

SOLICITATION FOR:

**Talawanda School District Multi-Site
HVAC Preventative Maintenance
Agreement**



**Date Issued: Tuesday, April 16, 2024
Request for Quote**

Overview:

Talawanda School District is seeking competitive proposals from qualified and reliable contractors to provide Preventative Maintenance services for equipment at five schools in accordance with the procedures described in the attached Scope of Work (SOW – Attachment A) and in accordance with the original equipment manufacturer (OEM) specifications and recommendations. Seeking proposals for a 1 year and a 3 year contract. The following school locations are to be covered under this agreement:

Talawanda High School
5301 University Park Blvd
Oxford, OH 45056

Talawanda Middle School
4030 Oxford Reily Road
Oxford, OH 45056

Kramer Elementary
400 W. Sycamore Street
Oxford, OH 45056

Marshall Elementary
3260 Oxford Millville Rod
Oxford, OH 45056

Bogan Elementary
5200 Hamilton Richmond Road
Oxford, OH 45056

An asset list detailing the equipment to be maintained for each school location can be found in **Attachment B**. The required maintenance procedures associated with each asset, or piece of equipment, can be found in the Scope Of Work (**Attachment A**). The requirements listed in Attachment A are to be completed as well as any additional maintenance recommendations listed by the OEM specifications and recommendations.

Talawanda School District is a tax-exempt entity. Proposals are not to contain any consideration with respect to Federal Excise, State Sales, or other taxes. Talawanda School District will furnish a tax exempt certificate to the successful vendor/contractor awarded this contract

Bid/Bidder Requirements:

Vendors/contractors are required to submit their sealed Offers in accordance with the following expressed conditions:

1. Vendor/Contractor's technical proposal must respond to every section for the RFQ set forth herein. Failure to respond to every section in a clear and concise manner may make the proposal non-responsive and result in the rejection of the proposal.
2. The successful vendor/contractor must certify that they are licensed by the state of Ohio to complete the work associated with this bid (Master HVAC License number).
3. Vendor/contractors that qualify their offers by requiring alternate contractual terms and conditions as a stipulation for contract award must include such alternate terms and conditions in their offers. Talawanda School District reserves the right to declare vendor/contractor's offers as non-responsive if any of these alternate terms and conditions are in conflict with the conditions listed herein, or if they are not in the best interest of Talawanda School District.
4. Vendor/contractors are required to state exactly what they intend to furnish to Talawanda School District via this solicitation and must indicate any variances to the terms, conditions, and specifications of this solicitation no matter how slight. If variations are not stated in the vendor/contractor's offer, it shall be construed that the vendor/contractor's offer fully complies with all conditions identified within this solicitation.
5. Talawanda School District intends and expects that the contracting processes of Talawanda School District and its vendors/contractors provide equal opportunity without regard to race, gender, ethnicity, religion, age, sexual preference, or disability and that its contractors/vendors make available equal opportunities to the extent that third parties are engaged to provide goods and services to Talawanda School District As sub-contractors, vendors, or otherwise. Accordingly, the vendor/contractor shall not discriminate on any of the foregoing grounds in the performance of the contract and shall make available equal opportunities to the extent third parties are engaged to provide goods and services in the connection with the performance of the contract.
6. During the agreement and for such additional time as may be required, vendor/contractor shall provide, pay for, and maintain in full force and effect, the insurance coverages listed in this document. Insurance shall cover the vendor/contractor's activities, those of any and all subcontractors, and those activities of anyone directly or indirectly employed by the vendor/contractor or subcontractor(s).

Insurance Requirements:

In part to assure Talawanda School District the vendor/contractor is always capable of fulfilling the specified indemnification obligations, the contractor must purchase and maintain insurance of the kind and in the minimum amounts specified in this document. Vendor/contractor agrees to procure and maintain, at its own expense, for all work covered by this agreement, the following policies of insurance:

Worker’s Compensation Insurance to cover obligations imposed by applicable laws for any employee engaged in the performance of work under this agreement:

Worker’s Compensation

Each accident – Statutory

Each employee for disease – Statutory

Vendor/contractor shall comply with all requirements of Ohio Worker’s Compensation Laws and shall provide Worker’s Compensation Insurance to protect the vendor/contractor from and against any and all worker’s compensation claims arising from performance of work under the agreement. The requirements of this provision shall apply to the vendor/contractor and to all subcontractors.

Commercial General Liability Insurance with minimum combined single limits of one million dollars (\$1,000,000) each occurrence and one million dollars (\$1,000,000) aggregate. The policy shall be applicable to all premises and operations. The policy shall include coverage for bodily injury, broad form property damage (including completed operations), personal injury (including coverage for contractual and employee acts) blanket contractual, independent contractors, products, and completed operations. The policy shall contain a severability of interest provision. Coverage must be on an “occurrence” basis as opposed to a “claims made” basis. This insurance must pay on behalf of the contractor all sums which the vendor/contractor shall become legally obligated to pay as damages because of bodily injury or property damage caused by an occurrence up to the specified limits of liability of each occurrence.

Commercial Automobile Liability Insurance with minimum combined single limits for bodily injury and property damage of not less than One Million Dollars (\$1,000,000) each occurrence with respect to each of the vendor/contractor’s owned, hired and non-owned vehicles assigned to or used in performance of the services. The policy shall contain a severability of interest provision. Commercial Automobile Liability insurance must cover the vendor/contractor for all sums which the vendor/contractor shall become legally obligated to pay as damages because of bodily injury or property damage caused by an occurrence up to the specified limits of liability of each occurrence. This insurance coverage must extend to all levels of subcontractors. Such coverage must include all automotive equipment used in the performance of the agreement, both on and off the work site, and must include non-ownership and hired cars coverage.

The above-mentioned insurance shall be procured and maintained with insurers with an A- or better rating, as determined by Best’s Key Rating Guide. All coverage shall be

continuously maintained to cover all liability, claims, demands, and other obligations assumed by the vendor/contractor.

The policies required above shall be primary insurance, and any insurance carried by Talawanda School District, its Directors, or its employees shall be excess and not contributory insurance to that provided by vendor/contractor. No additional insured endorsement to the policy required above shall contain any exclusion for bodily injury or property damage arising from completed operations. The vendor/contractor shall be solely responsible for any deductible losses under any policy required above.

The Commercial General Liability and Commercial Automobile Liability policies shall be endorsed to name Talawanda School District, and its Trustees, Directors, employees and agents as additional insured. When Worker's Compensation and Professional Liability are required, a certificate should be provided as evidence of such coverage. The policies shall provide that Talawanda School District will receive notice no less than 30 days prior to cancellation, termination or material change to the policies.

The vendor/contractor shall not be relieved of any liability, claims, demands, or other obligations assumed pursuant to the agreement by reason of its failure to procure or maintain insurance, or by reason of its failure to procure or maintain insurance in sufficient amounts, durations or types.

Failure on the part of the vendor/contractor to procure or maintain policies providing the required coverage, conditions and minimum limits shall constitute a material breach of contract upon which Talawanda School District may immediately terminate this agreement, or at its discretion, Talawanda School District may procure or renew any such policy or any extended reporting period thereto and may pay any and all premiums in connection therewith, and all monies so paid by Talawanda School District shall be repaid by the vendor/contractor to Talawanda School District upon demand, or Talawanda School District may offset the cost of the premiums against any monies due to the vendor/contractor from Talawanda School District.

Insurance Certificates:

Prior to commencing services, the vendor/contractor shall deliver to Talawanda School District certificates of insurance as evidence that the policies providing any and all required coverage and limits are in full force and effect. These certificates will serve as an indication to Talawanda School District that the vendor/contractor has acquired all necessary insurance. However, Talawanda School District may require that certified copies of the insurance policies be submitted and may withhold payment for services until the applicable insurance policies are received and found to be in accordance with the agreement.

Insurance limits must be on each Certificate of Insurance. Each Certificate of Insurance shall be reviewed and approved by Talawanda School District prior to commencement of services under the agreement. The certificates shall identify this agreement and shall state the project number where applicable.

Worker's Compensation Insurance: Each vendor/contractor and subcontractor shall maintain at its own expense until completion of its work and acceptance thereof by Talawanda School District Worker's Compensation Insurance, including occupational disease provisions, covering the obligations of the vendor/contractor or subcontractor in accordance with the provisions of the laws of the State of Ohio. The vendor/contractor shall furnish Talawanda School District with a certificate giving evidence that it is covered by the Worker's Compensation Insurance herein required, each certificate specifically stating that such insurance includes occupational disease provisions and provisions preventing cancellation without thirty (30) days' prior written notice to Talawanda School District.

Indemnity:

The successful vendor/contractor shall indemnify and hold Talawanda School District harmless from any and all claims, liabilities, losses and causes of action which may arise out of the fulfillment of the vendor/contractor's contractual obligations as outlined in this solicitation. The vendor/contractor shall pay all claims and losses of any nature whatever in connection therewith, and shall defend all suits, in the name of Talawanda School District when applicable, and shall pay all costs and judgments which may issue thereon.

Submission Of Offers:

The original offer must be sent in a sealed envelope and received before the due date and time as specified in this RFQ. The vendor/contractor is responsible for addressing the envelope as indicated below. If the bid arrives late, it will be returned unopened. Please address the envelope as follows:

RE:

Talawanda School District – Multi-site HVAC Preventative Maintenance Agreement
Mr. Bill Hubbard
Director of Facilities
Talawanda School District
131 W. Chestnut Street
Oxford, OH 45056

Each proposal shall consist of an original hard copy (marked as such) and three (3) copies. Along with the response, please include a contact that we may use if we have questions about any of the information received. Also provide a copy of the required state issued Master Mechanical/HVAC license, a list of three references with facilities/systems similar to Talawanda School District, and copies of all required insurance policies.

All proposals become the property of Talawanda School District. Proprietary or confidential material must be clearly identified and easily separable from the rest of the proposal.

A proposal submitted in response to the RFQ shall constitute a binding offer, and the contents of the proposal of the successful bidder will become contractual obligations. Pricing must be firm for 180 days from the date of submission. Cost is an issue, but not at the expense of quality of work and timeliness of service. If the successful proposer fails to accept all the terms and conditions set forth in the RFQ in a contract, the award may be cancelled.

Proposed pricing for services must be provided on the Quote Submission Form (**Attachment C**). Pricing must include the pricing for routine Preventative Maintenance services which shall be inclusive of all time and materials required to perform the routine Preventative Maintenance detailed in this RFQ. By submitting the Quote Submission Form you agree to the requirements listed in this RFQ and that your offer is valid for 180 days from the date of submission, and may be accepted at any time by Talawanda School District, thereby creating a valid contract on the terms and conditions described in this RFQ.

The attached Scope Of Work (**Attachment A**) as well as any additional OEM specifications/requirements constitutes the minimum work to be performed. Any exceptions or additions are to be noted and highlighted in your response, and will become part of the contract upon award. Additional work should also be priced out and explained in, or as an attachment to, the Quote Submission Form.

Talawanda School District fully expects the services provided as part of this agreement to be "Turn-Key" in nature. The successful contractor/vendor awarded this agreement is to provide all equipment, chemicals, refrigerant, labor, scheduling/office staff, supplemental heating/cooling equipment, tools, and material to complete the Preventative Maintenance items listed in this RFQ.

Changes To Submitted Offers:

Offers may only be modified in the form of a written notice on company letterhead and must be received prior to the time and date set for the offers to be opened. Each modification submitted to Talawanda School District must have the vendor/contractor's name and return address and the applicable solicitation title clearly marked on the face of the envelope. If more than one modification is submitted, the modification bearing the latest date of receipt by Talawanda School District will be considered the valid modification.

Offers may be withdrawn prior to the time and date set for the opening. Such requests must be made in writing on company letterhead.

Talawanda School District may make such investigations as deemed necessary to determine the ability of the contractor/vendor to perform work, and the contractor/vendor shall furnish all information and data for this purpose as Talawanda School District requests. Talawanda School District reserves the right to reject any bid if the evidence submitted by, or investigation of, such vendor/contractor fails to satisfy Talawanda School District that such vendor/contractor is properly qualified to carry out the

obligations of the contract and to complete the work contemplated therein. Conditional bids will not be accepted.

The award will be made to that offeror whose proposal is determined to be most advantageous to Talawanda School District, price and other factors considered, subject to negotiation and execution of an acceptable contract. Other evaluation criteria shall include, but not be limited to: compliance with the RFQ, reliability and experience of the vendor, qualifications of the project manager(s), and timeliness.

Talawanda School District reserves the right to cancel this RFQ at any time, without penalty. Talawanda School District is not liable for any cost incurred by the vendor/contractor during the planning and preparation of the reply to this RFQ.

The proposal must be complete, understandable, and address all the points included in this RFQ. Any work performed by subcontractors must be identified. If the bidder is a subsidiary of another company, the parent company, its contact information and tax ID number must be included.

Note: All Boiler Preventive Maintenance work will be performed on an annual basis and all Chiller Preventative Maintenance work will be performed on a semi-annual basis.

Schedule Of Activities:

The following activities and dates are an outline of the process to be used to solicit contractor/vendor responses and to evaluate each proposal:

Tuesday, April 16, 2024: *Issue Request for Quote* To be advertised online. RFQ and all attachments will be available on the Talawanda School District website.

Monday, April 22, 2024 – Friday, April 26, 2024: *Site Visits* scheduled if needed for Potential Bidders. All site visits are to be scheduled with Bill Hubbard (hubbardb@talawanda.org)

Tuesday, May 7, 2024: *Bid due* by 10 am – Bid Opening will be at 10:30 am on Tuesday, May 7, 2024.

Attachment A (Scope of Work)

Note: All HVAC Preventative Maintenance procedures/services provided shall meet the requirements listed in this attachment (Scope Of Work) and shall meet all requirements listed by each of the individual equipment manufacturers. Documentation detailing services rendered to each piece of equipment shall be generated at time of service and provided to Talawanda School District. Documentation shall be stored by the vendor/contractor awarded this contract for the life of the agreement. This documentation shall be the property of Talawanda School District.

Boiler Systems/DHW Boilers (Annual Basis)

Talawanda High School (1) HW Boiler, (5) DHW boilers, (1) Steamer

Talawanda Middle School (3) HW boilers, (2) DHW boilers

Bogan Elem (2) HW boilers, (2) DHW boilers

Kramer Elem (2) HW boilers, (2) DHW boilers

Marshall Elem (2) HW boilers, (2) DHW boilers

Scope of Work:

- Pull pilot assemblies and clean and inspect
- Check electrical connections and contacts
- Check blower motors and clean wheels as necessary
- Check all burner linkage for wear
- Check gas train for leaks
- Check combustion air damper operation and lube
- Start boilers and check all safeties
- Perform combustion analysis on burners
- Check pumps and water pressures

Chiller Systems (Semi-Annual Basis)

Talawanda High School: Multi Stack Chiller - Model# MS70X6H2RO

Scope of Work - Summer:

- Check operation of 8 modules 2 compressors per module
- Check and inspect compressor contactors
- Check electrical connections and contacts
- Check compressor windings
- Refrigerant leak check modules and report findings
- Clean and fill cooling tower
- Check fan belts and adjust as necessary
- Grease fan motor and basin pump
- Check pump/ fan motor starters
- Check operation of tower
- Check operation of pumps (2) CHW, (2) HW, (2) GEO LOOP
- Grease pumps and check couplers on each pump.
- Check alignment

Scope of Work - Fall:

- Check operation of 8 modules
- Check and inspect compressor contactors
- Check electrical connections and contacts
- Refrigerant leak check modules and report findings
- Valve off water to cooling tower and drain
- Turn off basin pump disconnect
- Check operation of pumps (2) CHW, (2) HW, (2) GEO LOOP
- Grease pumps and check couplers on each pump.
- Check alignment

Talawanda Middle School: York Chiller – Model# YCAS0360 Serial # RENM008428

Scope of Work - Summer:

- Clean condenser coils
- Check condenser fan motors/ blades
- Check condenser fan contractors and VFDs
- Check all electrical connections and contacts
- Refrigerant leak check chiller report findings
- Check compressor electrical connections and contacts
- Check compressor windings
- Collect oil sample on each screw compressor and send to lab for analysis and report
- Start chiller and check operation
- Check Operation CHW

- Check and grease chilled water pumps
- Check pump motor starters and contacts
- Check couplers and alignment

Scope of Work - Fall:

- Check system pressures
- Check and grease chilled water pumps
- Check alarm history
- Check compressor crank case heaters and barrel heaters
- Check glycol freeze point and record
- Check Operation CHW

Bogan Elem: 2 York Chillers – Model# YCAL0104

Scope of Work - Summer:

- Clean condenser coils
- Check condenser fan motors/ blades
- Check condenser fan contractors and VFDs
- Check all electrical connections and contacts
- Refrigerant leak check each circuit and report findings
- Check compressor electrical connections and contacts
- Check compressor windings
- Check Operation CHW
- Start chiller and check operation
- Check and grease chilled water pumps
- Check couplers and alignment
- Check pump motor starters and contacts
- Check pump VFD's

Scope of Work - Fall:

- Check system pressures
- Rotate pumps
- Check and grease chilled water pumps
- Check alarm history
- Check compressor crankcase heaters and barrel heaters
- Check glycol freeze point and record
- Check Operation CHW

Kramer Elem: Smardt Chiller - Model# SLA054-2BG06-F3AEHA-A008XA-010 Serial# FF0010LQ1899

Scope of Work - Summer:

- Clean condenser coils
- Check condenser fan motors/ blades
- Check condenser fan contractors and VFDs
- Check all electrical connections and contacts
- Refrigerant leak check chiller and report findings
- Check compressor electrical connections and contacts
- Check compressor windings
- Check Operation CHW
- Start chiller and check operation
- Check and grease chilled water pumps
- Check couplers and alignment
- Check pump motor starters and contacts
- Check pump VFD's

Scope of Work - Fall:

- Check system pressures
- Check and grease chilled water pumps
- Check alarm history
- Check Operation CHW

**Marshall Elementary: Smardt chiller – Model# AD028-1BG06-F4AEBA-A006AA-E10
Serial# FF0010P329Q2955**

Scope of Work - Summer:

- Clean condenser coils
- Check condenser fan motors/ blades
- Check condenser fan contractors and VFDs
- Check all electrical connections and contacts
- Refrigerant leak check chiller and report findings
- Check compressor electrical connections and contacts
- Check compressor windings
- Check Operation CHW
- Start chiller and check operation
- Check and grease chilled water pumps
- Check couplers and alignment
- Check pump motor starters and contacts
- Check pump VFD's

Scope of Work - Fall:

- Check system pressures
- Check and grease chilled water pumps
- Check alarm history
- Check compressor crank case heaters and barrel heaters
- Check glycol freeze point and record
- Check Operation CHW

Attachment B (Asset Listing)

TALAWANDA DISTRICT BOILER LIST

Talawanda High School
5301 University Park Blvd
Oxford, OH 45056

MANUFACTURE	YR. BUILT	TYPE	MODEL	SERIAL No.
Cleveland – Steamer	2011	Gas	36CM1648	116117
Lochinvar	2010	Gas	TNA251-100	106767
Lochinvar – DWH	2022	Gas	SWR200N ser-100	2202127750013
Lochinvar – DWH	2021	Gas	SWR200N ser-100	2202127700393
Lochinvar – DWH	2023	Gas	SWR125N ser-100	2315133615209
Lochinvar – DWH	2018	Gas	SNR126-065	1848112681839
Lochinvar – DWH	2018	Gas	SNR126-065	1841112123746

Talawanda Middle School
4030 Oxford Reily Rd
Oxford, OH 45056

MANUFACTURE	YR. BUILT	TYPE	MODEL	SERIAL No.
Lochinvar	2020	Gas	FBN2001	20358944
Lochinvar	2020	Gas	FBN2001	20359196
Lochinvar	2020	Gas	FBN2001	20359194
Lochinvar – DWH	2020	Gas	SWA285N	201700095
Lochinvar – DWH	2020	Gas	SWA285N	201700079

Bogan Elementary
5200 Hamilton Richmond Rd
Oxford, OH 45056

MANUFACTURE	YR. BUILT	TYPE	MODEL	SERIAL No.
King	2006	Propane	TC-08	
King	2006	Propane	TC-08	
Lochinvar – DWH	2016	Propane	AWN501PM	155000548
Lochinvar – DWH	2015	Propane	AWN200PM	3515101935104

**Kramer Elementary
400 W. Sycamore St
Oxford, OH 45056**

MANUFACTURE	YR. BUILT	TYPE	MODEL	SERIAL No.
Hoval-CleaverBrooks	2015	Gas	CFC-700	110393
Hoval-CleaverBrooks	2015	Gas	CFC-700	110394
Lochinvar – DWH	2015	Gas	AWN200PM	154912284773
Lochinvar – DWH	2015	Gas	AWN200PM	154912284775

**Marshall Elementary
3260 Oxford Millville Rd
Oxford, OH 45056**

MANUFACTURE	YR. BUILT	TYPE	MODEL	SERIAL No.
CleaverBrooks	2021	Gas	CFC-E	604369500210
CleaverBrooks	2021	Gas	CFC-E	604369500209
AO Smith – DWH	2000	Gas	XWH200NP ser-100	2045 121662088
AO Smith – DWH	2000	Gas	XWH200NP ser-100	2045 121662087

TALAWANDA DISTRICT CHILLER LIST

Talawanda High School
5301 University Park Blvd
Oxford, OH 45056

MANUFACTURE	YR. BUILT	MODEL	SERIAL No.
Multi Stack	2011	MS70X6H2RP	

Talawanda Middle School
4030 Oxford Reily Rd
Oxford, OH 45056

MANUFACTURE	YR. BUILT	MODEL	SERIAL No.
York	1989	YCAS0360	RENM008428

Bogan Elementary
5200 Hamilton Richmond Rd
Oxford, OH 45056

MANUFACTURE	YR. BUILT	MODEL	SERIAL No.
York (Quantity 2)	2006	YCAL0104	

Kramer Elementary
400 W. Sycamore St
Oxford, OH 45056

MANUFACTURE	YR. BUILT	MODEL	SERIAL No.
Smardt	2015	AD028-1BG06-F4AEBA-008XA-010	FF0010LQ1899

Marshall Elementary
3260 Oxford Millville Rd
Oxford, OH 45056

MANUFACTURE	YR. BUILT	MODEL	SERIAL No.
Smardt	2021	AD028-1BG06-F4AEBA-006AA-E10	FF0010P329Q2955

Attachment C (Quote Submission Form)

PROPOSAL: Talawanda SD HVAC Preventative Maintenance Agreement

TALAWANDA SD CONTACT: Bill Hubbard; hubbardb@talawanda.org

RESPONDING CONTRACTOR/VENDOR INFORMATION:

Company _____

Address _____

City, State, Zip _____

Phone _____ E-mail _____

Authorized signature _____

Printed name, title _____

Signature acknowledges that the Proposer:

- Has reviewed all instructions, specifications, terms and conditions in the RFQ to ensure that this proposal complies.
- Is able to and will meet all insurance requirements set forth in the RFQ and has provided requested documentation.
- Is able to and will fulfill the obligations in accordance with the Scope of Work and other specifications, terms and conditions.
- Has included the following in the proposal:
 - All state, county, and local licenses and/or certificates to prove the vendor's qualifications in HVAC installation, maintenance, and repair.
 - At least three (3) references for which your firm provided maintenance services for equipment similar to that found in Attachment B.

PREVENTATIVE MAINTENANCE PRICING INFORMATION FOR 5 SCHOOL LOCATIONS:

**Talawanda High School
5301 University Park Blvd
Oxford Ohio 45056**

Preventative Maintenance: \$ _____ 1 year contract

Preventative Maintenance: \$ _____ 3 year contract

**Talawanda Middle School
4030 Oxford Reily Rd
Oxford Ohio 45056**

Preventative Maintenance: \$ _____ 1 year contract

Preventative Maintenance: \$ _____ 3 year contract

**Bogan Elementary
5200 Hamilton Richmond Rd
Oxford Ohio 45056**

Preventative Maintenance: \$ _____ 1 year contract

Preventative Maintenance: \$ _____ 3 year contract

**Kramer Elementary
400 W. Sycamore St
Oxford Ohio 45056**

Preventative Maintenance: \$ _____ 1 year contract

Preventative Maintenance: \$ _____ 3 year contract

**Marshall Elementary
3260 Oxford Millville Rd
Oxford Ohio 45056**

Preventative Maintenance: \$ _____ 1 year contract

Preventative Maintenance: \$ _____ 3 year contract