

SECTION 22 05 93
TESTING, ADJUSTING, AND BALANCING OF PLUMBING SYSTEMS

PART 1 - GENERAL

1.1 STIPULATIONS

- A. The specifications sections "General Conditions to the Construction Contract", "Special Conditions" and "Division 01 - General Requirements" form a part of this Section by this reference thereto, and shall have the same force and effect as if printed herewith in full.

1.2 SUMMARY

- A. This Section includes testing, adjusting, and balancing plumbing systems to produce design objectives, including the following:
 - 1. Reporting results of activities and procedures specified in this Section.
- B. Related Sections include the following:
 - 1. Testing and adjusting requirements unique to particular equipment, systems and components are included in the sections that specify those systems and equipment.
 - 2. Field quality-control testing to verify that workmanship quality for system and equipment installation is specified in system and equipment Sections.

1.3 DEFINITIONS

- A. Adjust: To regulate fluid flow rate at the terminal equipment and isolated system sections and loops.
- B. Balance: To proportion flows within the distribution system, including mains, submains, branches, and terminals, according to system design capacities, efficiencies and standards.
- C. Procedure: An approach to and execution of a sequence of work operations to yield repeatable results.
- D. Report Forms: Test data sheets for recording test data in logical order.
- E. System Effect: A phenomenon that can create undesired or unpredicted conditions that cause reduced capacities in all or part of a system.
- F. System Effect Factors: Allowances used to calculate a reduction of the performance ratings of a fan when installed under conditions different from those presented when the fan was performance tested.
- G. Terminal: A point where the controlled medium, such as fluid or energy, enters or leaves the distribution system.
- H. Test: A procedure to determine quantitative performance of a system or equipment.

- I. Testing, Adjusting, and Balancing Agent: The entity responsible for performing and reporting the testing, adjusting, and balancing procedures.

1.4 SUBMITTALS

- A. Quality-Assurance Submittals: Within 30 days from the Contractor's Notice to Proceed, submit 2 copies of evidence that the testing, adjusting, and balancing Agent and this Project's testing, adjusting, and balancing team members meet the qualifications specified in the "Quality Assurance" Article below.
- B. Contract Documents Examination Report: Within 45 days from the Contractor's Notice to Proceed, submit 2 copies of the Contract Documents review report as specified in Part 3 of this Section.
- C. Strategies and Procedures Plan: Within 60 days from the Contractor's Notice to Proceed, submit 2 copies of the testing, adjusting, and balancing strategies and step-by-step procedures as specified in Part 3 "Preparation" Article below. Include a complete set of report forms intended for use on this Project.
- D. Certified Testing, Adjusting, and Balancing Reports: Submit 2 copies of reports prepared, as specified in this Section, on approved forms certified by the testing, adjusting, and balancing Agent.
- E. Sample Report Forms: Submit 2 sets of sample testing, adjusting, and balancing report forms.
- F. Warranty: Submit 2 copies of special warranty specified in the "Warranty" Article below.

1.5 QUALITY ASSURANCE

- A. Agent Qualifications: Engage a testing, adjusting, and balancing agent certified by either AABC or NEBB. Agent shall function as a subcontractor responsible to the Plumbing Contractor.
- B. Testing, Adjusting, and Balancing Conference: Meet with the Client Agency's and the Architect's representatives on approval of the testing, adjusting, and balancing strategies and procedures plan to develop a mutual understanding of the details. Ensure the participation of testing, adjusting, and balancing team members, equipment manufacturers' authorized service representatives, and other support personnel. Provide 7 days' advance notice of scheduled meeting time and location.
 1. Agenda Items: Include at least the following:
 - a. Submittal distribution requirements.
 - b. Contract Documents examination report.
 - c. Testing, adjusting, and balancing plan.
 - d. Work schedule and Project site access requirements.
 - e. Coordination and cooperation of trades and subcontractors.
 - f. Coordination of documentation and communication flow.
- C. Certification of Testing, Adjusting, and Balancing Reports: Certify the testing, adjusting, and balancing field data reports. This certification includes the following:
 1. Review field data reports to validate accuracy of data and to prepare certified testing, adjusting, and balancing reports.

2. Certify that the testing, adjusting, and balancing team complied with the approved testing, adjusting, and balancing plan and the procedures specified and referenced in this Specification.
- D. Testing, Adjusting, and Balancing Reports: Use standard forms from AABC's "National Standards for Testing, Adjusting, and Balancing" or from NEBB's "Procedural Standards for Testing, Adjusting, and Balancing of Environmental Systems."
- E. Instrumentation Type, Quantity, and Accuracy: As described in AABC national standards or in NEBB's "Procedural Standards for Testing, Adjusting, and Balancing of Environmental Systems," Section II, "Required Instrumentation for NEBB Certification."
- F. Instrumentation Calibration: Calibrate instruments at least every 6 months or more frequently if required by the instrument manufacturer.

1.6 PROJECT CONDITIONS

- A. Full Client Agency Occupancy: The Client Agency may occupy the site and building during the entire testing, adjusting, and balancing period. Cooperate with the Client Agency during testing, adjusting, and balancing operations to minimize conflicts with the Client Agency's operations.

1.7 COORDINATION

- A. Coordinate the efforts of factory-authorized service representatives for systems and equipment, and other mechanics to operate plumbing systems and equipment to support and assist testing, adjusting, and balancing activities.
- B. Notice: Provide 7 days' advance notice for each test. Include scheduled test dates and times.
- C. Perform testing, adjusting, and balancing after leakage and pressure tests on water distribution systems have been satisfactorily completed.

1.8 WARRANTY

- A. General Warranty: The national project performance guarantee specified in this Article shall not deprive the Client Agency of other rights the Client Agency may have under other provisions of the Contract Documents and shall be in addition to, and run concurrent with, other warranties made by the Contractor under requirements of the Contract Documents.
- B. Project Performance Guarantee: Provide a guarantee on AABC'S "National Standards" forms or on NEBB forms stating that AABC or NEBB will assist in completing the requirements of the Contract Documents if the testing, adjusting, and balancing Agent fails to comply with the Contract Documents. Guarantee includes the following provisions:
 1. The certified Agent has tested and balanced systems according to the Contract Documents.
 2. Systems are balanced to optimum performance capabilities within design and installation limits.

PART 2 - PRODUCTS (Not Applicable)

PART 3 - EXECUTION

3.1 EXAMINATION

- A. Examine Contract Documents to become familiar with project requirements and to discover conditions in systems' designs that may preclude proper testing, adjusting, and balancing of systems and equipment.
 - 1. Identify and verify the specified system balancing devices, such as flow-adjusting control valves with flow ports, automatic adjusting and sensing valves and directional flow check valves are required and located in the Contract Documents. Verify that quantities and locations of these balancing devices. Verify and ensure the valves are accessible and appropriate for effective system balancing.
- B. Examine approved submittal data of plumbing systems and equipment.
- C. Examine equipment performance data. Relate performance data to project conditions and requirements, including system effects that can create undesired or unpredicted conditions that cause reduced capacities in all or part of a system. Calculate system effect factors to reduce the performance ratings of plumbing equipment when installed under conditions different from those presented when the equipment was performance tested at the factory.
- D. Examine system and equipment installations to verify that they are complete and that testing, cleaning, adjusting, and commissioning specified in individual Specification Sections have been performed.
- E. Examine system and equipment test reports.
- F. Examine plumbing system and equipment installations to verify that indicated balancing devices, such as flow-control valves, are properly installed, and their locations are accessible and appropriate for effective balancing and for efficient system and equipment operation.
- G. Examine systems for functional deficiencies that cannot be corrected by adjusting and balancing.
- H. Examine strainers for clean screens and proper perforations.
- I. Examine equipment for installation and for properly operating safety interlocks and controls.
- J. Report deficiencies discovered before and during performance of testing, adjusting, and balancing procedures.

3.2 PREPARATION

- A. Prepare a testing, adjusting, and balancing plan that includes strategies and step-by-step procedures.
- B. Complete system readiness checks and prepare system readiness reports. Verify the following:
 - 1. Water distribution piping systems are filled, clean, and free of air.
 - 2. Isolating and balancing valves are open and control valves are operational.

3.3 GENERAL PROCEDURES FOR TESTING AND BALANCING

- A. Perform testing and balancing procedures on each system according to the procedures contained in AABC national standards or in NEBB's "Procedural Standards for Testing, Adjusting, and Balancing of Environmental Systems" and this Section.
- B. Cut insulation for installation of test probes to the minimum extent necessary to allow adequate performance of procedures. After testing and balancing, close probe holes and patch insulation with new materials identical to those removed. Restore vapor barrier and finish according to the insulation Specifications for this Project.
- C. Mark equipment settings with paint or other suitable, permanent identification material, including valve indicators, and similar controls and devices, to show final settings.

3.4 GENERAL PROCEDURES FOR DOMESTIC WATER SYSTEMS

- A. Prepare test reports with pertinent design data and number in sequence starting at pump to end of system. Check the sum of branch-circuit flows against approved pump flow rate. Correct variations that exceed plus or minus 5 percent.
- B. Prepare schematic diagrams of systems' "as-built" piping layouts.
- C. Prepare domestic water systems for testing and balancing according to the following, in addition to the general preparation procedures specified above:
 - 1. Open all manual valves for maximum flow.
 - 2. Check that flow-control valves are set at indicated flow.
 - 3. Set system controls so automatic valves are wide open to coils.
 - 4. Check pump-motor load. If motor is overloaded, throttle main flow-balancing device so motor nameplate rating is not exceeded.
 - 5. Check air vents for a forceful liquid flow exiting from vents when manually operated.

3.5 PROCEDURES FOR DOMESTIC WATER SYSTEMS

- A. Measure water flow at pumps. Use the following procedures, except for positive-displacement pumps:
 - 1. Verify impeller size by operating the pump with the discharge valve closed. Read pressure differential across the pump. Convert pressure to head and correct for differences in gage heights. Note the point on manufacturer's pump curve at zero flow and verify that the pump has the intended impeller size.
 - 2. Check system resistance. With all valves open, read pressure differential across the pump and mark pump manufacturer's head-capacity curve. Adjust pump discharge valve until indicated water flow is achieved.
 - 3. Verify pump-motor brake horsepower. Calculate the intended brake horsepower for the system based on pump manufacturer's performance data. Compare calculated brake horsepower with nameplate data on the pump motor. Report conditions where actual amperage exceeds motor nameplate amperage.
 - 4. Report flow rates that are not within plus or minus 5 percent of design.
- B. Set flow control valves at calculated settings.

- C. Measure flow at all stations and adjust, where necessary, to obtain first balance.
 - 1. System components that have Cv rating or an accurately cataloged flow-pressure-drop relationship may be used as a flow-indicating device.
- D. Measure flow at main balancing station and set main balancing device to achieve flow that is 5 percent greater than indicated flow.
- E. Adjust balancing stations to within specified tolerances of indicated flow rate as follows:
 - 1. Determine the balancing station with the highest percentage over indicated flow.
 - 2. Adjust each station in turn, beginning with the station with the highest percentage over indicated flow and proceeding to the station with the lowest percentage over indicated flow.
 - 3. Record settings and mark balancing devices.
- F. Measure pump flow rate and make final measurements of pump amperage, voltage, rpm, pump heads, and systems' pressures.
- G. Measure the differential-pressure control valve settings existing at the conclusions of balancing.

3.6 PROCEDURES FOR MOTORS

- A. Motors, 1/2 HP and Larger: Test at final balanced conditions and record the following data:
 - 1. Manufacturer, model, and serial numbers.
 - 2. Motor horsepower rating.
 - 3. Motor rpm.
 - 4. Efficiency rating.
 - 5. Nameplate and measured voltage, each phase.
 - 6. Nameplate and measured amperage, each phase.
 - 7. Starter thermal-protection-element rating.

3.7 TOLERANCES

- A. Set plumbing system water flow rates within the following tolerances:
 - 1. Water Flow Rate: 0.50 gpm minimum to 10 percent of the system capacity.
- B. Set plumbing hot water system temperature differential between the system supply and return within the following tolerances:
 - 1. Water Temperature Differential: 5 to 10 degrees Fahrenheit.

3.8 REPORTING

- A. Initial Construction-Phase Report: Based on examination of the Contract Documents as specified in "Examination" Article, prepare a report on the adequacy of design for systems' balancing devices. Recommend changes and additions to systems' balancing devices to facilitate proper performance measuring and balancing. Recommend changes and additions to plumbing systems and general construction to allow access for performance measuring and balancing devices.

- B. Status Reports: As Work progresses, prepare reports to describe completed procedures, procedures in progress, and scheduled procedures. Include a list of deficiencies and problems found in systems being tested and balanced. Prepare a separate report for each system and each building floor for systems serving multiple floors.

3.9 FINAL REPORT

- A. General: Typewritten, or computer printout in letter-quality font, on standard bond paper, in three-ring binder, tabulated and divided into sections by tested and balanced systems.
- B. Include a certification sheet in front of binder signed and sealed by the certified testing and balancing engineer.
 - 1. Include a list of instruments used for procedures, along with proof of calibration.
- C. Final Report Contents: In addition to certified field report data, include the following:
 - 1. Pump curves.
 - 2. Manufacturers' test data.
 - 3. Field test reports prepared by system and equipment installers.
 - 4. Other information relative to equipment performance, but do not include Shop Drawings and Product Data.
- D. General Report Data: In addition to form titles and entries, include the following data in the final report, as applicable:
 - 1. Title page.
 - 2. Name and address of TAB firm.
 - 3. Project name.
 - 4. Project location.
 - 5. Architect's name and address.
 - 6. Engineer's name and address.
 - 7. Contractor's name and address.
 - 8. Report date.
 - 9. Signature of TAB firm who certifies the report.
 - 10. Table of Contents with the total number of pages defined for each section of the report. Number each page in the report.
 - 11. Summary of contents including the following:
 - a. Indicated versus final performance.
 - b. Notable characteristics of systems.
 - c. Description of system operation sequence if it varies from the Contract Documents.
 - 12. Nomenclature sheets for each item of equipment.
 - 13. Notes to explain why certain final data in the body of reports varies from indicated values.
- E. System Diagrams: Include schematic layouts of water distribution systems. Present each system with single-line diagram and include the following:
 - 1. Water flow rates.
 - 2. Pipe and valve sizes and locations.
 - 3. Balancing stations.
 - 4. Position of balancing devices.

3.10 INSPECTIONS

A. Initial Inspection:

1. After testing and balancing are complete, operate each system and randomly check measurements to verify that the system is operating according to the final test and balance readings documented in the Final Report.
2. Randomly check the following for each system:
 - a. Verify that balancing devices are marked with final balance position.
 - b. Note deviations to the Contract Documents in the Final Report.

B. Final Inspection:

1. After initial inspection is complete and evidence by random checks verifies that testing and balancing are complete and accurately documented in the final report, request that a final inspection be made by Architect.
2. TAB firm test and balance engineer shall conduct the inspection in the presence of Architect.
3. Architect shall randomly select measurements documented in the final report to be rechecked. The rechecking shall be limited to either 10 percent of the total measurements recorded, or the extent of measurements that can be accomplished in a normal 8-hour business day.
4. If the rechecks yield measurements that differ from the measurements documented in the final report by more than the tolerances allowed, the measurements shall be noted as "FAILED."
5. If the number of "FAILED" measurements is greater than 10 percent of the total measurements checked during the final inspection, the testing and balancing shall be considered incomplete and shall be rejected.
6. TAB firm shall recheck all measurements and make adjustments. Revise the final report and balancing device settings to include all changes and resubmit the final report.
7. Request a second final inspection. If the second final inspection also fails, Client Agency shall contract the services of another TAB firm to complete the testing and balancing in accordance with the Contract Documents and deduct the cost of the services from the final payment.

3.11 ADDITIONAL TESTS

- A. Within 90 days of completing TAB, perform additional testing and balancing to verify that balanced conditions are being maintained throughout and to correct unusual conditions.
- B. Seasonal Periods: If initial TAB procedures were not performed during near-peak summer and winter conditions, perform additional testing, inspecting, and adjusting during near-peak summer and winter conditions.

END OF SECTION