

October 16, 2023

This Request for Proposal (RFP) will provide your firm with sufficient information to enable you to prepare and submit a proposal for a three-year contract for HVAC preventive maintenance and repair services for The Lehigh Valley Charter High School for the Arts, Inc. (Charter Arts), located at 321 East 3rd Street Bethlehem, PA, 18015.

Charter Arts aims to acquire the services of a qualified organization to provide HVAC maintenance and repair services to our School. This bid is posted to the Charter Arts website at [www.charterarts.org](http://www.charterarts.org).

Potential Proposers should email [bfilchner@charterarts.org](mailto:bfilchner@charterarts.org) to inform Charter Arts of its intent to respond. To provide intent to submit a bid, please provide Charter Arts with an email detailing the point of contact for your organization's bid process and include their name, title, address, telephone and email address.

This RFP includes a preliminary scope of work and general terms and conditions for any subsequent contract. The scope of services, as defined herein, may be modified after final selection of the Contractor. The general terms and conditions are part of any submitted proposal and will be incorporated into any subsequent contract. Submission of a proposal shall constitute acceptance of these terms and conditions. Conditional responses may be rejected.

In order for your RFP to be considered responsive, it must adhere to the submittal requirements that follow. The Contractor will be selected based on the qualification and best value of services provided and overall cost of the project and contract. It is a goal of Charter Arts to promote local and minority-owned business participation in all construction and service contracts.

Questions concerning the proposed contract terms and conditions should be submitted to [bfilchner@charterarts.org](mailto:bfilchner@charterarts.org) so they can be addressed in a timely manner.

#### Mission Statement

*The Lehigh Valley Charter High School for the Arts provides a unique environment that fosters a creative, rigorous academic approach to learning and a development of talents in the arts. Built on passion, discipline and a commitment to excellence, this integrative educational experience inspires all students to believe in who they are and in what they can accomplish.*

## RFP Table of Contents

[INTRODUCTION](#)

[REQUEST FOR PROPOSALS](#)

[INSURANCE REQUIREMENTS](#)

[SCOPE OF WORK- STANDARDS AND SPECIFICATIONS](#)

[SERVICES TO BE PROVIDED](#)

[ITEMS COVERED UNDER AGREEMENT](#)

## **INTRODUCTION**

Charter Arts is currently seeking a contract for maintenance and repair of heating, ventilating, and air conditioning systems and components in its building ([see attachment A Equipment List](#)).

**Charter Arts is seeking proposals to provide services at a fixed rate for the period November 17, 2023 to June 30, 2024 AND beginning July 1, 2024 and expiring June 30, 2025.** Proposals should include that the contract may be terminated by either party upon a 90-day certified letter notice for any reason.

## **REQUEST FOR PROPOSALS**

Charter Arts is seeking a well-qualified firm to provide a comprehensive heating ventilation-air conditioning HVAC maintenance and repair program.

The work will include the provision of a total maintenance/management program including, but not limited to, the inspection, periodic/preventative maintenance, repairs, service calls and other tasks and services necessary to ensure safe, well-maintained HVAC systems providing quality air for Charter Arts. Qualified bidders must have the ability and sufficient resources to provide repairs and servicing of all HVAC equipment, including: preventive maintenance, responding to emergencies within two hours, finishing repairs in a timely manner, troubleshooting problems, repairs, replacements of HVAC systems, and engineering and related services when needed.

Systems and components to be serviced include forced air handlers, circulation pumps, exhaust fans, control systems, variable frequency drives (VFDs), gas furnace, cooling towers, water source heat pumps, mini-splits, rooftop AC units and other HVAC components.

This is an invitation to submit HVAC preventive maintenance and repair services proposals. Charter Arts is open to proposals submitted by all individuals, businesses, organizations, and collaborations of varied parties.

## **INSURANCE REQUIREMENTS**

Before commencing any work, the CONTRACTOR shall procure insurance in the CONTRACTOR'S name and maintain all insurance policies for the duration of the contract of the types and in the amounts listed. The insurance shall provide coverage against claims for injuries to persons or damages to property which may arise from operations or in connection with the performance of the work hereunder by the CONTRACTOR, his agents, representatives, employees, or subcontractors, whether such operations by himself/herself or anyone directly or indirectly employed by him/her.

### **(a) COMMERCIAL GENERAL LIABILITY**

(1) CONTRACTOR shall maintain Commercial General Liability (CGL) and, if necessary, Commercial Umbrella Liability insurance with a total limit of not less than \$1,000,000.00 each occurrence for bodily injury and property damage. If such CGL insurance contains a general aggregate limit, it shall apply separately to this project/location or the general aggregate shall be twice the required limit.

(2) CGL insurance shall be written on Insurance Services Office (ISO) "occurrence" form CG 00 01 covering Commercial General Liability or its

equivalent and shall cover the liability arising from premises, operations, independent contractors, products-completed operations, personal and advertising injury, and liability assumed under an insured contract (including the tort liability of another assumed in a business contract).

(3) Charter Arts, its officers, officials, agents, and employees are to be covered as additional insureds during and until completion of the work, under the CGL by endorsement CG 20 10 or an endorsement providing equivalent coverage as respects to liability arising out of activities performed by or on behalf of the CONTRACTOR; premises owned, leased or used by the CONTRACTOR; and under the commercial umbrella, if any. The coverage shall contain no special limitations on the scope of protection afforded to Charter Arts, its officers, officials, agents, and employees. Additional insured status for both ongoing and completed operations, in favor of Charter Arts, its officers, officials, agents and employees, will be carried by Subcontractor performing installation.

(4) There shall be no endorsement or modification of the CGL or Umbrella Liability limiting the scope of coverage for liability arising from explosion, collapse, underground property damage, or damage to the named insured's work, when those exposures exist.

(5) The CONTRACTOR'S Commercial General Liability insurance shall be primary as respects Charter Arts, its officers, officials, agents, and employees. Any other insurance or self-insurance maintained by Charter Arts, its officers, officials, and employees shall be excess of and not contribute with the CONTRACTOR'S insurance.

(6) The insurer shall agree to waive all rights of subrogation against Charter Arts, its officers, officials, agents and employees for losses arising from work performed by the CONTRACTOR for the Charter Arts.

#### **(b) WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY**

(1) CONTRACTOR shall maintain Workers' Compensation as required by the general statutes of the State of Pennsylvania and Employer's Liability Insurance.

(2) The Employer's Liability, and if necessary, Commercial Umbrella Liability insurance shall not be less than \$500,000 each accident for bodily injury by accident, \$500,000 each employee for bodily injury by disease, and \$500,000 policy limit.

(3) The insurer shall agree to waive all rights of subrogation against Charter Arts, its officers, officials, and employees for losses arising from work performed by the CONTRACTOR for the Charter Arts.

#### **(c) BUSINESS AUTO LIABILITY**

(1) CONTRACTOR shall maintain Business Auto Liability and, if necessary, Commercial Umbrella Liability insurance with a limit of not less than \$1,000,000 each accident.

(2) Such insurance shall cover liability arising out of any auto, including owned, hired, and non-owned autos.

(3) Business Auto coverage shall be written on ISO form CA 00 01, or a substitute form providing equivalent liability coverage. If necessary, the policy shall be endorsed to provide contractual liability coverage equivalent to that provided in ISO form CA 00 01.

(4) Pollution liability coverage equivalent to that provided under the ISO pollution liability-broadened coverage for covered autos endorsement (CA 99 48) shall be provided, and the Motor Carrier Act endorsement (MCS 90) shall be attached when those exposures exist.

(5) CONTRACTOR waives all rights against Charter Arts its officers, officials, agents and employees for recovery of damages to the extent these damage are covered by the business auto liability or commercial umbrella liability insurance obtained by CONTRACTOR pursuant to Section 11.C.1 of this agreement.

(6) The CONTRACTOR'S Business Auto Liability insurance shall be primary as respects to Charter Arts, its officers, officials, agents, and employees. Any other insurance or self-insurance maintained by Charter Arts, its officers, officials, and employees shall be excess of and not contribute with the CONTRACTOR'S insurance.

#### **(d) DEDUCTIBLES AND SELF-INSURED RETENTIONS**

The contractor shall be solely responsible for the payment of all deductibles to which such policies are subject, whether or not The Charter Arts is insured under the policy.

#### **(e) MISCELLANEOUS INSURANCE PROVISIONS**

The policies are to contain, or be endorsed to contain, the following provisions:

(1) Each insurance policy required by this contract shall be endorsed to state that coverage shall not be canceled by either party except after 30 days prior written notice has been given to Charter Arts, 321 East 3rd Street Bethlehem, Pa. 18015.

2) If CONTRACTOR'S liability policies do not contain the standard ISO separation of insureds provision, or a substantially similar clause, they shall be endorsed to provide cross-liability coverage.

#### **(f) ACCEPTABILITY OF INSURERS**

Insurance is to be placed with insurers licensed to do business in the State of Pennsylvania with an A.M. Best's rating of no less than A VII unless specific approval has been granted by Charter Arts.

#### **(g) EVIDENCE OF INSURANCE**

(1) The CONTRACTOR shall furnish Charter Arts with a certificate(s) of insurance, executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements prior to commencing the work, and thereafter upon renewal or replacement of each certified coverage until all operations under this contract are deemed complete.

(2) Evidence of additional insured status shall be noted on the certificate of insurance.

(3) With respect to insurance maintained after final payment in compliance with requirements, an additional certificate(s) evidencing such coverage shall be provided to Charter Arts with final application for payment and thereafter upon renewal or replacement of such insurance until the expiration of the period for which such insurance must be maintained.

#### **(h) SUBCONTRACTORS**

CONTRACTOR shall include all subcontractors as insureds under its policies or shall furnish separate certificates for each subcontractor. All coverage for subcontractors shall be subject to all of the requirements stated herein. Commercial General Liability coverage shall include independent CONTRACTORS' coverage, and the CONTRACTOR shall be responsible for assuring that all subcontractors are properly insured. Additional insured status for both ongoing and completed operations, in favor of Charter Arts, its officers, officials, agents and employees, will be carried by Subcontractor performing installation.

#### **(i) CONDITIONS**

- (1) The insurance required for this contract must be on forms acceptable to Charter Arts.
- (2) The CONTRACTOR shall provide that the insurance contributing to satisfaction of insurance requirements shall not be canceled, terminated or modified by the CONTRACTOR without prior written approval of Charter Arts.
- (3) The CONTRACTOR shall promptly notify the Director of Facilities at (610) 868-2971 of any accidents arising in the course of operations under the contract causing bodily injury or property damage.
- (4) Failure of Charter Arts to demand a certificate of insurance or other evidence of full compliance with these insurance requirements or failure of Charter Arts to identify a deficiency from evidence that is provided shall not be construed as a waiver of CONTRACTOR'S obligation to maintain such insurance.
- (5) By requiring insurance herein, Charter Arts does not represent that coverage and limits will necessarily be adequate to protect the CONTRACTOR and such coverage and limits shall not be deemed as a limitation of CONTRACTOR'S liability under the indemnities granted to Charter Arts in this contract.
- (6) Charter Arts shall have the right, but not the obligation of prohibiting CONTRACTOR or any subcontractor from entering the project site or withholding payment until such certificates or other evidence that insurance has been placed in complete compliance with these requirements is received and approved by Charter Arts.

#### **SCOPE OF WORK- STANDARDS AND SPECIFICATIONS**

The Contractor shall retain professional personnel who have successfully and competently provided commercial facility HVAC maintenance and repair services on projects of similar scope and complexity. For the purpose of this contract, routine preventative HVAC maintenance shall be defined as scheduled routine inspection and proactive servicing of HVAC systems so as to facilitate heating/cooling with minimal downtime ([see attachment B for specific tasks](#)). The routine

maintenance and all repairs shall be provided in accordance with the highest standards of the industry, skill, workmanship, applicable trade practices, meet warranties and in conformance to all applicable laws, codes and regulations. The successful Proposer's preventative maintenance and repairs shall, at a minimum, include but not limited to the specifications outlined herein.

### **SERVICES TO BE PROVIDED**

It is the Proposer's responsibility to provide an appropriate level of staffing, materials, tools, equipment and vehicles to address the scope of work necessary to support all building HVAC equipment during normal business hours 7:00 A.M.- 4:00 P.M. Monday through Friday. Proposer's services are to be compliant with all Federal, State, CARB, AQMD, OSHA and all other applicable regulatory requirements.

Provide labor and material to perform preventative maintenance and service of all HVAC equipment three times a year: August, November, and March.

### **ITEMS COVERED UNDER AGREEMENT**

Contractor shall repair or replace failed or worn moving parts (such as, but not limited to: bearings, motor rotors, motor starters, seals, gears, burners, actuators, controls and switches). Prior to beginning any repair or replacement, the Contractor will troubleshoot the system to diagnose the system's problems. Contractor shall itemize the equipment list covered as repairable or replaceable. If HVAC Equipment is not repairable, the contractor will contact the Director of Facilities with an estimate to replace with an equivalent type.

<input type="checkbox"/> Replace filters MERV 11 <input type="checkbox"/> Replace belts yearly <input type="checkbox"/> Grease and lubricate bearings <input type="checkbox"/> Electrical checkout <input type="checkbox"/> Clean evaporator coil <input type="checkbox"/> Clean condensate drain <input type="checkbox"/> Clean condenser coil <input type="checkbox"/> Clean heat exchanger <input type="checkbox"/> Drain and refill cooling towers in Spring and Fall. Switch to fan operation only in Winter. <input type="checkbox"/> Clean and service cooling towers	<input type="checkbox"/> Check operating pressures <input type="checkbox"/> Check safety controls <input type="checkbox"/> Check blower section <input type="checkbox"/> Check cooling operations <input type="checkbox"/> Check proper temperatures <input type="checkbox"/> Check motor voltage/amps <input type="checkbox"/> Check burner operations <input type="checkbox"/> Check, clean and perform on tune up boilers one time per year. <input type="checkbox"/> Remove obstructions/flue <input type="checkbox"/> Replace bag filter in cooling loop filter (filter bags to be provided by Charter Arts)
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### **HVAC MAINTENANCE STAFFING LEVELS**

The Contractor shall:

- Provide a staffing level that will provide the desired level of customer service, program support, HVAC maintenance and repair for Charter Arts.
- Show evidence of presently serving at least three local commercial businesses that

received a similar scope of services.

- Use technicians sufficiently trained and under the direction of a licensed HVAC mechanic.
- Supply their staff with their agency uniform and photo identification tags that will be worn at all times. Uniforms shall display the Contractor logo.
- Provide the ability to respond immediately (within two hours) to situations involving the health and safety of employees and/or the public; comfort and operational capability of any public meeting space. Routine repairs, service requests or other non-urgent tasks shall be completed by journey level staff within one (1) working day from the date of the request or assignment from a Charter Arts Representative.

## **REPORTING & ACCOUNTING**

The contractor will provide a standard proof of work documentation following completion of work. The document must include sufficient information to identify facility where the work was performed, equipment and/or components on which work was performed, purpose of the work, date and time of the work, parts used, types of refrigerants, and the name /cert # technician executing the work. This should be submitted within 48 hours of the work being performed.

All work beyond and in addition to the scope of the contract shall be considered billable hours and will require a proposal with pricing to be submitted and approved by the Director of Facilities.

On each anniversary date, Charter Arts may consider Contractor requested price increases.

Charter Arts may cancel the contract if a requested price increase is not acceptable. Any Request must be submitted to the Director of Facilities by January 15th to be included in the budget process. The contractor is responsible to submit invoices at the completion of the preventative service and/or services performed at Charter Arts, and must contain the correct pricing. Charter Arts issues payment to the Contractor approximately 30 days after receipt of the invoice for the services performed.

## **SECURITY BACKGROUND CHECK OF PERSONNEL**

Contractor is required to provide security checks for all personnel assigned to work under this contract and will run security checks of all personnel assigned to work under this contract. Charter Arts reserves the right to approve/refuse any prospective employees of the contractor as a result of the background check.

### **Background Checks Required**

- PA Child Abuse History Clearance
- PA State Police Request for Criminal Check
- Federal Criminal History Record Information (FBI Fingerprint)

## **EMERGENCY CALL OUT SERVICE**

When necessary, the Contractor shall provide 24-hour emergency service as needed in all aspects of HVAC emergency repair for Charter Arts included in this specification. Emergency hours shall be Monday through Friday 4:00 p.m. to 7:00 a.m. and 24 hours each day on weekends and

holidays. Contractor shall provide emergency response on-site within two (2) hours of notification but must also provide a call-back to the Director of Facilities within 30-minutes to discuss the issue and response plan.

## **HEATING-VENTILATION-AIR CONDITIONING**

### **(HVAC MAINTENANCE SPECIFIC SERVICES)**

Contractor shall provide expeditious services to Charter Arts covered under this agreement.

- Contractor shall respond to indoor temperature complaints and provide expeditious correction and record complaints and corrections at Charter Arts building.
- Contractor shall inspect all HVAC systems at least twice each year, with seasonal start up and run inspections performed and documented.
- Contractor shall review and, through monitoring and inspections, verify that the services described in Attachment B (Periodic Maintenance Service Schedule) are performed three (3) times a year
- Contractor will perform scheduled annual inspection and quarterly preventive maintenance in accordance with services described in Attachment B (Periodic Maintenance Service Schedule) as well as a program of standard routines as determined by your experience, equipment application, and equipment operating hours that are recommended by each equipment manufacturer and location. The equipment included under these services is itemized in the Building and Equipment List (Attachment A)
- HVAC Air Filter Changing Service
  - Three (3) times a year -This service will maintain indoor air quality by providing and changing filters and minimizing dust and particles from collecting on ductwork. This service will ensure proper flow through cooling and heating coils, thus preventing restrictions in airflow, leading to higher system and energy efficiency. All filters are to be pleated high efficiency type – MERV 11 filters are required. All filters should be marked with the date when they are replaced.
- Air Cooled Condenser Coil Cleaning – Annual Service
  - This service will improve airflow across condenser coils, improve heat transfer and extend the life of the compressors. Coil cleaning consists of cleaning the outside surface of the condensing unit coils to remove any airborne particles, dirt build-up by using a brush, high pressure air, chemical with low pressure wash or chemical with high pressure wash based on the condition of outside environment and coil accessibility.
- Evaporator Coil and Cleaning – Annual Service
  - Contractor will clean air handling unit evaporator coils that will help improve air circulation in the air distribution system, and reduce dust and dirt that is in the system. Coils will be cleaned at a time that is mutually agreeable between the proposer and the Director of Facilities. Coil cleaning consists of cleaning the surface of the evaporator coil to remove dust and dirt particles that have collected on the evaporator coil. Coils will be cleaned using a vacuum cleaner and or other devices that allow the proper cleaning of the coil.

## **RFP RESPONSE TIME**

The RFP process shall adhere to the following schedule.

<b>RFP Process</b>	<b>Date</b>	<b>Time</b>
Advertise RFP	10/25/23	9:00 A.M.
Pre-submittal Meeting – Mandatory	11/1/23	9:00 A.M.
RFP Due Date	11/15/2023	3:00 PM
RFP Analysis / Evaluation	11/15-11/17/2023	12:00 Noon

Note: All times shown as Eastern Standard Time (EST).

**PRE-PROPOSAL QUESTIONS:** Questions concerning the specifications in this Request for Proposals should be directed to the Director of Facilities. Questions will be received until November 14, 2023, at 3:00 pm. An addendum summarizing all questions and answers will be posted to the Charter Arts website.

Brian Filchner

Director of Facilities

Lehigh Valley Charter High School for the Arts

Email: [bfilchner@charterarts.org](mailto:bfilchner@charterarts.org)

Phone: 610 868-2971 ext.3134

## **PROPOSAL SUBMITTAL REQUIREMENTS**

The following items are required to be present in your proposal:

1. Company profile (include all requirements of section PROPOSAL FORMAT)
2. Technical expertise including three (3) business references
3. Staffing summary for our location - include qualifications of assigned technicians
4. Completed Pricing Summary
5. Completed Proposer's Certification
6. Completed Non-Collusion Affidavit
7. Completed new vendor paperwork should be requested via email to [bfilchner@charterarts.org](mailto:bfilchner@charterarts.org)

Charter Arts evaluation process will primarily focus on responses as presented in these sections.

Proposers must submit one (1) signed original and five (5) copies of the "RFP – Preventive Maintenance and Repair Services -Citywide" proposal.

Proposals must be enclosed in a sealed envelope or package and clearly marked: "RFP NO. HVAC Preventative and Repair Services - Citywide."

Hardcopy versions must be received by Charter Arts on or before November 15, 2023 at 3:00 p.m.

Deliver Proposals to the Director of Facilities at the following mailing / physical address:

**Lehigh Valley Charter High School for the Arts**

**Attention: Brian Filchner**

**321 East 3rd Street**

**Bethlehem, Pa. 18015**

Proposals received after the "RFP Due" deadline above will not be considered and will be returned unopened to the return address on the submission envelope. The outside of the submittal package must be clearly marked. Charter Arts reserves the right to reject any or all proposals for any reason and to waive any informality it deems in its best interest.

Any requirements in the RFP that cannot be met must be indicated in the statement of qualification. Proposers must respond to the entire Request for Proposal. Any proposals received by Charter Arts that are incomplete in their responses will be immediately disqualified. Please submit a complete proposal responding to all the required information requested. Incomplete proposals will be considered non responsive and subject to rejection.

## **RIGHTS TO SUBMITTAL MATERIAL**

All statements, responses, inquiries, or correspondence relating to or in reference to this RFP, and all reports, charts, and other documentation submitted by Proposers shall become the property of Charter Arts when received and the entire statement of qualification shall be subject to the public records laws of the State of Pennsylvania except where a proper trade secrets exception has been

made by the Proposer in accordance with the procedures allowed by Pennsylvania Law and marked in bold "Confidential."

Charter Arts reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the Proposer of the conditions contained in this Request for Proposal.

## PROPOSAL FORMAT

Proposals should be limited to 25 pages or less, inclusive of cover page. Please use 8 ½" x 11" sheets, single spaced, one sided with no less than 12 point font. The Proposer's Certification, Non-Collusion Affidavit, and any section dividers and/or back cover do not count towards the 25 page limit.

### A. Cover Letter/Letter of Intent

The cover letter shall be addressed to Mr. Brian Filchner, Director of Facilities. It may be up to two pages (which do not count toward the 25-page maximum) and, at a minimum, must contain the following:

- Identification of organization, including name, address and telephone number.
- Name, title, address, and telephone number of contact person during period of proposal evaluation.
- A statement to the effect that the proposal shall remain valid for a period of not less than 90 calendar days from the date of submission.
- Signature of a person authorized to bind the Firm to the terms of the proposal.

### B. Proposal Submittal

- Proposals should define the scope and scale of the project.

### C. Financial Capacity

Prospective proposers shall provide:

- Evidence of sufficient financial strength to successfully provide services and required materials for this project
- Any information that a proposer deems to be confidential and not a public record within NCGS § 132 et al must be clearly identified and marked as "CONFIDENTIAL."

### D. Pre-Proposal Meeting

Charter Arts invites all interested parties planning to submit a proposal to the pre-proposal meeting. This meeting is mandatory for vendors who wish to submit a proposal and will be held at Lehigh Valley Charter High School for the Arts Wednesday, November 1, 2023, 9:00 A.M.

## EVALUATION CRITERIA

This is not a bid. There will not be a public bid opening. Charter Arts will consider the following factors in selecting a maintenance and service provider for this proposal:

CRITERIA	WEIGHTS
Completeness and clarity of the proposal.	15%
Your firm's overall experience in the field of heating, ventilation, and air conditioning units and refrigeration equipment	40%
Responses from references	15%
Price of proposed services	30%
Criteria Total	100%

The evaluation process will be directed primarily at those capabilities clearly shown in the written proposal submitted. However, Charter Arts may request any or all firms submitting proposals to make oral presentations to provide additional information. Charter Arts shall be the sole judge of all proposals, particularly, which one best qualifies for acceptance. Charter Arts reserves the right to accept other than the lowest-priced proposal and to negotiate with Proposers if it appears to be in the best interest of the Charter Arts to do so. Charter Arts reserves the right to reject any and all proposals. The rejection of any or all proposals shall not render the Charter Arts liable for costs or damages. The proposal must be signed by an officer or agent who has the authority to legally bind the Contractor.

## FINAL SELECTION

A team, composed of Charter Arts Staff, will be responsible for the proposal evaluations. This team, in accordance with the criteria listed above, will evaluate all proposals received as specified. The Charter Arts team members, in applying the major criteria to the proposals, may consider additional sub-criteria beyond those listed, as may come to light through the review of the various proposals. During the evaluation period, Charter Arts reserves the right to interview the top selected firms or all the responding firms. Charter Arts final selection will be the firm which, in Charter Art's opinion, provides the best overall proposal in the Charter Arts best interest for the property. Charter Arts maintains the sole and exclusive right to evaluate the merits of the proposals received.

Firms will be objectively evaluated based on their responses to the scope outlined in the RFP. The written proposal should clearly demonstrate how the firm could best satisfy the requirements of Charter Arts.

Charter Arts reserves the right to make an award without further discussion of the proposal submitted. Charter Arts shall not be bound or in any way obligated until both parties have executed a contract. Charter Arts also reserves the right to delay the award of a contract or to not award a contract. The RFP may be awarded by individual task or total proposal, whichever is most advantageous to Charter Arts.

## ATTACHMENT A

### EQUIPMENT LIST

- Eighty one (81) water source heat pumps
- Four (4) boilers
- Two (2) circulating pumps
- Five (5) ductless split units
- Four (4) energy recovery units
- Two (2) condensers
- Four (4) indoor coils
- Two (2) rooftop units
- Four (4) exhaust fans
- Two (2) cooling towers
- One (1) cooling loop bag filter

## **ATTACHMENT B**

### **PERIODIC MAINTENANCE SERVICE SCHEDULE**

The following tasks listed herein for each equipment type will be performed at the intervals planned. These tasks are designed to place the equipment into prime operating condition so that the equipment will operate effectively, reliably, and efficiently. Frequency shall be three (3) times a year unless noted otherwise:

#### **Rooftop Packaged Units**

1. Preventative maintenance inspection and filters changed
2. Check all electrical wiring, connections, tighten as required
3. Check all motor starter contactor surfaces for wear
4. Clean electrical control enclosures
5. Lubricate air handling unit motor bearings and fan bearings, if applicable
6. Check air handling unit belts for wear and change as required
7. Check belt tension and sheave alignment
8. Check the condition of evaporator coils, chemically clean as required
9. Check and clean condensate drains, drain lines and pan
10. Lubricate condenser motors annually
11. Clean condenser coil and fan blades annually
12. Calibrate controls annually

#### **Compressors**

1. Preventive maintenance
2. Check all electrical wiring and connections, tighten as needed
3. Check starter contactor surfaces for wear
4. Visually leak check compressor and associated refrigerant piping
5. Clean exterior of compressor
6. Check operation of crankcase heater
7. Meg-ohm motor from starter and record
8. Check and calibrate all safety and cut-out devices
9. Check and adjust compressor capacity control
10. Check, calibrate and adjust all operational controls
11. Check head and suction line pressure

### Exhaust Fans – Semi-Annually

1. Preventative Maintenance
2. Check all electrical wiring and connections and tighten
3. Check all motor starter contactor surfaces for wear
4. Clean starter and electrical control enclosures
5. Lubricate motor bearings and fan bearings
6. Check exhaust fan belts for wear, replace once a year
7. Check belt tension and sheave alignment, adjust as required
8. Check all mounting hardware, tighten as required

### Package, Gas Heat Electric Cool

1. Preventative maintenance inspection and filters changed
2. Check unit voltage and record
3. Lubricate motors as required
4. Check and adjust burners for proper flames
5. Check for proper combustion and flue gas relief
6. Record discharge temperature, heating and cooling modes
7. Record return air temperature
8. Check and adjust operating and safety controls
9. Check and clean condensate drains, drain line and pan

### Air Handler

1. Preventive maintenance inspection and filters changed
2. Check starter contacts for excessive wear
3. Tighten all starter wire connections
4. Check belts, adjust or replace as needed
5. Check belt tension and sheave alignment, adjust as required
6. Meg-Ohm motor and record
7. Check fan motors amps
8. Clean and lubricate unit motor bearings and fan bearing
9. Check operation of economy dampers
10. Lubricate and tighten all dampers and linkages as necessary
11. Check operation of static vane (if applicable)

12. Visually check all coils for leaks
13. Check and record all coil delta T
14. Inspect all mounting hardware, tighten as needed
15. Clean outside air screens. (3x/yr)
16. Inspect condition of vibration isolators
17. Check and clean condensate drains, drain line and pan

#### Multi-zone Air Handler

1. Perform maintenance
2. Lockout tag out equipment
3. Check fan motor amps
4. Clean and lubricate components
5. Check operation of economy dampers
6. Check operation of static vane or dampers
7. Check operation of zone dampers
8. Check and adjust operating and safety controls
9. Inspect starter contacts
10. Inspect condition of vibration isolators
11. Check and clean condensate drains, drain line and pan

#### Variable Frequency Drive

1. Check unit operation
2. Check fault history report
3. Check operation of manual bypass
4. Verify drive signal increase and decrease
5. Check and tighten all electrical connections
6. Check starter contacts for wear

#### Boiler

1. Check boilers for proper operation
2. Check and use boiler viewport to check main burner flame
3. Turn off and secure boiler
4. Check boilers for any unusual noise or vibration

5. Inspect gaskets for any signs of leaks
6. Examine the venting system
7. Check flame safeguard control for pilot and main flame ignition
8. Check operation of blower motor and circuitry
9. Check boiler circulating pumps for proper operation and lubricate
10. Check operation of gas valves and vents
11. Inspect and tighten all electrical connections
12. Check and adjust burner, pilot and main flame ignition
13. Flush pressure relief valve, refer to the equipment O&M manual for any maintenance clarifications.

#### Evaporator and Condenser Coils

1. Chemically clean air-cooled condenser
2. Clean condensate pan and chemically treat related drain
3. Inspect and chemically clean evaporator

#### Circulation Pumps – Annually

1. Flush and lubricate pump and motor bearings
2. Check coupling alignment and security to shaft
3. Tighten base mountings bolts

#### Cooling Towers

1. Drain and refill cooling towers in Spring and Fall
2. Clean cooling towers (annually)

#### Cooling Loop Filter - as needed

1. Change bag filter
2. Pull strainers and back flush water coils in two (2) energy recovery units in the lower level

## PRICING SUMMARY

**TYPE OF BILLING:** Three (3) times a year: August, November, March

Billing each time = \$ \_\_\_\_\_

Contract Total = \$ \_\_\_\_\_

Service Rate = \$ \_\_\_\_\_

Planned service agreement customers rate applies for all service calls and repairs found in the inspection, during normal business hours.

Overtime Rate = \$ \_\_\_\_\_

Overtime rate applies for service calls and repairs after normal business hours.

Vehicle/travel charge = \$ \_\_\_\_\_

**EXCEPTIONS TO SERVICES:** Mark any items your company is not qualified to work with.

- ☐ Condensing Units
- ☐ Air Handlers
- ☐ Pump and Motors
- ☐ New & Replacement Wiring
- ☐ Zone Boards & Thermostats
- ☐ BAS Control Systems
- ☐ Chillers / Cooling Towers
- ☐ Boilers
- ☐ Gas Heaters
- ☐ Exhaust Fans
- ☐ Wall & Ceiling Heaters
- ☐ Mini-Split Units
- ☐ VRF Units
- ☐ VAV Boxes

Please indicate any other exclusions from the scope of work provided:

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Please indicate any additions to the scope of work provided:

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RFP NO. \_\_\_\_\_

HVAC PREVENTATIVE MAINTENANCE AND REPAIR SERVICES

**PROPOSER'S CERTIFICATION**

Proposer's Signature: \_\_\_\_\_

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

By signing above, I certify that I have carefully read and fully understand the information contained in this RFP, that I have the capability to successfully undertake and complete the responsibilities and obligations of the Request for Proposal being submitted, and that I have the authority to submit this RFP on behalf of my organization. It is the proposer's responsibility to assure that all addenda have been reviewed prior to proposal submission.

BY (Printed): \_\_\_\_\_

NAME AND TITLE: \_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

The proposer supplies the information recorded below for use in the preparation of the contract documents, in event of contract award:

1. Please indicate type of business organization:

- (a) Proprietorship \_\_\_\_\_
- (b) Partnership \_\_\_\_\_
- (c) Corporation \_\_\_\_\_
- (d) Limited Liability Co. \_\_\_\_\_

2. If business is a Corporation, please answer the following questions:

Name and title of officers, authorized by Corporate Resolution, who will execute the contract on behalf of the corporation (generally President and Secretary).

Firm is incorporated in what state?

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3. If business is a Partnership, please answer the following:

Name in full or all general partners and addresses:

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Is this a limited or general partnership? \_\_\_\_\_

If a limited partnership, what is the state of registration?

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4. If business is a Proprietorship, please answer the following:

Name of owner:

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5. If business is a limited liability company, please answer the following:

List the names and titles of managers or member-managers who will execute the contract on behalf of the company?

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What is state of organization?

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