the best possible facility-related decisions for your assets, ultimately promoting the greatest internal earnings growth and improving your asset value.

### *Energy Related Studies*

McKinstry energy studies can provide our clients with a complete understanding of current facility performance as well as the potential areas for improvement. The study will result in a report that will also provide recommendations for facilities that includes:

- Indexing and ranking facilities using both regional and national benchmark reports

# Special Item Number (SIN) Services

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- Reporting on current period and fiscal year-to-date usage and costs, variances, and benchmarking information
- Facility performance evaluation based on key performance indicators.
- Assessment of site sustainability practices with reference to objectives.
- Identifying sustainability practices that will aid in reducing operating costs including low-cost/no-cost measures.
- Performing an initial facility evaluation to determine potential facility improvements and operational changes including low-cost/no-cost measures.
- Evaluating the potential benefits for rough order of magnitude savings potential of further systems testing and commissioning.
- Outlining potential capital investment opportunities that should be further evaluated for cost effectiveness and Total Cost of Ownership™ analysis.
- Utility data analysis for determination of utility expenditures, historical change analysis, and further performance evaluation.
- Benchmarking select facilities using the EPA Energy Star tools and provide recommendations for improving the facility energy performance.



## *Assistance in Meeting Energy Efficient Building Standards*

McKinstry provides coordination of the documentation process for our clients in addition to expertise, guidance and professional training on green building capital projects and related procedures. McKinstry's Sustainability team works with you from initial LEED® charette planning through documentation and submission for final certification. We leverage our Knowledge Response Center technology to manage and streamline the certification process. Our proven processes, leadership, and support help you achieve your desired level of certification for LEED®, ISO, or other environmental rating systems.

## *Advisory Assistance in Obtaining Alternative Funding*

McKinstry is uniquely positioned to provide maximum financing flexibility to its clients via McKinstry Capital. McKinstry Capital is a privately held financial services company headquartered in Seattle, Washington that concentrates its efforts on capital formation and optimization for energy efficiency and renewable energy production infrastructure. McKinstry Capital enjoys the freedom that comes from its independence as a financial services provider not beholden to any single source of capital. Rather, it is capable of accessing several sources of third party capital as well as its own proprietary sources. McKinstry Capital's close relationship with McKinstry enables it to understand the nuances associated with energy work, the inherent challenges involved with its implementation, and the risks related to guaranteeing energy performance.

McKinstry Capital consults with its clients to understand their unique objectives and constraints, evaluates financial solution alternatives, and develops a customized financing solution to meet clients' goals. A tax-exempt entity's decision to own or simply host an energy system is driven by numerous considerations including economic development, existing debt capacity, and future borrowing plans.

# Special Item Number (SIN) Services

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McKinstry Capital accomplishes its two-fold objective of reducing the amount of debt required and securing the lowest cost capital solution by monetizing grants, rebates, and tax incentives and then utilizing one or a combination of financing structures and vehicles.

### *Carbon Emissions & Renewable Energy Credits Consulting*

Our staff has been involved in sustainability and carbon mitigation activities through various projects. With every project, McKinstry strives to provide sustainability, cost savings, and operational improvement solutions to our clients in the most cost-effective manner. Our clients collaborate with us to understand their resource conservation options and develop carbon reduction strategies, develop methods to reduce annual utility costs, and implement upgrades to both infrastructure and operations. McKinstry facilitates strategic planning for carbon footprint reduction by performing energy supply and demand audits, as well as by reviewing realistic options, budgets, and timelines for sustainable energy sources.

### *Strategic Sustainability Performance Consulting*

McKinstry's specialists will work with you to understand your sustainability goals and design a master plan to upgrade less efficient infrastructures or engineer sustainability into a new installation on your campus. We provide in-depth knowledge of the pros and cons associated with today's green resources, technologies, and applications. Our team then provides you with a cost-effective strategic plan to implement your project.

### *Consulting on Obtaining High Performance Sustainable Buildings*

Our high-performance integrated design-build process makes full use of innovative approaches to building performance and can pave the way for increased efficiencies, reduced energy consumption, sustainability and the lowest Total Cost of Ownership™. McKinstry works in a collaborative effort with stakeholders to analyze operational activities, plans, and trends. An audit of potential improvements is developed with an implementation plan to foster a culture of sustainability for the daily life of an organization. We use energy models to optimize building design and prioritize decisions that will have the greatest effect on energy use and increase comfort and productivity for occupants and operators.

## RESULTS

More than just a buzzword, *sustainability* in facility operations leads to improved operational performance and aids in achieving your lowest possible total cost of ownership. McKinstry's expertise in the built environment and our commitment to being present For the Life of Your Building make us an ideal partner on the path to sustainable operations. Our experienced staff works with you to create successful, high performance, green buildings that are healthier, more environmentally responsible, and ultimately more profitable.

# Special Item Number (SIN) Services

## SIN 871 299

### INTRODUCTION OF NEW SERVICES

*A new service may be a task, procedure, or product existing in the commercial market which is being developed, improved, or not yet introduced to the Federal Government or not currently available under any GSA Contract, but is categorically related to this procurement.*

## McKinstry's Knowledge Response Center (KRC)

McKinstry's KRC combines service and technology to translate operational data into knowledge and action which delivers smoothly run facilities with less downtime, increased occupant satisfaction, and significant energy and operational savings that ultimately increase the value of your asset. Implementing McKinstry's KRC provides excellence in your facility operations through remote operations, monitoring, diagnostics, reporting, issue management, and enhanced communications—all backed by industry-trained service professionals. The KRC consists of three main components:



#### *Active Remote Operations—Finds and resolves issues before you do*

- Remotely detects issues within your critical systems at the equipment level, 24 hours a day, 365 days a year
- Automatically engages emergency responses
- Detects problems before they become critical, dramatically reducing accidents, downtime, and costs

#### *Active Energy Management—Innovative cost reduction*

- Provides benchmarking and measures usage against key performance indicators and goals
- Fine tunes system performance
- Reporting services turn raw data into information that drives effective business decisions and measurable operational cost savings

#### *Active Issue Management—Technology and service to power it all*

- Facility management service professionals available 24 hours a day, 365 days per year
- InfoCentre is the industry-leading computerized issue and workflow management system proactively managing and implementing building maintenance, from dispatching vendors to providing status reports
- InfoCentre schedules and tracks issues online through an easy-to-use interface, so customer can see how McKinstry is resolving issues in near real time

# Special Item Number (SIN) Services

## CASE STUDY 871 299: GSA NW ARCTIC REGION

McKinstry has partnered with the GSA Northwest Arctic Region since October of 2006 to track and manage service requests at 60 buildings serviced by more than 25 vendors in Alaska, Washington, Idaho and Oregon. McKinstry's Knowledge Response Center, powered by InfoCentre, has proven to be a beneficial issue management program for the GSA. InfoCentre provides a 24x7 solution to manage tenant service requests, vendor work orders, and dispatch frequency; all visible via a web-based portal.

## PROJECT COST

\$172,289 annual cost

## RESULTS

InfoCentre averages 2,200 work orders a month or 26,400 a year. 11.23% of those have been managed by McKinstry's after-hours team, which has proven extremely valuable to the GSA. InfoCentre also has shown an increase in tenant comfort and safety through service request accountability, maintenance savings by optimized facility staffing, and organized billing through vendor work order tracking.



## APPROACH

Our tailored approach includes using and enhancing existing facility tools and technologies to take advantage of your previous investments. We deliver on the KRC's value by *customizing communications, processes, actions, and reports* to ensure they are directly associated with your goals. We provide:

- Quantifiable performance benchmarks
- Continuous and near real time performance assurance
- A partner/consultative approach
- Relation of your progress to Energy Star and LEED® benchmarks
- An integrated technical platform with 24x7x365 industry professional support

## RESULTS

### *Efficient System Operations*

- Workflow process development and management
- Remote monitoring and operations
- Control system online support and service
- Central repository for all facility documentation – drawings, procedures, warranties, etc.

### *Increased Occupant Satisfaction*

- 24x7x365 customer service and issue management
- Event scheduling and management facility communication conduit
- Real-time online issue status tracking and performance assurance

### *Significant Energy and Operational Savings*

- Facility benchmarking
- Key Performance indicator development and management
- Active energy management and analysis
- Facility asset management
- Facility business reporting

### *Reliable Workflow Management*

- Computerized maintenance management system
- Vendor/service provider management
- 24x7x365 active issue management
- Facility issues prioritization, dispatch and tracking

# Special Item Number (SIN) Services

## CASE STUDY 871 299: CALDWELL SCHOOL DISTRICT

Caldwell was the first school district in Idaho to focus on energy savings, and used McKinstry's Transition to Sustainable Operations processes after the construction of their new LEED® Schools to improve energy efficiency and save the district money.

### PROJECT COST

\$60,000

### RESULTS

McKinstry's Transition to Sustainable Operations services eased the transition to ownership & maintenance, providing proper construction closeout, warranty compliance, procedural manuals for standard, emergency, and preventative maintenance processes, training staff on optimal operations, etc.



## Transition to Sustainable Operations (TSO™)

McKinstry provides a full Transition to Sustainable Operations (TSO™) to support customers in a smooth transition from their current facility project to the operation of their facility.

### APPROACH

Our approach encompasses three phases that are uniquely intertwined:

#### *Project Close-out*

Parallels the final stages of the energy services and project commissioning. There are three critical components within this phase:

- Documentation captures knowledge about systems, components, and features of the completed project. It is the foundation for the facility's successful operation.
- Development leverages the catalogued documentation for the essential operation of facility programs. This ensures the comfort, safety, and security of the facility and its tenants.
- Acceptance and Training transfers ownership of facility operations in addition to coordination and scheduling to provide specific system and operation knowledge.

#### *Initial Operation*

Methods and procedures to manage and maintain the equipment, and measure the results are developed. This information will be standardized so that it becomes the foundation for facility operations. These standards provide the ability to compare and track facility performance.

#### *Sustainable Operations*

Focused primarily on the delivery of reliability through a combination of highly trained personnel utilizing the programs developed throughout project closeout and initial operation.

### INNOVATION

TSO™'s innovative services include:

#### *Information/Data Management Systems*

- Drawing and equipment library, O&M data structure, digital archive, document management system
- Punch list data capture
- Warranty center

#### *Risk Mitigation*

- Mechanical/electrical system "baseline" survey and report

# Special Item Number (SIN) Services

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## *Preventative Maintenance*

- Predictive engineered maintenance plan and program
- Vendor selection and management

## *Operating Platform*

- Operating cost platform and budget
- SOP, MOP and EOP creation for critical systems, implementation and management
- Utility profile and management plan

## *Sustainability*

- LEED® and energy conservation services
- Commissioning review

## *Maintenance Management*

- Load/populate InfoCentre (CMMS)
- 24x7 call center – remote monitoring and alarming
- 24x7 operational plan and system
- Building service and maintenance
- FM staffing and services

TSO™ is committed to aligning the functioning of your building with your expectations – from budgets and energy savings to stable operations and return on investment.

## RESULTS

TSO™ proven results:

- Provides training during initial operations to ease customer into full, optimal facility operation.
- Through use of TSO techniques, customer employs forward thinking energy practices and cultivates a sense of stewardship that provides facility staff with a thorough understanding of how to optimize building operations.
- Eases the transition to ownership and maintenance by providing proper construction close-out, warranty compliance, procedural manuals for standard, emergency, and preventative maintenance processes, and training staff on optimal operations.

# Special Item Number (SIN) Services

## CASE STUDY 003 01: BENAROYA SOUTH HILL DATA CENTER

McKinstry provided and installed the open protocol integration solution at Benaroya's South Hill Data Center. They worked with the design team to determine the strategy and approach for integration of the existing building systems and data/telecom infrastructure with the new building systems to create a single user interface. The design provides a unified point of connection to the various systems installed within the facility. After integration, McKinstry set up a customized InfoCentre website, and delivered warranty services to the building tenants. They can access InfoCentre to log warranty issues and generate warranty issue requests.

### PROJECT COST

\$403,388

### RESULTS

The data center functions as a Smart Building, continuously monitoring the performance and functionality of the mechanical, electrical and controls systems. High level dashboards display system performance for operational integrity and educational outreach.



## SIN 003 01

### SMART BUILDINGS SYSTEMS INTEGRATOR

*Includes the comprehensive integration of building systems and technology using a non-proprietary and open architecture. Typical building systems to be integrated include: building automation, life safety, telecommunications, facilities management, security, energy and environmental control, HVAC, lighting, building envelope, access control, power management, cabling infrastructure/wireless, VOIP, video distribution, video surveillance, data network, etc. Typical integration functions include, but are not limited to: requirements analysis, strategic systems planning, system configuration, implementation alternatives, integration planning, system component acquisition, component integration, testing and analysis, interaction with Building Operations Centers, collection/manipulation of smart building component data, configuration management and control, design-guide development, operational training and support, monitoring, reporting and managing of the systems, and systems maintenance.*

McKinstry's Smart Building Systems Integration offering takes advantage of intelligent automation, modern communications, and other technology solutions to operate, monitor, and maintain a building in the most efficient and cost-effective manner. A smart building incorporates a range of technology services to greatly reduce energy consumption and maintenance costs while improving comfort levels and automating many of the tasks normally performed by people.

McKinstry's Smart Building Systems service offers a whole new approach to selecting and implementing technical systems in your facility. Our design team will serve as your product-neutral consultant to objectively ascertain the level of sophistication and integration your systems need, and to make recommendations for which systems best suit your business—resulting in a high performance building that achieves the long-term goals of your organization.

#### *Consulting Services*

We analyze and determine the best technology choices for your business, including comprehensive consideration of all communication and control systems: electrical, HVAC, security, lighting controls, fire alarm, safety, audio/visual, network infrastructure, etc.

#### *Systems Leveraging*

We make sure that your facility systems work as a cohesive operational system, providing you with the best allocation of your building's budget.

#### *Procurement Services*

We put McKinstry's buying power to work for you. Based on the number of products and services we procure each year, we know the options available to you and how to best deliver them on time and on budget.

#### *Transition to Sustainable Operations*

We maximize productivity by providing smart equipment to create high performance

# Special Item Number (SIN) Services

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buildings—and we're there to ensure your facility operation staff knows how to run your new investment.

## *Connection to Operations*

Making climate controls an operational tool, we position your operational teams to manage your facility proactively while maintaining safety, reliability, and utility consumption

## APPROACH

We take an analytical approach that considers every aspect of your building needs, combined with nearly 50 years of design, build, operate, and maintain experience, to deliver the best control and communication systems for your building.

## *Consultative Technique*

We spend the time to understand your specific business objectives – including your operational and sustainable goals, and your budget.

## *Simplicity in Design | Deliverables | Operations*

We devise a solution that provides operational sophistication and is customized to meet each client's unique requirements. We then integrate these solutions across all the aspects of the project.

## RESULTS

Many of the parts associated with controls and communications are interchangeable and can be integrated. We leverage our considerable expertise to achieve the outcome you desire in design and implementation.

## *Lower Total Cost of Ownership (TCO)*

We provide a competitive initial cost of services and technologies that decrease operational expense, flexibility for future technology evolution, an environment that drives higher productivity, and an increased asset value.

## *Technological Flexibility*

We are product and vendor neutral, and focus on providing the best innovative solutions for your facilities.

- Reduced operating and maintenance costs
- Improved comfort levels
- Automates tasks often performed by maintenance staff

# Special Item Number (SIN) Services

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## SIN 003 97

### ANCILLARY REPAIR AND ALTERATIONS

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*Repair and Alterations ancillary to existing SINs under this Schedule. Ancillary Repair and Alterations projects are those (1) solely associated with the repair, alternation, delivery or installation of products or services also purchased under this Schedule, and which are (2) routine and non-complex in nature, such as routine painting or carpeting, simple hanging of drywall, basic electrical or plumbing work, landscaping, and similar noncomplex services. This SIN EXCLUDES: (1) major or new construction of buildings, roads, parking lots and other facilities; (2) complex R&A of entire facilities or significant portions of facilities, and (3) Architect-Engineering Services subject to Public Law 92-582 (Brooks act).*

*The work performed under this SIN shall be associated with existing SINs that are part of this Schedule. Ancillary Repair and Alterations shall not be the primary purpose of the work ordered but be an integral part of the total solution offered. Ancillary repair and alteration services may only be ordered in conjunction with or in support of products or services purchased under this Federal Supply Schedule contract.*

McKinstry performs Ancillary Repair and Alterations as needed in support of other SINs. Our team of well-trained technicians can fully perform all aspects of maintenance, repair and restoration services to all facets of building operating systems and are backed by the full support of all business lines within the McKinstry family of operations, such as our design-build mechanical and electrical engineers.



# Price List

McKinstry's proposed labor categories associated with the performance of work under the proposed SINs of this schedule solicitation are as follows:

Labor Category (Hourly Rate)	Oct. 1, 2014–Sept. 30, 2015	Oct. 1, 2015–Sept. 30, 2016	Oct 1, 2016-Sept 30, 2017	Oct 1, 2017-Sept 30, 2018	Oct 1, 2018-Sept 30, 2019
Account Manager, Consulting	\$72.97	\$75.16	\$77.41	\$79.74	\$82.13
Admin-SR	\$75.57	\$77.84	\$80.17	\$82.58	\$85.05
Admin-Support Staff	\$59.03	\$60.80	\$62.62	\$64.50	\$66.44
Commissioning Project Director/Program Manager	\$142.80	\$147.08	\$151.50	\$156.04	\$160.72
Commissioning Tech, Start-up	\$136.64	\$140.74	\$144.96	\$149.31	\$153.79
Commissioning, TAB Technician	\$128.42	\$132.27	\$136.24	\$140.33	\$144.54
Commissioning/Controls Engineer	\$97.48	\$100.40	\$103.42	\$106.52	\$109.71
Construction Estimator, Senior	\$77.00	\$79.31	\$81.69	\$84.14	\$86.66
Energy Auditor	\$76.20	\$78.49	\$80.84	\$83.27	\$85.76
Energy Engineer	\$98.74	\$101.70	\$104.75	\$107.90	\$111.13
Energy Engineer Sr.	\$111.14	\$114.47	\$117.91	\$121.45	\$125.09
Estimator	\$110.02	\$113.32	\$116.72	\$120.22	\$123.83
Facility Manager	\$108.40	\$111.65	\$115.00	\$118.45	\$122.01
Facility Support Specialist I (CSR) (Consulting)	\$35.42	\$36.48	\$37.58	\$38.70	\$39.87
Facility Tech. Specialist II (Eng Analyst) (Consulting)	\$72.35	\$74.52	\$76.76	\$79.06	\$81.43
M&V Analyst (PAS)	\$72.35	\$74.52	\$76.76	\$79.06	\$81.43
Professional Engineer	\$115.72	\$119.19	\$122.77	\$126.45	\$130.24

# Price List

Labor Category (Hourly Rate)	Oct. 1, 2014–Sept. 30, 2015	Oct. 1, 2015–Sept. 30, 2016	Oct 1, 2016-Sept 30, 2017	Oct 1, 2017-Sept 30, 2018	Oct 1, 2018-Sept 30, 2019
Program Manager	\$102.27	\$105.34	\$108.50	\$111.75	\$115.11
Program Manager Sr.	\$117.85	\$121.39	\$125.03	\$128.78	\$132.64
Program Manager, M&V	\$84.08	\$86.60	\$89.20	\$91.88	\$94.63
Project Director	\$147.64	\$152.07	\$156.63	\$161.33	\$166.17
Project Engineer	\$78.86	\$81.23	\$83.66	\$86.17	\$88.76
Project Engineer (Remote Monitoring)	\$79.02	\$81.39	\$83.83	\$86.35	\$88.94
Project Manager	\$98.54	\$101.50	\$104.54	\$107.68	\$110.91
Project Manager Senior (Technical)	\$172.99	\$178.18	\$183.52	\$189.02	\$194.69
Project Manager Sr.	\$126.72	\$130.52	\$134.44	\$138.47	\$142.62
Project Manager, Construction	\$68.24	\$70.29	\$72.40	\$74.57	\$76.80
Senior Commissioning Engineer	\$114.03	\$117.45	\$120.97	\$124.60	\$128.34
Senior Designer/Engineer	\$115.47	\$118.93	\$122.50	\$126.18	\$129.96
Sr. Project Manager, Construction	\$87.77	\$90.40	\$93.12	\$95.91	\$98.79

Stated hourly rates are inclusive of the IFF rate to be forwarded quarterly to the GSA as a fee. The GSA Schedule rates for services offered by McKinstry, under Contract Number GS-21F-0140V, include an annual fixed escalation rate of 3%, to account of the change in the cost of business over time. McKinstry rates are being adjusted to the base year to capture lost escalation adjustments from September 2014 forward.

# Labor Category Descriptions

Position	Primary Function
<i>Project Director</i>	Deliver projects on time and on budget
<i>Program Manager Sr.</i>	Plan and direct profitable energy engineering and project development activities.
<i>Program Manager</i>	Develop and manage profitable Integrated Technology, Transitional Service and Commissioning projects.
<i>Energy Engineer, Sr.</i>	Identify, analyze and define energy savings opportunities.
<i>Energy Engineer</i>	Identify, analyze and define energy savings opportunities.
<i>Energy Auditor</i>	Conduct site surveys, gather and analyze data, and maintain project records.
<i>Commissioning/ Controls Engineer</i>	Perform and supervise commissioning and balancing activities on a variety of HVAC systems.
<i>Senior Designer/ Engineer</i>	Support the complete sales, design, preconstruction, and construction support process for a design-build project, while balancing owner's satisfaction with McKinstry gross margin.
<i>Professional Engineer</i>	Perform HVAC and plumbing design tasks.
<i>Project Engineer</i>	Complete quality HVAC and plumbing design documents, proper archiving of past projects, and assist in planning and leading training sessions for junior design staff.
<i>Project Manager Senior (Technical)</i>	Deliver project(s) on time and on budget. Project management, strategic planning, program development and execution on a global basis.
<i>Project Manager, Senior</i>	Ensure the success of assigned project(s). May supervise and mentor multiple Project Managers. Must understand corporate philosophy and ensure that the objectives of the company are reflected in project management.
<i>Project Manager</i>	Ensure the success of assigned project(s).
<i>Facility Manager</i>	Work with the owner, tenant, and property manager to ensure facility operates effectively, efficiently, and reliably. Requires decision making ability, supervision/leadership skills, planning ability, financial/budgeting capacity, and great communication considering the best interest of the

# Labor Category Descriptions

Position	Primary Function
	company, our client, and the facility.
<i>Estimator</i>	Plan project estimates and value engineering for designated areas such as sheet metal, HVAC, piping, fire protection, or major design build projects, and for coordinating estimating work with sales, engineering and operations personnel.
<i>Administrator, Senior</i>	Improve the efficiency and productivity of project managers.
<i>Administrative Support Staff</i>	Provide administrative support for Energy Services, Commissioning, and Facility Management.
<i>Account Manager, Consulting</i>	Develop and deploy smart building and active energy management projects on time and on budget.
<i>Commissioning Project Director/Program Manager</i>	Ensure continuity, quality, risk mitigation, and profitability through all cycles of a project.
<i>Project Manager, Construction</i>	Ensure the success of projects through oversight and management of resources.
<i>Sr. Project Manager, Construction</i>	Ensure the success of projects through oversight and management of resources.
<i>Facility Support Specialist I (CSR) (Consulting)</i>	Customer point of contact to ensure the efficient flow of work order information and deliver professional and knowledgeable customer service.
<i>Sr. Commissioning Engineer</i>	Perform commissioning and balancing activities on a variety of HVAC systems for the purpose of verifying engineering specifications.
<i>Commissioning Tech, Start-up</i>	Coordinate and perform test, adjust and balance work, control point-to-point verification, record data, and assist commissioning engineers as needed.
<i>Facility Tech. Specialist II (Eng Analyst) (Consulting)</i>	Customer point of contact to generate and administrate facility-related work orders, contact service providers, and relay information in a timely and responsible manner.
<i>M&amp;V Analyst (PAS)</i>	Ensure guaranteed energy savings are met and documented to fulfill contractual requirements.
<i>Program Manager, M&amp;V</i>	Ensure guaranteed energy savings are met and documented to fulfill contractual requirements.
<i>Project Engineer (Remote Monitoring)</i>	Assist in the Operations department's project development through drawings and creating contracts.

# Labor Category Descriptions

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Position	Primary Function
<i>Sr. Construction Estimator</i>	Develop, plan, supervise, and participate in the preparation of mechanical cost estimates for projects being pursued.
<i>Commissioning, TAB Technician</i>	Perform commissioning and balance activities on variety of HVAC systems.

# Purchasing Information

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<i>Contractor:</i>	McKinstry Essention, LLC.
<i>Contract Number:</i>	GS-21F-0140V
<i>Contract Period:</i>	September 10, 2014 – September 9, 2019 (with two 5-year options)
<i>Awarded Special Item Numbers:</i>	SIN 871 100 Ancillary Supplies & Services SIN 871-202 Energy Management Planning and Strategies SIN 871-203 Training on Energy Management SIN 871-204 Metering Services SIN 871-205 Energy Program Support Services SIN 871-206 Building Commissioning Services SIN 871-207 Energy Audit Services SIN 871-208 Resource Efficiency Management SIN 871-209 Innovations in Energy SIN 871-210 Water Conservation SIN 871-211 Ancillary Supplies & Services SIN 871-299 Introduction New Services SIN 003-01 Smart Building Systems Integrator SIN 003-97 Ancillary Repair and Alterations
<i>Minimum/Maximum Order:</i>	None
<i>Geographic Coverage:</i>	Domestic
<i>Primary Points of Production:</i>	California, Colorado, Idaho, Kansas, Minnesota, Montana, Oregon, Texas, Washington, and Wisconsin
<i>Discount from List Prices:</i>	McKinstry does not offer any discounts better than our best price as offered to the GSA.
<i>Payment Terms:</i>	Net 30
<i>Payment Methods:</i>	Electronic Funds Transfer (EFT), check, Government procurement cards
<i>Time of Delivery:</i>	Project specific
<i>FOB Point:</i>	Destination unless stated otherwise in contract Delivery Order
<i>Ordering/Payment Address:</i>	P.O. Box 24567, Seattle, WA 98124
<i>Ordering E-mail:</i>	<a href="mailto:tombo@mckinstry.com">tombo@mckinstry.com</a>



# Purchasing Information

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*Company Website*      [www.mckinstry.com](http://www.mckinstry.com)  
*Address:*

*McKinstry/Primary*      Karen Firmaniuk, Operations Manager  
*Point of Contact:*      Telephone: (206) 763-4828, karenf@mckinstry.com

*Business Size:*              Small

*NAICS:*                      238220, 561210, 541618

*DUNs Number:*              07-874-6529

*Purchase Card:*              Government-wide Commercial Purchase Card will be  
accepted.

# How to Order from a BPA

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This information will assist ordering agency offices understand how to utilize Blanket Purchase Agreements (BPAs) under the GSA Federal Supply Schedule contracts.

Blanket Purchase Agreements (BPAs) are a simplified method of filling anticipated repetitive needs for services and products. BPAs are "charge accounts" that ordering offices establish with GSA Schedule contractors to provide themselves with an easy ordering tool. In accordance with Federal Acquisition Regulation (FAR) 8.404, ordering offices may establish BPAs under any GSA Schedule contract.

## Benefits and Advantages of Using BPAs

Contractual terms and conditions are contained in the GSA Schedule contracts and are not to be renegotiated for the GSA Federal Supply Schedule BPAs. Therefore, as a purchasing option, BPAs eliminate such contracting and open market costs as the search for sources, the need to prepare solicitations, and the requirement to synopsize the acquisition. BPAs also—

- Satisfy recurring requirements;
- Reduce acquisition costs through quantity discounts;
- Save time by eliminating repetitive, individual purchases and payments;
- Reduce administrative efforts and paperwork;
- Obtain better value by leveraging an ordering office's buying power through volume purchasing;
- Enable an ordering office to use streamlined ordering procedures with no dollar limitations on individual task/delivery orders;
- Permit an ordering office to incorporate Contractor Team Arrangements;
- Allow for quicker turnarounds on orders; and
- Permit an ordering office to incorporate terms and conditions not in conflict with the underlying contract.

A BPA can be set up for local and regional offices across the nation to use, thus allowing them to participate in an ordering office's BPA and place orders directly with GSA Federal Supply Schedule contractors. In doing so, the entire agency reaps the benefits of additional discounts negotiated into the BPA. In addition, the ordering office reduces the administrative burden of writing numerous task/delivery orders, while still being able to order as much as it wants and as often as it wants. The flexibility and advantages are endless when setting up a BPA.

## Establishing a BPA

BPAs are established directly with a GSA Schedule contractor(s). In accordance with FAR 8.404, an ordering office may request a price reduction based on the total estimated volume of the BPA, regardless of the size of individual orders. The Request For Quotation (RFQ) should specify the ordering office's requirements,

# How to Order from a BPA

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including estimated quantities and work to be performed, and should advise GSA Schedule contractors whether the ordering office intends to establish a single BPA or multiple BPAs.

Generally, a single BPA should be established when the ordering office can easily define its services and/or products requirements and a firm-fixed price or ceiling price can be established. Since a best value selection is made when the single BPA is established, the ordering office does not need to make a separate best value selection for each order under the BPA. Multiple BPAs should be established when the ordering office cannot easily define its services and/or products requirements, or it determines that more than one BPA is needed to meet its needs. First determine which GSA Schedule contractors are technically qualified and then establish BPAs with them. When multiple BPAs are established, each order must be competed among all BPA holders and a best value selection must be made each time an order is placed. All BPAs must contain certain information, such as:

- The name of the GSA Schedule contractor;
- The GSA Schedule contract number;
- The BPA number assigned by the ordering office;
- A description of the requirement, to include estimated quantities and work to be performed;
- The prices and/or discounts;
- The extent of the obligation;
- Any additional price reductions negotiated by the ordering office, based on the proposed dollar value of the BPA;
- A listing of individuals authorized to purchase under the BPA;
- The delivery or performance time frames;
- The location of deliveries;
- The frequency of ordering and invoicing;
- The date of BPA expiration; and
- A statement that all other terms and conditions are contained in the GSA Federal Supply Schedule contract.

*Note: Prices under GSA Federal Supply Schedule contracts have already been determined to be fair and reasonable.*

# How to Order from a BPA

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## Best Value Blanket Purchase Agreement

### FEDERAL SUPPLY SCHEDULE

*(Insert Customer Name)*

In the spirit of the Federal Acquisition Streamlining Act, ( \_\_\_\_\_ **Agency** \_\_\_\_\_ ) and **McKinstry Essention, LLC**, enter into a cooperative agreement to further reduce the administrative costs of acquiring commercial items from the General Services Administration (GSA) Federal Supply Schedule Contract(s) **GS-21F-0140V**.

Federal Supply Schedule Contract BPAs eliminate contracting and open market costs such as search for sources, development of technical documents, solicitations and the evaluation of offers. Teaming Arrangements are permitted with Federal Supply Schedule Contractors in accordance with Federal Acquisition Regulation (FAR) 9.6.

This BPA will further decrease costs, reduce paperwork, and save time by eliminating the need for repetitive, individual purchases from the Schedule Contract. The end result is to create a purchasing mechanism for the Government that works better and costs less.

Signatures:

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Agency

Date

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McKinstry Essention, LLC.

Date



# How to Order from a BPA

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BPA NUMBER \_\_\_\_\_

(Customer Name)  
Blanket Purchase Agreement

Pursuant to GSA Federal Supply Schedule Contract Number(s) **GS-21F-0140V**, Blanket Purchase Agreements (BPAs), McKinstry Essention, LLC. agrees to the following terms of a BPA EXCLUSIVELY WITH **(Ordering Agency)**:

(1) The following contract items can be ordered under this BPA. All orders placed against this BPA are subject to the terms and conditions of the contract, except as noted below:

Special Item Number:	*Special BPA Discount/Price:
_____	_____
_____	_____

(2) Delivery:	Delivery Schedule/Dates
Destination	
_____	_____

(3) The Government estimates, but does not guarantee, that the volume of purchases through this agreement will be \_\_\_\_\_.

(4) This BPA does not obligate any funds.

(5) This BPA expires on \_\_\_\_\_ or at the end of the contract period, whichever is earlier.

(6) The following office(s) is hereby authorized to place orders under this BPA:

Office(s): \_\_\_\_\_

Point of Contact: \_\_\_\_\_

(7) Orders will be placed against this BPA via Electronic Data Interchange (EDI), FAX, or paper.

(8) Unless otherwise agreed to, all deliveries under this BPA must be accompanied by delivery tickets or sales slips that must contain the following information as a minimum:

(a) Name of Contractor: **McKinstry Essention, LLC.**



# How to Order from a BPA

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(b) Contract Number: **GS-21F-0140V**

(c) BPA Number:

(d) Special Item Number:

(e) Purchase Order Number:

(f) Date of Purchase:

(g) Quantity, Unit Price, and Extension of Each Item (unit prices and extensions need not be shown when incompatible with the use of automated systems, provided that the invoice is itemized to show the information):

(h) Date of Shipment:

(9) The requirements of a proper invoice are specified in the Federal Supply Schedule Contract. Invoices will be submitted to the address specified within the purchase order transmission issued against this BPA.

(10) The terms and conditions included in this BPA apply to all purchases made pursuant to it. In the event of an inconsistency between the provisions of this BPA and Pepco Energy's invoice, the provisions of this BPA will take precedence. The Federal Supply Schedules Program permits contractors to offer price reductions in accordance with commercial practice. Contractor Team Arrangements are permitted with Federal Supply Schedule contractors in accordance with FAR Subpart 9.6.