

**SCHOOL OF EXCELLENCE  
IN EDUCATION**

**REQUEST FOR PROPOSALS  
FOR HEAT, VENTILATION & AIR CONDITIONING (HVAC)  
EQUIPMENT MAINTENANCE**

**I. NOTICE OF REQUEST FOR PROPOSALS**

Pursuant to the provisions of Texas Education Code Section 44.031(a)(3), as amended, it is the intention of the School of Excellence in Education (“District”) to select via the Request for Proposals process a person or firm to provide maintenance services for the District’s heat, ventilation and air conditioning (“HVAC”) equipment as generally described herein. Responses to this Request for Proposals are referred to herein as “proposals”. Entities submitting proposals are referred to as “offerors” or “vendors”.

**PROPOSALS MUST BE RECEIVED NO LATER THAN  
4:00 P.M, August 20, 2018**

Proposals may be opened by the District upon receipt. Any proposal received after such time may not be considered. Proposals may be submitted by mail, courier service, facsimile transmission or electronic mail. Proposals will be received by:

Ms. Lois Butler, Director Of Facilities and Systems  
School of Excellence in Education  
1826 Basse Road  
San Antonio, Texas 89213  
Phone: 210-508-1997  
Fax: 210-582-2604  
E-mail: lbutler@excellence-sa.org

Proposal must be plainly marked as follows:

**PROPOSAL  
HVAC MAINTENANCE**

**PROPOSALS MUST BE SUBMITTED ON THE PROPOSAL FORM ATTACHED AS EXHIBIT A. THIS RFP CONTAINS REQUIRED TERMS AND DESCRIPTIVE INFORMATION ABOUT THE SERVICES. RESPONSES NOT MADE AS SET FORTH IN THE RFP MAY BE DEEMED NON-RESPONSIVE AND MAY NOT BE CONSIDERED.**

*For questions regarding this RFP, please contact **Ms. Lois Butler** the address and phone number above.*

Proposals are to include the information requested in Section IV of this RFP in the sequence and

format prescribed. In addition to and separate from the requested information, offerors submitting proposals may provide supplementary materials further describing their capabilities and experience.

The District will select a vendor from the offerors or reject all proposals.

District will rank the proposals based on the following criteria and relative weights:

	WEIGHT	CRITERIA
1.	60%	the price
2.	10%	the reputation of the offeror and of the offeror's goods or services
3.	10%	the quality of the offeror's goods or services
4.	15%	the extent to which the goods or services meet the District's needs
5.	5%	the vendor's past relationship with the District

All responses in the proposal may be used to help the District select a vendor based on these criteria. The District reserves the right to verify the accuracy and completeness of all responses by utilizing any information available to the District without regard to whether such information appears in the proposal.

## II. INSTRUCTIONS TO OFFERORS

**A. PROPOSAL FORM:** The Proposal Form attached as Exhibit A must be filed out and signed by the offeror. Submit one signed original and three copies.

**B. TIME:** Offeror agrees to hold the proposal open for acceptance for one hundred-twenty (120) calendar days from the proposal date.

**C. PROCUREMENT SCHEDULE:** The District intends to complete procurement of the services on the following schedule:

Issue Date of RFP:	7/20/18
Deadline for Receipt of Proposals:	8/20/18
Tentative Contract Award:	8/20/2018
Start Date:	9/1/2018

**D. WITHDRAWAL OF PROPOSALS:** Offerors may request permission to withdraw a proposal prior to the actual time for proposal opening. Such request must be made in person or in writing at the same location designated to receive the proposal. The District will return the proposal documents unopened at that time.

**E. WAIVER:** By submitting a proposal, each offeror agrees to waive any claim it has or may have against the District, its trustees, agents and employees, and any reference sources, arising out of or in connection with the administration, evaluation, or recommendation of any proposal; waiver of any requirements under the proposal documents; acceptance or rejection of any proposal; and award

of a contract. The District shall have no contractual obligation to any offeror, nor will any offeror have any property interest or other right in the proposal or contract being proposed unless and until the contract is unconditionally executed and delivered by all parties, and all conditions to be fulfilled by the offeror have been fulfilled by the offeror.

**F. INSURANCE:** Vendor must carry and provide proof of insurance which meets the requirements established by the District. Proof of insurance coverage must be submitted with the proposal. Insurance coverage should name the District as an additional insured. Failure to provide proof of required insurance could result in disqualification of the proposal. The following minimum coverage's are required:

Insurance Requirements	
Workers Compensation	Statutory Limits
Employers Liability	\$500,000 each accident \$500,000 policy limit \$500,000 each employee
General Liability/Bodily	
Injury	\$500,000 combined single/limits
Property damage	\$1,000,000 aggregate
Automotive Liability	\$250,000 each person/\$500,000 each accident
Property damage	\$250,000

**G. CRIMINAL HISTORY RECORD CHECKS.** Vendor will, at least annually, obtain criminal history record information that relates to an employee, applicant, agent or subcontractor of vendor or a subcontractor of vendor, if the person has or will have continuing duties related to the contract, and the duties are or will be performed on the District's property or at another location where students are regularly present. Vendor shall assume all expenses associated with the background checks, and shall immediately remove any employee or agent who was convicted of a felony or a misdemeanor involving moral turpitude from the District's property or other location where students are regularly present. The District shall determine what constitutes "moral turpitude" or "a location where students are regularly present".

**H. ADDITIONAL PROVISIONS:**

1. The District is exempt from state sales tax.
2. All services shall be performed in accordance with the federal Occupational Safety and Health Act.
3. All information, documentation, and other materials submitted in response to this request for proposals is considered non-confidential and/or non-proprietary and is subject to public disclosure under the Texas Public Information Act (Texas Government Code, Chapter 552.001, *et seq.*) after the solicitation is completed.
4. The District does not discriminate on the basis of race, religion, color, creed, sex, national origin, age, political beliefs or disability in its educational programs, employment practices and procurement processes. The offeror, by submitting a proposal, commits that it has a similar policy, and will comply with the District's non-discrimination policy.

**I. OTHER INFORMATION:** The District believes the information included in this RFP is materially accurate, however, the District does not warrant this information to be free from errors or omissions. Offerors are encouraged to inspect the premises prior to submitting a response.

**J. THE OFFEROR MUST SUBMIT THE FOLLOWING ITEMS:**

“Proposal Form”, Exhibit A, signed by offeror.

“Responses to Information to be Provided by Offerors”, Section IV, signed by offeror.

**III.SCOPE OF WORK**

**A. Term.** The term of the agreement shall be one year.

**B. Locations.** Services will be performed at the following locations:

- 1826 Basse Rd
- 1830 Basse Rd
- 802 Oblate
- 5703Blanco Rd
- 3711 Captitol St

**C. Services.** Supply labor and material for the following at each of the above locations:

DESCRIPTION	FREQUENCY
Check refrigerant charge, charge as necessary	annually (Spring)
Flush out primary condensate drain	twice a year Fall and Spring
Check and clean condenser coils (wash inside coils)	annually
Check operating amperages	twice a year (Spring and Fall)
Check temperature differential and indoor coil	twice a year (Spring and Fall)
Check indoor blower assembly	twice a year (Spring and Fall)
Lubricate as necessary	twice a year (Spring and Fall)
Check thermostat for proper operation	twice a year (Spring and Fall)
Check unit disconnect/wiring	twice a year (Spring and Fall)
Check safety controls	twice a year (Spring and Fall)
Check ignition, light pilot if necessary	annually (Fall)
Check heat exchange for holes or cracks	annually (Fall)
Check/clean light burners and adjust if needed	annually (Fall)
Check for combustion	annually (Fall)
Check heating auxiliary items	annually (Fall)

**D. Additional Services.** In addition to the services described in section III.C above, the District may request vendor to perform additional maintenance services on the basis of hourly rates submitted as required on the Proposal Form.

## IV. INFORMATION TO BE PROVIDED BY OFFERORS

Please provide the following information concerning your firm:

### A. Offeror Information

1. Name of Firm
2. Business Address
3. Telephone Number
4. Fax Number
5. Type of Organization (Individual, Partnership, Corporation, Association)
6. Number of Permanent Employees. (Employees hired for the duration of a specific project or under a fixed-term contract are not considered permanent employees for purposes of this proposal).
  - i. Home Office
  - ii. Field
7. Primary Contact Person for District inquiries
8. Main Office Location (if different than above)
9. Describe and substantial changes in ownership of your firm during the past five years.
10. How many years has your firm operated under its current form of business organization?
11. List all professional or industry organizations in which your firm or its principals are members.
12. In order to assist the District in determining whether there exist any conflicts of interest, please describe any business or family relationships between any member of the Board of Directors of the District and:
  - i. your firm;
  - ii. any principal of your firm;
  - iii. any subcontractor you are considering using to perform any portion of the project work; or,
  - iv. any principal of such subcontractor.

### B. Personnel Information. Provide brief resumes (2 page limit) for the persons listed below:

1. Principals/ Corporate Officers:
  - President
  - Vice President(s)
  - Partners
  - Primary manager of HVAC maintenance services for the District

### C. School Services. List all schools, school districts or charter schools your firm has provided HVAC maintenance services for within the past five years. For each school, list:

1. Client, Client Contact Person, and Telephone Number
2. Duration of services

### D. Non-Educational Services (Optional). List up to five non-school district clients your firm has provided HVAC maintenance services for within the past five years. For each client, list:

1. Client, Client Contact Person, and Telephone Number
2. Duration of services

**E. Organization**

1. Describe the most common problem or challenge which you have encountered in school HVAC maintenance and your method for addressing the issue. (Maximum 2 page).
2. Describe your firm's concepts for working in a team relationship with the Owner (Maximum 2 Page).
3. List the classifications of work or trades which you anticipate performing with in-house forces.

**F. Claims and Litigation**

1. Identify any claims or suits, if any, brought against your firm within the last five years.
2. Describe all instances in which your firm was unable to complete the work under a contract.
3. Identify any judgments, claims arbitration proceedings or suits pending or outstanding against your firm or its officers.
4. Identify any lawsuits filed or arbitration requested by your firm with respect to construction contracts of your firm.

**G. Current Work Load.** Provide the following information for the five largest current HVCA Maintenance contracts:

1. Owner
2. Location of facilities
3. Current Annual Contract Amount

**H. Financial Information**

1. Total amount of HVAC maintenance work performed for each of the past five years.
2. Bank reference(s).
  - i. Individual, Title
  - ii. Name of Bank
  - iii. Address
  - iv. Telephone
3. Dunn & Bradstreet rating, if available

**I. Execution.** The foregoing is true and correct. The District, or any authorized representative of the District, is authorized by the undersigned to contact any firm, institution, or person listed above to obtain information about our firm's services, financial condition, and any other information which the District might determine as being desirable.

Offeror: \_\_\_\_\_

By: \_\_\_\_\_

(Signature)

Printed name: \_\_\_\_\_

Title: \_\_\_\_\_

**EXHIBIT A**

**PROPOSAL FORM**

**IDENTIFICATION OF OFFEROR  
AND ACCEPTANCE OF TERMS**

**IMPORTANT: A proposal, to be valid, must be manually signed in ink by an authorized person in the space provided. By such signature, offeror agrees to strictly abide by the terms, conditions, and specifications set out in the Request for Competitive Sealed Proposal.**

Entity, Company or Firm Name: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone #: \_\_\_\_\_

Fax: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

**ANNUAL FEE PROPOSAL AMOUNT: \$** \_\_\_\_\_

\_\_\_\_\_ DOLLARS

**HOURLY RATES including all labor burden, overhead and profit:**

**Craft**

**Rate per hour**

\_\_\_\_\_

\$ \_\_\_\_\_

\_\_\_\_\_

\$ \_\_\_\_\_

\_\_\_\_\_

\$ \_\_\_\_\_

\_\_\_\_\_

\$ \_\_\_\_\_

**Walkthroughs of campuses will be held on August 7, 2017 from 10-11 or can be arranged by scheduling through Ms. Butler via email [lbutler@excellence-sa.org](mailto:lbutler@excellence-sa.org).**