



11 A  
1101 MB  
1102 ft  
1103 CW

DEPARTMENT OF THE NAVY  
NAVAL FACILITIES ENGINEERING COMMAND  
200 STOVALL STREET  
ALEXANDRIA, VA 22332 2300

PMR Team

IN REPLY REFER TO

DOC: TABS.DOC  
Ser  
17 JUL 97

From: Commander, Naval Facilities Engineering Command  
To: Distribution

Subj: **TEST, ADJUST AND BALANCE (TAB) SCHEDULE/MILESTONES** (39-97)

Encl: (1) TAB Schedules/Milestones Guidance

1. This letter establishes a requirement for contractors to provide a detailed listing of TAB field work for Heating, Ventilating and Air Conditioning (HVAC) systems. The implementation guidance is provided by enclosure (1) and is applicable to all newly awarded contracts. Enclosure (1) requires TAB field work to be broken down in the Schedule of Prices or the Network Analysis System by separate line items which reflect measurable deliverables. The enclosure provides recommended guidance for breaking down TAB field work with the specific payment percentages for each line item to be determined on a case by case basis. The recommended stages for breaking down TAB field work have been selected with a view towards facilitating regular progress payments for TAB contractors and improving the quality of HVAC work by making it easier to monitor the work in stages.

2. The quality of HVAC work has been an issue within DoD over the years. The requirements provided by enclosure (1) will encourage persons responsible for TAB work to become more familiar with what is required and should result in improved quality of HVAC systems. NAVFAC P-68 and applicable NAVFAC guide specifications will be revised to include this change. The point of contact on this matter is Vincent M. Spaulding, 703-325-7655 or Miguel López, 703-325-9015.

  
ROBERT R. BOYER  
By direction

**Subj: TEST, ADJUST AND BALANCE (TAB) SCHEDULE/MILESTONES**

**Distribution:**

COMPACNAVFACENGCOM (00, 02, 04, 50)  
COMLANNAVFACENGCOM (00, 02, 04, 05)  
CO SOUTHWESTNAVFACENGCOM (00, 02, 04, 5S00)  
CO SOUTHNAVFACENGCOM (00, 02, 05, 07)  
CO NORTHNAVFACENGCOM (00, 02, 04, 09X2)  
CO EFA CHESAPEAKE (00, 02, 04, 05A)  
CO EFA NW (00, 02, 09A)  
CO EFA MIDWEST (00, 02, 44)  
CO EFA MED (00, 02, 04, N3)  
CO EFA WEST (00, 02, 02R, T2)  
CO PWC JACKSONVILLE (00, 200)  
CO PWC PEARL HARBOR (00, 200)  
CO PWC GUAM (00, 200)  
CO PWC GREAT LAKES (00, 200)  
CO PWC NORFOLK (00, 02)  
CO PWC PENSACOLA (00, 200)  
CO PWC SAN DIEGO (00, 200)  
CO PWC SAN FRANCISCO (00, 200)  
CO PWC YOKOSUKA (00, 200)  
CO PWC WASHINGTON (00, 200)  
PMR TEAM  
→ CO, CIVIL ENGINEER CORPS OFFICERS SCHOOL  
NAVAL FACILITIES CONTRACTS TRAINING CENTER  
NAVAL FACILITIES CONTRACT OFFICE, PORT HUENEME (27)

**Copy to:**

NAVFACENGCOM 11/111/114/114B/15/15T/151/30A  
ASN RDA ABM (Clarence Belton)

## **TEST, ADJUST AND BALANCE (TAB) SCHEDULE/MILESTONES GUIDANCE**

A. The TAB field work shall be broken down in the Schedule of Prices or the Network Analysis System by separate line items which reflect measurable deliverables. Specific payment percentages for each line item should be determined on a case by case basis for each contract.

B. The contractors shall be required to break down TAB work using the following line items for TAB progress payment schedule/milestones to be applied, as appropriate, on a project by project basis:

**1. Approval of design review report:** The TAB Agency conducts a review of the project plans and specifications to identify any feature, or the lack thereof, that would preclude successful testing and balancing of the project HVAC systems. The findings are submitted to the Government to allow correction of the design. Progress payment should be made after review and approval of the report.

**2. Approval of the pre-field engineering report:** The TAB Agency submits a report which outlines the scope of field work. The report contains details of what systems will be tested, procedures to be used, sample report forms for reporting test results and a quality control checklist of work items that must be completed before TAB field work commences. Progress payment should be made after review and approval of the report.

**3. Season I field work:** The TAB Agency mobilizes to the project site and executes the field work as outlined in the pre-field engineering report. The HVAC water and air systems are balanced and operational data is collected for one seasonal condition (either summer or winter depending on project timing). Incremental payments should be issued as the TAB field work progresses.

**4. Approval of Season I report:** On completion of the Season I field work, the TAB Agency compiles the data into a report and submits it to the Government for approval. The report is reviewed, and approved, after ensuring compliance with the pre-field engineering report scope of work. Progress payment should be made after review and approval of the report.

**5. Completion of Season I field QA check:** The TAB Agency meets with contractor QC and government representatives at the jobsite to retest portions of the systems reported in the Season I report. The purpose of these tests are to validate the accuracy and completeness of the previously submitted Season I report. Progress payment should be made after review and approval of the QA Check.

**6. Approval of Season II report:** The TAB Agency completes all season II field work, which is normally comprised mainly of taking heat transfer temperature readings, in the season opposite of that under which Season I performance data was compiled. This data is compiled into a report and submitted to the Government. On completion of submittal review to ensure compliance with the pre-field engineering report scope, progress payment is issued. Progress payment is less than that issued for the Season I report since most of the water and air balancing work effort is completed under Season I.