



**Request for Proposals
19RFP079 Air Conditioning and Heating (HVAC) Maintenance
and Repair Services**

Date	Event
January 8, 2019	Advertise/Issue Date
January 16, 2019	Due Date for Questions by 2:00 pm
January 18, 2019	Questions and Answers posted on our website
January 29, 2019	RFP opening / due date at 2:00 pm CST
March 25, 2019	AISD Board Meeting for review/approval

<p>Deliver Sealed Proposals to: Austin ISD Contract & Procurement Services 1111 West 6th Street Building A, Suite 330 Austin, TX 78703</p>	<p>Contact: Name: Julie Bynum Title: Procurement Specialists Phone: 512-414-2114 julie.bynum@austinisd.org</p>
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- Questions must be submitted via e-mail to the contact person listed above. **In the e-mail subject line, type: Questions 19RFP079 HVAC Services**
- Q & A and Addenda will be posted on our website: www.austinisd.org/cp/bids
- Proposals are due no later than 2:00 pm on the date indicated. Your proposals must be delivered by mail or hand delivery in a sealed envelope or carton. Proposals received after the specified time shall not be considered.
- **Please submit the following:**
 - Required**
 - One (1) hard copy marked “original” – include signed “required” forms
 - Requested**
 - One (1) digital copy on a flash drive – include signed “required” forms
 - Four (4) hard copies marked “copy”
- FAX, e-mail or other electronic proposals **will not be accepted.**
- Proposals must be plainly marked with:
 - **Name and address of the Respondent**
 - **RFP number and Title above**

Checklist and Submission Guidelines

This checklist is provided to help you conform to all form/document requirements stipulated in this solicitation and attached herein.
(It is not necessary to return this checklist with your proposal.)

Understanding the Proposal

Completed

- Read entire RFP document, appendices and attachments
- Review AISD Policy and Instructions on our website: [Policy and Instructions](#)
- Attend Pre-Proposal Conference
- Submit questions properly before deadline
- Review addenda, Q&A and other additional attachments

Forms

Completed | Required

- | Bid Certification
- | Notification of Criminal History of Contractor
- | Debarment, Suspension and Ineligibility Certification
- | Conflict of Interest Questionnaire (CIQ) - electronic
- | HUB Utilization Report (HUR) – HUBATT 1
- | HUB Compliance Checklist – HUBATT 1A
- | Strategic Partner Profile
- | EDGAR Vendor Certification
- | Software Vendor Certification Form

Submitting the Proposal

Completed

- Review Proposal Format section of RFP (Section VI)
- Submit required hard copy marked “original”
- Submit requested quantity of digital copy on flash drive
- Submit requested quantity of hard copies marked “copy”
- Package proposal in sealed envelope or carton properly labelled
- Deliver proposal to delivery address by RFP opening / due date and time

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I. INTRODUCTION

The Austin Independent School District (herein after referred to as “AISD” or the “District”) is seeking proposals from firms qualified and experienced in providing air conditioning and mechanical support services for various types of HVAC equipment. The District is comprised of 130 sites with 13,000+ various types of HVAC equipment. Services requested are to include but not limited to equipment repairs as well as planned preventative maintenance procedures. Being a legal method of procurement for school districts in Texas, AISD would like to utilize current platforms to engage suppliers.

As this RFP has multiple scopes, AISD may award one or multiple contracts depending on responses received, capabilities of the proposer and service level required by the District. Services to be provided at various locations throughout the District on an as needed basis.

II. HISTORICALLY UNDERUTILIZED BUSINESS (HUB) PROGRAM REQUIREMENTS

The Austin ISD HUB Program promotes and strongly encourages the involvement and participation of Historically Underutilized Businesses (HUB) in District-wide procurement. When AISD considers entering into a contract estimated at \$50,000 or more, the HUB Program will determine whether subcontracting opportunities are applicable before publishing the solicitation.

All proposers are required to follow the HUB Compliance Guidelines included in this solicitation and complete either the HUB Utilization Report – HUR (HUBATT 1) or HUB Compliance Plan - HCP (HUBATT 1C) for compliance review. All HUB inquiries should be directed to the HUB Program Department.

No Goals

No Goals are appropriate for this project. While no goals have been established for this project, the Bidder/Proposer is required to comply with AISD HUB Program Regulations if areas of subconsulting are identified. Please complete the HUB Utilization Report - HUR form (HUBATT 1). When the HUR Form and Good Faith Effort - GFE documentation, if required, are NOT submitted at time of deadline specified in the solicitation, it may not be accepted later for compliance review. (Reference HUB No Goal Compliance Information)

III. PROPOSAL FORMAT

A. Preface

The Proposer shall provide an Executive Summary of two (2) pages or less, which gives in brief, concise terms, a summation of the proposal.

B. Proposal

The vendor’s proposal itself shall be organized in the following format and informational sequence:

Section I – Summary of Experience

This section shall contain the full name and address of the Proposer submitting the proposal and a brief summary of the Proposer's corporate experience and individual experience for personnel who will provide this product or service.

Section II - Scope of Service

A description of services and capabilities as outlined in the Scope of Service and Performance Requirements sections of this RFP, in the order shown. Clearly state any exceptions taken to the specifications of this RFP, or any conditions of the proposal.

Section III - Financial Proposal

This section shall contain a straightforward, concise delineation of the Proposer's fees to satisfy the requirements of this RFP. It is the vendor's responsibility to specify all costs (i.e. administrative fees, processing fees, etc.) associated with providing the products or services required herein.

Section IV – References

References are to be from government agencies and/or firms, which are substantially serviced by the vendor (references most similar to Austin ISD should be provided). Each reference must contain the reference's name, address, telephone number, and point of contact (including email address). A list of at least three (3) references from current customers must be provided.

C. Required Forms

Forms are required with **Original response & flash drive only**; they can be excluded from additional requested copies.

Proposer shall execute the following required forms (located on our website: [Required Forms link](#)), and return the **signed original** with the proposal:

- Bid Certification
- Notification of Criminal History of Contractor
- Debarment, Suspension and Ineligibility Certification
- HUB Utilization Report (HUR) – HUBATT 1
- Conflict of Interest Questionnaire (CIQ). The CIQ is prepared by the Texas Ethics Commission, in compliance with House Bill 914, Chapter 176 of the Texas Local Government Code. The form should be submitted on-line at [Conflict of Interest Questionnaire - CIQ](#).

IV. INITIAL REVIEW OF PROPOSALS

Any proposer determined non-responsible or any proposal determined non-responsive will not be evaluated further. All proposals will be reviewed for responsiveness. The proposer will be notified of a non-responsible or non-responsive determination.

Responsive

In order for a proposal to be responsive:

- ALL required forms listed above shall be included with proposal;
- Proposal shall be received prior to the RFP Opening Date at the address listed on the cover page;
- Proposal shall respond to the entire scope of service and performance requirements as requested.

Responsible

In order for a proposal to be responsible, the proposer shall be in good financial standing with the Texas Comptroller of Public Accounts.

V. COMPETITIVE SELECTION / EVALUATION

- A. This is a NEGOTIATED procurement and as such, award will not necessarily be made to the offeror submitting the lowest priced proposal. Award will be made to the firm submitting the best responsive proposal satisfying AISD’s requirements, price and other factors considered.
- B. The District anticipates that the evaluation process may include multiple levels of evaluation, as for example, but not limited to:
Phase 1: Initial review of the proposal by the District’s Evaluation Team
Phase 2: Interviews and/or presentations of top proposals from Phase 1, followed by administrative review of finalist(s) and award recommendation.

PHASE 1

Points	Item	Detailed Description
20 Points	Proposed Plan	<ul style="list-style-type: none"> • The extent to which the goods or services meet the district’s needs. • Any other relevant factor specifically listed in the request for bids or proposals.
40 Points	Contractor's Capabilities	<ul style="list-style-type: none"> • The reputation of the vendor and of the vendor’s goods or services. • The quality of the vendor’s goods or services. • The vendor’s past relationship with the district.
40 Points	Financial Proposal	<ul style="list-style-type: none"> • Purchase price. • The total long-term cost to the district to acquire the goods or services.

PHASE 2 (optional)

Points	Item	Detailed Description
35 Points	Interview / Presentation	<ul style="list-style-type: none"> • The extent to which the goods or services meet the district’s needs. • Any other relevant factor specifically listed in the request for bids or proposals.
35 Points	Contractor's Capabilities	<ul style="list-style-type: none"> • The reputation of the vendor and of the vendor’s goods or services. • The quality of the vendor’s goods or services. • The vendor’s past relationship with the district.
30 Points	Financial Proposal	<ul style="list-style-type: none"> • Purchase price. • The total long-term cost to the district to acquire the goods or services.

- C. The committee evaluating the proposals submitted in response to this RFP may require any or all contractors to give an oral presentation in order to clarify or elaborate on their proposal as well as to provide a demonstration. Upon completion of oral presentations or discussions, Contractors may be requested to revise any or all portions of their proposals and submit a best and final offer (BAFO) for consideration.
- D. If the District determines that additional evaluation steps are required to determine the best value between Proposers, the District reserves the right to consider any or all of the following additional criteria; the proposed price, Proposer's experience, references and record for responsibility, or any other relevant factor that the District deems necessary to determine best value.

VI. SCOPE OF SERVICE AND PERFORMANCE REQUIREMENTS

Multiple Scopes

Proposers may respond to one or multiple scopes listed below. Please respond to only the scope(s) in which you are capable of performing. In your proposal please indicate distinctly which scope(s) you are responding to by the associated number and title.

Term

The agreement(s) resulting from this solicitation will be in effect for an initial term of two (2) years from the date of award by the Board of Trustees, or such date established by the agreement. The parties by mutual consent may renew the agreement for up to three (3) additional one (1) year periods. In addition, the District reserves the right to extend the contract for an additional ninety (90) days beyond the final expiration date if necessary, to ensure no lapse in service.

Parts Pricing

AISD reserves the right to provide parts for all repairs, however; most smaller repairs it is advantageous to use parts on hand provided by contractor.

1. General HVAC Repair

- a. Service Type: General HVAC repair services to include but not limited to compressors, valves, fan motors, hydronic pumps, etc.
- b. Unit type: Typical split system, Package system, Hydronic system and other commercial HVAC equipment. Please indicate all units and consequent experience level.
- c. Response Time: Normal response time required will be within three days of service request. Please indicate response time.
- d. Emergency Response Time: Emergency response time required will be at least same day service. Please indicate emergency response time.
- e. Financials:
Provide hourly labor rates for the following:
 1. Regular business hours
 2. Overtime hours
 3. Holiday hoursProvide discount off manufacturer list price for parts and complete assemblies.
- f. Special Requirements:
 1. Responding companies must provide references to verify light and heavy commercial equipment experience.

2. Responding Companies must be licensed by the Texas Department of Licensing and Regulations for Air Conditioning and Refrigeration.
3. All work will be accompanied by a minimum of ninety-day parts and labor warranty.
4. Provide current staffing level and indicate number of licensed technicians.

2. MDF Room HVAC Repair

- a. Service Type: Repair services to HVAC systems servicing rooms housing heat sensitive networking equipment.
- b. Unit type: Typical split system, mini split/ ductless systems, Hydronic system, other commercial HVAC equipment. Please indicate all units and consequent experience level.
- c. Response Time: Normal response time required will be same day service. Please indicate response time.
- d. Emergency Response Time: Emergency response time required within two hours. Please indicate emergency response time.
- e. Financials:
Provide hourly labor rates for the following:
 1. Regular business hours
 2. Overtime hours
 3. Holiday hoursProvide discount off manufacturer list price for parts and complete assemblies.
- f. Special Requirements:
 1. Responding companies must provide references to verify light and heavy commercial equipment experience.
 2. Due to the importance of stable temperatures to maintain the equipment in these rooms the company awarded must maintain available staff to respond to calls twenty -four hours a day seven days a week.
 3. Responding Companies must be licensed by the Texas Department of Licensing and Regulations for Air Conditioning and Refrigeration.
 4. All work will be accompanied by a ninety-day parts and labor warranty.

3. Geothermal HVAC Repair

- a. Service Type: Repair services to ground source HVAC and the related ground well systems associated with them including but not limited to pumps, piping, heat exchangers, etc.
- b. Units type: Console units and suspended air handlers. Please indicate all units and consequent experience level.
- c. Response Time: Normal response time required will be within three days of service request. Please indicate response time.
- d. Emergency Response Time: Emergency response time required will be same day service. Please indicate emergency response time.
- e. Financials:
Provide hourly labor rates for the following:
 1. Regular business hours
 2. Overtime hours
 3. Holiday hoursProvide discount off manufacturer list price for parts and complete assemblies.
- f. Special Requirements:
 1. Responding companies must provide references to verify light and heavy commercial equipment experience including the specific knowledge, equipment and tools to diagnose and repair geothermal equipment and wells.
 2. Responding Companies must be licensed by the Texas Department of Licensing and Regulations for Air Conditioning and Refrigeration.
 3. All work will be accompanied by a ninety-day parts and labor warranty.

4. HVAC Controls Repair

- a. Service Type: Repair services to HVAC control systems and devices including but not limited to programming, controllers, communication lines, actuators, routers, sensors, jaces, etc.
- b. Unit type: Lon and Bacnet Controllers along with related devices. Inet, Vista and Tridium programs. Please indicate all units and consequent experience level.
- c. Response Time: Normal response time required will be within three days of service request. Please indicate response time.
- d. Emergency Response Time: Emergency response time required will be same day service. Please indicate emergency response time.

e. Financials:

Provide hourly labor rates for the following:

1. Regular business hours
2. Overtime hours
3. Holiday hours

Provide discount off manufacturer list price for parts and complete assemblies.

f. Special Requirements:

1. Responding companies must provide references to verify light and heavy commercial control equipment experience in diagnosing and repairing both Lon and Bacnet control systems.
2. Responding Companies have certifications for installing and maintaining of Lon and Bacnet control systems. Please provide certifications.
3. All work will be accompanied by a ninety-day parts and labor warranty.

5. Refrigeration Repair

a. Service Type: Refrigeration diagnosis and repair in both commercial refrigerators and freezers. Including but not limited to compressors, valves, fan motors, defrost controls, etc.

b. Unit type: Walk-in coolers and freezers, reach-ins, ice machines. Please indicate all units and consequent experience level.

c. Response Time: Normal response time required will be same day service. Please indicate response time.

d. Emergency Response Time: Emergency response time required will be within two hours. Please indicate emergency response time.

e. Financials:

Provide hourly labor rates for the following:

1. Regular business hours
2. Overtime hours
3. Holiday hours

Provide discount off manufacturer list price for parts and complete assemblies.

f. Special Requirements:

1. Responding companies must provide references to verify light and heavy commercial experience diagnosing and repairing commercial refrigeration equipment.
2. Due to the importance of stable temperatures to maintain perishable items in these spaces the company awarded must maintain available staff to respond to calls twenty -four hours a day seven days a week.

3. Responding Companies must be licensed by the Texas Department of Licensing and Regulations for Air Conditioning and Refrigeration.
4. All work will be accompanied by a ninety-day parts and labor warranty.

6. Boiler Repair

- a. Service Type: Repair services to both hydronic and domestic boilers including but not limited to control boards, gas valves, sensors, preventative maintenance procedures, etc.
- b. Units type: Condensing and non-condensing boilers. Please indicate all units and consequent experience level.
- c. Response Time: Normal response time required will be within three days of service request. Please indicate response time.
- d. Emergency Response Time: Emergency response time required will be same day service. Please indicate emergency response time.
- e. Financials:
Provide hourly labor rates for the following:
 1. Regular business hours
 2. Overtime hours
 3. Holiday hoursProvide discount off manufacturer list price for parts and complete assemblies.
- f. Special Requirements:
 1. Responding companies must provide references to verify light and heavy commercial equipment experience diagnosing and repairing commercial boilers.
 2. All work will be accompanied by a ninety-day parts and labor warranty.

VII. APPENDICES AND ATTACHMENTS

- Appendices (Documents included within this proposal):
 - Appendix 1 – Purchasing and Acquisition Vendor Relations – Policy CHE-LOCAL

- Attachments (Separate documents available to download):
 - HUB Utilization Report (HUR) – HUBATT 1
 - HUB NO GOALS Compliance Guidelines

**Contacting Board
Members**

Vendors shall not contact Board members individually for the purpose of soliciting a purchase or contract during the restricted contract period.

If a vendor violates this prohibition during this time frame, consideration of the vendor for award shall be invalidated. Board members shall be notified of possible violations and actions taken.

**Restricted Contact
Period**

The restricted contact period shall begin upon the date of issuance of a solicitation and shall end upon execution of the awarded contract by all parties.

In an effort to demonstrate its commitment to ethical procurement and contracting standards, and to improve accountability and public confidence, all District purchases of goods and services through competitive methods as provided in CH(LEGAL) and CV(LEGAL) shall be subject to a restricted contact period. Except as provided in this policy communication between a vendor and vendor's representative, and a Board member, the Superintendent, assistant superintendent, chief, officer, executive director, principal, department head, director, manager, project manager, or any other District representative who has influence on or is participating in the evaluation or selection process is prohibited.

*Prohibited
Communications*

A vendor and vendor's representative are prohibited from communications regarding the particular solicitation at issue that are intended or reasonably likely to:

1. Provide substantive information regarding the subject of the solicitation;
2. Advance the interests of the vendor;
3. Discredit the response of any other vendor;
4. Encourage the District to reject a response by a bidder;
5. Convey a complaint about the solicitation; or
6. Directly or indirectly ask, influence, or persuade a Board member, the Superintendent, assistant superintendent, chief, officer, executive director, principal, department head, director, manager, project manager, or any other District representative who has influence on or is participating in the evaluation or selection process, to take action or refrain from taking action on any vote, decision, or agenda item regarding the solicitation at issue.

*Permissible
Communications*

A vendor and vendor's representative are permitted to communicate with the District regarding the following:

PURCHASING AND ACQUISITION
VENDOR RELATIONS

CHE
(LOCAL)

1. Communication to the extent the communication relates solely to a nonsubstantive, procedural matter related to a response or solicitation;
2. Communication that relates solely to an existing contract between a respondent and the District, even when the scope, products, or services of the current contract are the same or similar to those contained in an active solicitation;
3. Communication with the District's Office of Contract and Procurement Services;
4. Communication with the District's Historically Underutilized Business (HUB) Program Department to the extent the communication relates to obtaining a listing of HUB subcontractors and general questions regarding HUB program compliance requirements;
5. Communication between an attorney representing a vendor and an attorney representing the District;
6. Communication with the District in the course of attendance at vendor conference;
7. Communication with the District for the purpose of the District's evaluation of the bidder's proposal, negotiating the scope of work, or engaging in contract negotiations;
8. Communication with the District for the purpose of making a public presentation to the Board; and
9. Communication made during the course of a formal protest hearing related to the solicitation.

*Other Vendor
Participation and
Communication*

Regardless of the above time period, a vendor and a vendor's representative who participate in the drafting or development of technical specifications or evaluation criteria for any project are prohibited from competing in the solicitation for such project.

A vendor and vendor's representative shall send all communications, questions, and requests for clarification in writing and addressed to the District's authorized representative identified in the solicitation. The District shall post responses to vendor questions as an addendum to the solicitation.

Nothing in this policy shall prohibit the District's representative from initiating contact with a vendor, in writing, for the purpose of obtaining clarifying information regarding a solicitation response. The vendor's response shall be in writing and shall be provided to the District's authorized representative.

PURCHASING AND ACQUISITION
VENDOR RELATIONS

CHE
(LOCAL)

- Complaints* Any person who is aggrieved in connection with a HUB program policy decision may file a complaint in accordance with GF(LOCAL).
- Violations* The following are violations subject to sanctions:
1. Falsely conceal or cover up a material fact or make any false, fictitious, or fraudulent statements, reports, or representations, or make use of any false writing, document, or electronic report knowing the same to contain any false, fictitious, or fraudulent statement.
 2. Fraudulently obtain, retain or attempt to obtain, or aid another in fraudulently obtaining, retaining, or attempting to obtain certification status as a HUB.
 3. Make false reports regarding payments made to subcontractors or sub-consultants.
- Sanctions* Any person who violates the provisions of this section shall be subject to the following sanctions and to the maximum penalties provided by law:
1. The District may bar, suspend, or deem nonresponsive in future District solicitations and contracts, for a period of up to five years, any bidder or proposer, or contractor or subcontractor following notice and an opportunity for a hearing in accordance with the protest procedures in this policy.
 2. The District may, by contract, and where appropriate and lawful, impose an administrative penalty.
 3. In addition to other sanctions available to the District, the violation of any provision of these program rules may be included as an incident of breach in each contract.
- Request for Proposal and Bid Invitation* Each request for proposal and bid invitation shall include a copy of this policy.