



SHOP DRAWINGS AND PRODUCT DATA



Checking is only for general conformance with the design concept of the project and general compliance with the information given in the contact documents. Any action shown is subject to the requirements of the plans and specifications. Contractor is responsible for: Dimensions, which shall be confirmed and correlated at the job site; fabrication processes and techniques of construction; coordination of his work with that of all other trades; and the satisfactory performance of this work.

Statement of Qualifications

- NO EXCEPTION TAKEN
- REVIEWED AS NOTED
- REVISE AND RESUBMIT

DATE: 3-7-22 SIGNED: MATT AUTREY

Project

Presented To

Presented By



NEBB#3520



OR# 193826



CA#1022249



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Section A **Letter of Introduction**

Precision Test & Balance, Inc. was established in 1999 to provide our clients with maximum service at an affordable price.

Our corporate philosophy is to work closely with owners, design engineers and contractors to achieve optimum performance of mechanical systems.

As a service company our only “product” is a report, however, a well-designed and balanced HVAC system can be recognized by the lack of occupant comfort complaints. We believe that a gradual and controlled growth policy will ensure our balancing technicians have been trained thoroughly according to NEBB, AABC, and ASHRAE 111 standards.

The principles of Precision Test & Balance, Inc. have over Fifty years of combined experience, which will be covered in other sections, but we think it is important to mention that we have worked on many projects involving educational, commercial, industrial, medical research and hi-tech facilities.

We look forward to working with you in the near future.

Sincerely,

Adam Jakobsen
President

Douglas L. Forster
Chairman



Section B
Principles & Key Staff Members

Principles

Adam Jakobsen, President
Douglas L. Forster, Chairman

Staff

Zach Werber, Team Lead
Curtis Treiber, Team Lead
Jeffrey Shuford, Technician
Nick Dunn, Technician
Daniel Smith, Technician
Melissa Jakobsen, Project Assistant
Amy Hergert, Office Manager



Section C **Qualifications of Key Personnel**

Adam Jakobsen

- 10 years with Precision Test & Balance, Inc.
- NEBB TAB-CP (24258)

Douglas L. Forster

- A.A.S. Mechanical Engineering Technology - PCC
- NEBB TAB-CP (23815)
- NEBB Sound Measurement-CP (23815)
- NEBB Vibration Measurement-CP (23815)
- EIT Certificate #60122 (OR)
- 20 years principle – Precision Test & Balance, Inc.
- 19 years of TAB experience with Northwest Engineering Service, Inc.

Zachary Werber

- B.S. Mechanical Engineering – Portland State (2015)
- B.S. Nuclear Engineering – Oregon State (2009)
- NEBB TAB-CT (22101)
- EIT Certificate #32581 (WA)
- 4 years with Precision Test & Balance, Inc.

Curtis Treiber

- B.S. Materials Science & Engineering – Washington State (2016)
- NEBB TAB-CT (22121)
- 3 years with Precision Test & Balance, Inc.

Jeffrey Shuford

- B.S. Physics – Oregon State (2017)
- 1 year with Precision Test & Balance, Inc.

Melissa Jakobsen

- 6 years with Precision Test & Balance, Inc.

Nick Dunn

- A.A.O.T. – Clackamas Community College (2009)
- 1 year with Precision Test & Balance, Inc.



Section D

Scope of Services & Project Approach

A. Scope of Services

We at Precision Test & Balance, Inc. feel we offer a full range of services in the HVAC testing, adjusting and balancing field. Our services include:

1. HVAC Air Systems Testing, Adjusting & Balancing
2. HVAC Hydronic Systems Testing, Adjusting & Balancing
3. HVAC Systems Monitoring & Surveying
4. Lab Hood Certification
5. Duct & Plenum Air Leakage Testing
6. Sound & Vibration Testing

B. Project Approach

Following is a brief outline of approaching a project.

1. Initial Planning

- A. Review Plans and Specifications
- B. Assess Design Intent

2. Initial Review

- A. Plan and schedule Testing, Adjusting and Balancing procedures
- B. Set-up project on appropriate test forms
- C. Preliminary field check of HVAC equipment and systems
- D. Collect equipment data verify with design
- E. Report any deficiencies that would prevent system to be properly balanced

3. Data Procurement

- A. Acquire fan and pump curve submittal data
- B. Acquire any manufacturers published data, i.e., electrical, air, water or control elements



4. System Field Review

- A. Locate all balancing or control devices
- B. Report any deficiencies in installation
- C. Verify systems readiness for balancing, i.e., automatic controls

5. System Start-up

- A. Verify piping and ductwork are clear of obstructions
- B. Bump fans and pumps for proper rotation
- C. Assist Mechanical Contractor with system start-up

6. Air Balance Procedure

- A. Set fan condition for full-flow (cooling)
- B. Check motor amperage
- C. Traverse fan total for design volume
- D. Change fan speed if necessary
- E. Spot check for air circulation in various rooms
- F. Balance supply system (proportional method)
- G. Balance return or exhaust systems (proportional method)
- H. Re-adjust supply and return fans speeds as needed
- I. Read out systems for final readings
- J. Record fan(s) operating data under required conditions

7. Hydronic Balance Procedure

- A. Set pump condition for full flow (heating or cooling)
- B. Measure amperage
- C. Measure pump total and adjust if necessary
- D. Spot check for water circulation at various coils
- E. Balance water system (proportional method)
- F. Re-adjust pump volume for 100% flow if possible
- G. Read out water system
- H. Record pump(s) operating data under required conditions

8. Duct-Air Leakage Procedure

- A. Identify ductwork section(s) to be tested
- B. Calculate surface area of section



- C. Determine allowable leakage rate, based on duct and leakage class from specification
- D. Pressurize ductwork to specified pressure level
- E. Measure flow required to maintain specified test pressure
- F. Compare leakage flow rate to allowable.
- G. If measured leakage is less than allowable, the section passes. If the leakage is more than allowable, mechanical contractor to remediate duct section to find source of leakage. Retest section using steps D-G until section is within allowable tolerances.

9. Reporting

- A. Review field data
- B. Report any discrepancies encountered during the project
- C. Input all data into a computer for future reference
- D. Edit reports for typographical errors or omissions
- E. Duplicate for distribution all applicable data and blueprints with elements or openings numbered for easy reference
- F. Publish required number of reports for review



Section E **Experience with Mechanical Systems & Equipment**

Following is partial list of mechanical systems and equipment we have worked on and have extensive experience with.

- | | | |
|-----------------------|--------------------------|-------------------------|
| 1. <u>Fan Systems</u> | 2. <u>Terminal Units</u> | 3. <u>Water Systems</u> |
| Package | Variable Volume | Pumps (Primary) |
| Built-up | VAV with Reheat | Pumps (Secondary) |
| VAV | Constant Volume | Pumps (Tertiary) |
| Constant Volume | CV with Reheat | Chillers |
| Dual Duct | Dual Duct | Boilers |
| Multi-zones | Fan Powered Parallel | Steam |
| Process Exhaust | Fan Powered Series | Cooling Towers |
| Utility Exhaust | Induction | Water Cooled Units |
| Split Systems | Pressure Dependent | |
| Makeup Air | Pressure Independent | |
| | Chilled Beams | |



Section F **Experience with Mechanical Control Systems**

We have working knowledge of the following control systems.

1. Siemens
2. Johnson Controls / Metasys
3. Honeywell
4. Trane
5. Carrier Parker Valve
6. Phoenix Valves
7. Alerton
8. Delta
9. Automated Logic
10. Distech Controls
11. Schneider Electric

We have an excellent working relationship with all of the major control companies and often on a first name basis with control fitters and technicians.



Section G
Project Management History (Partial)

Projects

US Bancorp Tower & Plaza Buildings
Construction & Sustaining
Portland, Oregon

TTM Technologies (Merix) Corporation
Construction, Sustaining, Certifications
Forest Grove, Oregon

Providence St. Vincent Hospital
Construction, Sustaining
Portland, Oregon

St. Charles Medical Center
Bend, OR

Fred Meyer Stores Northwest & Alaska
60+ Projects Oregon, Washington, Alaska, Idaho

Providence St. Vincent's Hospital
New/Sustaining Projects
Portland, OR

Wells Fargo Tower
Sustaining, Tenant Improvements
Portland, OR

Redwood Science Lab
Arcata, CA

Prineville Critical Access Hospital
Prineville, OR

St. Joseph Hospital Expansion
Eureka, CA

Contacts

Todd Murphey
Unico Properties

Mr. Jack White
Engineer

Mr. Matt Masters, P.E.
PSVMC Facilities

Mr. Kevin Link
Skanska USA PM

Wael Chamseddine
Wytek Controls

John Casessa, PE.
Mgr. Physical Plant

Paul Lukes
Streimer SMW PM

Warren Hanna
U.S. Forest Service

Don Milburn
Cascade Heating

Mike Finley
O&M Industries



Section H
Reference List

1. Steve Strauss, P.E.	Glumac International	Portland, OR	503/227-5280
2. Rick Silenzi	Interface Engineering	Corvallis, OR	541/752-8932
3. James Thomas, P.E.	Glumac International	Portland, OR	503/227-5280
4. Ed Carlyle, P.E.	R & W Engineering	Portland, OR	503/292-6000
5. Gary Barnes, PE	System Design Consultants	Portland, OR	503/248-0227
6. John Farley, P.E.	System Design Consultants	Portland, OR	503/248-0227
7. William Caron, P.E.	Mazzetti	Portland, OR	503/601-5963
8. Andy McCann P.E.	McCann Engineering	Portland, OR	503/243-2448
9 Paul Lukes	Streimer Sheet Metal Works	Portland, OR	503/288-9393
10 Mike Finley	O&M Industries	Arcata, CA	707/822-8800



Section I
Instrument Calibration List

INSTRUMENT / SERIAL#	APPLICATION	DATE OF USE	CAL. TEST DATE
EVERGREEN CH-15D / 1700174	FLOW HOOD	TBD	04/07/2021
EVERGREEN S-PVF-1 / 2100233A	PRESS. / VEL.	TBD	04/07/2021
TSI ALNOR RVA501 / RVA501540003	RVA	TBD	04/22/2021
SHORTRIDGE HDM-250/ W99148	WATER BALANCE	TBD	07/23/2021
EVERGREEN RM-T-1/ 1900274	TEMPERATURE	TBD	01/15/2021
RETROTEC 400 SERIES / 4LF000125	DUCT LEAKAGE	TBD	05/20/2020

Instruments Listed are those typically used on projects. Some instruments may not be used on all projects. Instruments may be **calibrated again prior** to project depending on timeframe.



Firm Certification

PRECISION TEST & BALANCE, INC.

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

Testing, Adjusting and Balancing of Environmental Systems

3520

NEBB Certification Number

March 31, 2022

Expiration Date

NEBB President

NEBB President-Elect



Certification

DOUGLAS L. FORSTER

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

Testing, Adjusting and Balancing of Environmental Systems

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

CP-23815

NEBB Certification Number

March 31, 2022

Expiration Date

NEBB President

NEBB President-Elect



Certification

DOUGLAS L. FORSTER

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

Sound Measurement

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

CP-23815

NEBB Certification Number

March 31, 2022

Expiration Date

NEBB President

NEBB President-Elect



Certification

DOUGLAS L. FORSTER

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

Vibration Measurement

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

CP-23815

NEBB Certification Number

March 31, 2022

Expiration Date

NEBB President

NEBB President-Elect



Certification

ADAM JONATHON JAKOBSEN

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

Testing, Adjusting and Balancing of Environmental Systems

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

CP-24258

NEBB Certification Number

March 31, 2023

Expiration Date

NEBB President

NEBB President-Elect



Section J
Balancing Forms (Partial)

↓See forms below↓

Project Name		Performed By: Tech, Tech
FAN SYSTEM:		Date: Month Year
Equipment Tag ID	Project: #####	

UNIT / FAN DATA

Type of Unit	Arrangement
Manufacturer	Discharge
Model Number	Number of Fans
Serial Number	Fan Size (\pm inches)
Filter Size (Qty.)	Drive Type

MOTOR DATA

Manufacturer	Amperage
Horsepower	Voltage
RPM	Phase
Frame	Efficiency
Thermal Protection	Power Factor
Starter Type	Service Factor

OPERATIONAL DATA

<u>Design</u>	<u>Initial Test</u>	<u>Final Test</u>	
Condition		MINIMUM OSA SET	
Plan CFM			
Fan RPM			
Amperage			
Voltage			
Brake HP			
TSP (in WC)			
ESP (in WC)			

SYSTEM PRESSURES (in WC)

	<u>Initial Test</u>			<u>Final Test</u>					
	IN	OUT	Δ	IN	OUT	Δ	IN	OUT	Δ
Filter									
Coil									
Fan									

NOTES:

Project Name		Performed By: Tech, Tech
FAN SYSTEM:		Date: Month Year
Equipment Tag ID		Project: #####

SHEAVES AND BELTS - As Found

Fan Sheave				Motor Sheave			
Bushing				Bushing			
Bore				Bore			
Belt Size				Number of Belts			
	Min.	Set @	Max.		Min.	Set @	Max.
Center Distance (in)				Pitch Diameter (in)			

SHEAVES AND BELTS - Final

Fan Sheave				Motor Sheave			
Bushing				Bushing			
Bore				Bore			
Belt Size				Number of Belts			
	Min.	Set @	Max.		Min.	Set @	Max.
Center Distance (in)				Pitch Diameter (in)			

NOTES:

EXAMPLE

Project Name		Performed By: Tech, Tech
		Date: Month Year
FAN SYSTEM (EMBEDDED)	Equipment Tag ID	Project: ####

UNIT / FAN DATA

Type of Unit	Arrangement
Manufacturer	Discharge
Model Number	Number of Fans
Serial Number	Size (± inches)
Filter Size (Qty.)	Drive Type

MOTOR DATA

Amperage	Voltage
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OPERATIONAL DATA

<u>Design</u>	<u>Initial Test</u>	<u>Final Test</u>	
Condition			
Plan CFM			
Fan RPM			
Amperage			
Voltage			
TSP (in WC)			
ESP (in WC)			

SYSTEM PRESSURES (in WC)

	<u>Initial Test</u>			<u>Final Test</u>					
	IN	OUT	Δ	IN	OUT	Δ	IN	OUT	Δ
Filter									
Fan									
Coil									

NOTES:

Project Name		Performed By: Tech, Tech
FAN SYSTEM:		Date: Month Year
Equipment Tag ID		Project: #####

UNIT / FAN DATA

Type of Unit	Arrangement
Manufacturer	Discharge
Model Number	Number of Fans
Serial Number	Fan Size (± inches)
	Drive Type

MOTOR DATA

Manufacturer	Amperage
Horsepower	Voltage
RPM	Phase
Frame	Efficiency
Thermal Protection	Power Factor
Starter Type	Service Factor

OPERATIONAL DATA

<u>Design</u>	<u>Initial Test</u>	<u>Final Test</u>	
Condition		100% EXHAUST	
Plan CFM			
Fan RPM			
Amperage			
Voltage			
Brake HP			
TSP (in WC)			
ESP (in WC)			

SYSTEM PRESSURES (in WC)

	<u>Initial Test</u>			<u>Final Test</u>					
	IN	OUT	Δ	IN	OUT	Δ	IN	OUT	Δ
Fan									

NOTES:

Project Name	Performed By: Tech, Tech
Direct Drive Fans Less Than 1/6 HP (125W)	Date: Month Year
	Project: #####

UNIT DATA

Designation						Manufacturer								
Type of Unit						Model Number								
Motor Horsepower						Serial Number								
Location		Grille / Diffuser Data				Design		Initial			Final			Notes
Name	Room #	Type	Device	Size (in)	Area	FPM	CFM	FPM	CFM	%	FPM	CFM	%	
Exhaust														

UNIT DATA

Designation						Manufacturer								
Type of Unit						Model Number								
Motor Horsepower						Serial Number								
Location		Grille / Diffuser Data				Design		Initial			Final			Notes
Name	Room #	Type	Device	Size (in)	Area	FPM	CFM	FPM	CFM	%	FPM	CFM	%	
Exhaust														

UNIT DATA

Designation						Manufacturer								
Type of Unit						Model Number								
Motor Horsepower						Serial Number								
Location		Grille / Diffuser Data				Design		Initial			Final			Notes
Name	Room #	Type	Device	Size (in)	Area	FPM	CFM	FPM	CFM	%	FPM	CFM	%	
Exhaust														

NOTES:

Project Name										Performed By: Tech, Tech	
MINIMUM OUTSIDE AIR BY TEMPERATURE - DIFFERENCE METHOD (RA - MA) / (RA - OSA)										Date: Month Year	
										Project: ####	

Fan Unit	OSA	Initial					Final					Damper Position
		RA °F	MA °F	OSA °F	% Design	% Actual	RA °F	MA °F	OSA °F	% Design	% Actual	
	MIN											
	MAX											

	MIN											
	MAX											

	MIN											
	MAX											

	MIN											
	MAX											

	MIN											
	MAX											

	MIN											
	MAX											

	MIN											
	MAX											

	MIN											
	MAX											

	MIN											
	MAX											

	MIN											
	MAX											

NOTES:

Project Name	Performed By: Tech, Tech
PUMP SYSTEM:	Date: Month Year
Equipment Tag ID	Project: #####

UNIT / PUMP DATA

Manufacturer	Area Served
Model Number	Impeller Diameter (in)
Serial Number	Pump off Press. (Static)

MOTOR DATA

Manufacturer	Amperage
Horsepower	Voltage
RPM	Phase
Frame	Efficiency
Thermal Protection	Power Factor
Starter Type	Service Factor

OPERATIONAL DATA

	<u>Design</u>	<u>Initial Test</u>	<u>Final Test</u>
Pump Condition			ALL VALVES OPEN
System ΔP (Psi)			
Pump GPM			
Pump RPM			
Amperage			
Voltage			
Brake HP			
Inlet Press.			
Outlet Press.			
Head (ft)			
Head (psig)			

NOTES:

Project Name		Performed By: Tech, Tech
PUMP SYSTEM:	Equipment Tag ID	Date: Month Year
		Project: ####

Chiller Performance Sheet

UNIT DATA

Manufacturer	Evaporator Bundle Size
Model Number	Condensor Bundle Size
Serial Number	

TESTING DATA

Chiller Tag	Balancing Device		Design				Initial			Final			
	Condition	Type	Size (in)	ΔP (ft)	GPM	Set Point	ΔP (ft)	GPM	%	Set Point	ΔP (ft)	GPM	%

EXAMPLE

NOTES:

Project Name

Performed By: Tech, Tech

Date: Month Year

FAN SYSTEM

Equipment Tag ID

Project: #####

Electric Heat Coil Performance

Location Name	Actual		Voltage			Amperage			Results			
	CFM	Phase	T1	T2	T3	T1	T2	T3	Kw	Stages	EAT	LAT

Single Phase = (Amperage * Voltage) / 1000 = Kw

Three Phase = (1.73 * Avg. Amperage * Avg. Voltage) / 1000 = Kw

NOTES:

