



21st Century Charter School at Gary

**Request for Quotes (RFQ)
HVAC Preventative
Maintenance**

May 3, 2024

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SECTION 1: OVERVIEW

- A. 21st Century Charter School at Gary, Inc. (“21C” or the “school”) is an Indiana charter school located in Gary, Indiana. 21C serves students in grades K-12 with a total enrollment of ~1,300 students, with plans to support up to 1,600 students.
- B. **GENERAL SCOPE.** 21C is currently requesting proposals for a service contract from a qualified HVAC provider for quarterly preventative maintenance on a wide array of HVAC units across four buildings consisting of the 21C campus. This service is to be provided on HVAC units serving the following buildings:
- a. 556 Washington St. Gary, IN 46402, a dual level building consisting of approximately 26,000 square feet;
 - b. 724 Washington St. Gary, IN 46402, a two-story building consisting of approximately 40,000 square feet;
 - c. 1440 E. 35th Ave. Gary, IN 46409, the three-level building on the north end of the campus consisting of approximately 72,000 square feet; and
 - d. 1440 E. 35th Ave. Gary, IN 46409, the recently renovated two-level building on the south end of the campus consisting of approximately 50,000 square feet.

The four separate buildings are varied in age and have multiple makes/types of HVAC systems, including traditional air handling units and Daiken VRF systems at the 724 Washington Street buildings. The successful bidder will have technicians with expertise in a wide variety of HVAC systems.

C. SELECTION SCHEDULE

Advertisement: This RFQ will be published on 21C’s website from May 3, 2024 to May 17, 2024. Potential Bidders should seek on-site access to conduct walk-throughs during which they can conduct an inventory of all HVAC equipment.

Submission of Proposals Due: Proposals will be accepted until 5:00 PM CDT May 30, 2024.

Proposal Opening: Proposals will be opened at 5:00 PM CDT May 30, 2024.

Review of Submitted Proposals: May 30, 2024 through June 7, 2024.

Tentative Award Date: No later than June 13, 2024.

Bidder to Provide Equipment and Services: July 1, 2024.

- D. **AWARD OF CONTRACT.** The contract will be awarded to the Bidder whose proposal is determined to be the most advantageous to the school, taking into consideration evaluation factors set forth in the RFQ. No other factors or criteria will be used in the evaluation. The final determination shall be in writing. The contract file will contain the basis on which the award is made. The school can reject any

and all proposals, and it can waive any informality or technicality in any proposal received if it determines it would serve the best interests of the school. Following the award decision, all Bidders will be notified and all proposals become public information.

21C reserves the right to award any contracts(s) as a whole or split award between competing parties. 21C reserves the right to evaluate the proposal for each item separately. Selection of a proposal does not mean that all aspects of the proposal are acceptable. 21C reserves the right to discuss proposals and negotiate modification of the proposal prices, terms, quantity, and conditions with any responsive, responsible quoting party who submits a proposal determined to be reasonably susceptible of being selected for the award, in conjunction with the award criteria contained herein, prior to the selection of the accepted proposal and/or the execution of a contract, to ensure satisfactory procurement.

- E. **EVALUATION CRITERIA.** Awards will be made to the lowest, responsible, and responsive Bidder(s) whose bid or proposal meets the requirements and criteria set forth by the school and whose offer is determined to be the most advantageous to the school, taking into consideration quality, performance, and the time specified in the proposal for the performance of the contract. Contract(s) shall be awarded to the person or entity that submits the best overall proposal as determined by the awarding authority using the criteria set forth below.

<u>Requirement(s)</u>	<u>Points</u>
Proposal Cost	50
Experience	20
Local Preference – Geographic Proximity	15
Quality of References	10
Personnel Qualifications	05

- F. **CONTACTS.** Except for the designated contacts listed below, Bidders are not permitted to communicate with 21C staff regarding this solicitation during the period between the RFQ issue date and the announcement of the award.
- G. **QUOTES.** All quotes should include detailed line items and subtotals along with the total price. All proposals must indicate that they are valid for no less than ninety (90) days from the proposal due date.

The Bidder's written proposal will be the basis for selection. However, following initial screening of all quotes received, 21C may request additional information, clarification, or an onsite presentation.

By submitting a quote, the Bidder represents it has read and clearly understands this RFQ and it is capable of providing the required services on the agreed contract commencement date.

- H. **COLLUSION.** Bidders are not to collude with other Bidders and competitors or take any other action which will restrict competition. Evidence of such activity will result in rejection of the quote.

SECTION 2: PROPOSAL INFORMATION

- A. Proposals must be submitted by the due date and time and in compliance with Section 3 of this RFQ.
- B. The goods and services required and offered in a proposal should meet the needs described below. Only one proposal may be submitted and considered per Bidder. Bidders may include any special or unique services they plan to provide.
- C. Submission of a proposal will be construed to mean that the Bidder understands the requirements contained herein, and the Bidder can supply the described services.
- D. A register of proposals will be prepared and shall be open for public inspection after the contract is awarded. The school will cooperate with all potential Bidders, to the extent reasonably possible, in their attempt to obtain information. Discussions may be conducted with Bidders who submit proposals for the purpose of assuring full understanding of, and responsiveness to, the solicitation requirements.
- E. Selection of the successful Bidder will form a contract pursuant to which the successful Bidder must honor for the school the prices for the equipment and services along with the other terms and conditions outlined in the successful proposal. All pricing and other terms must be honored through June 30, 2025, following award of the contract. Therefore, if selected, the successful Bidder must be prepared to execute an agreement with the school pursuant to which it will provide the services and equipment on the terms and conditions outlined in the successful proposal. The successful Bidder must be willing to enter into an agreement with the school upon terms and conditions specified in this RFQ and otherwise satisfactory to the school.
- F. It is understood that the school reserves the right to accept or reject any or all proposals and/or to waive any or all formalities in any proposal or in the proposal process deemed to be in the best interests of the school. No agreement exists until a contract is approved and executed by the school.
- G. Proposals received by any unapproved form are not acceptable and will not be considered.
- H. All inquiries, questions or requests for clarification must be submitted via email to Jeff Lozer at jlozer@geoacademies.org and Pete Morikis at pmorikis@geoacademies.org, and received prior to the Submission of Proposals Due date and time.
- I. This RFQ does not obligate the school to pay for any costs of any kind whatsoever that may be incurred by a Bidder or any third parties in connection with a response proposal. All responses and supporting documentation shall become property of the school. Further, the school shall not be liable to any Bidder, person, or entity for any losses, expenses, costs, claims or damages of any kind arising out of, by reason of, or attributable to, the Bidder responding to this RFQ.
- J. Acceptance of an offer by the school does not obligate the school to enter into a contract with or purchase any item from the Bidder.

SECTION 3: PROPOSAL REQUIREMENTS

Potential Bidders are hereby invited to submit a proposal to be 21C's HVAC Preventative Maintenance Provider.

FORMS. It is mandatory that each proposal contain the forms listed in Appendix A.

SUBMISSION. Proposals must be submitted by email to Jeff Lozer at jlozer@geoacademies.org in PDF format. The email message submitting the proposal must have a subject line reading "PROPOSAL FOR 21C HVAC PREVENTATIVE MAINTENANCE SERVICES" and be submitted on or before the **Submission of Proposals Due** date and time.

SECTION 4: PROPOSAL SPECIFICATIONS

- A. The HVAC Preventative Maintenance Services Provider will be expected to act as an independent contractor in the delivery of the described services to the school.
- B. The successful proposal must satisfy the requirements set forth herein. Each Bidder must provide a response in their proposal, in narrative format, to each of the following components.
 - a. **Qualifications and References.** Each Bidder must provide the following information:
 - i. A brief outline of the company and the number of years in business, and the number of people it currently employs.
 - ii. Include a list of references that the school may contact to discuss your past performance and evaluate your ability to perform the required services.
 - b. **Scope of Work, Specifications, and Requirements**
 - i. 556 Washington St., Gary, IN. This is a dual level building built in 2005 and consisting of approximately 26,000 square feet of usable area.
 - ii. 724 Washington St., Gary, IN. This is a two-story building built in 2014 and consisting of approximately 40,000 square feet of usable area.
 - iii. 1440 E. 35th Ave. Gary, IN. This is a three-level building on the north end of the campus, built approximately in 1995 and consisting of approximately 72,000 square feet of usable area. The building was formerly owned by Ivy Tech University and transferred to the school in 2019.

c. Budget and Estimated Pricing.

- i. **Materials.** Bidders shall provide a separate cost breakdown of the cost for materials (filters, refrigerant, belts, etc.).
- ii. **Labor.** All Bidders must provide a cost breakdown for labor costs assessed for each building. The labor cost breakdown for each building shall include the amount of hours bid and the average hourly labor cost assessed for those hours.

SECTION 5: EVALUATION CRITERIA

Note: Proposals that are not compliant with proposal specifications will not be considered.

Proposal Cost (50 Points): This criterion is based on the Bidder's budget and estimated pricing for providing the HVAC Preventative Maintenance Services. This includes the Bidder's ability to provide a budget that is thorough, specific, and supports the needs of the school. The points assigned to each Bidders cost proposal will be based on the lowest proposal price. The Bidder with the lowest Proposed Price will receive 100% of the price points. All other Bidders will receive a portion of the total cost points based on what percentage higher their Proposed Price is than the Lowest Proposed Price. The formula to compute the points is: $\text{Cost Points} \times (\text{Lowest Proposed Price} / \text{Proposed Price})$

Experience (20 points): This criterion is based on the overall depth and quality of the Bidder's experience providing the required services to schools (or similar institutions) as demonstrated in the proposal.

Local Preference – Geographic Proximity (15 points): This criterion is based on the Bidder's geographic proximity to 21C's schools. A Bidder's proximity to the school will be weighed more heavily.

Quality of References (10 points): This criterion is based on the information obtained regarding the quality of the Bidder's services from the references provided. Information obtained from references that are schools will be weighed more heavily.

Personnel Qualifications (5 points): This criterion is based on the qualifications of the Bidder's management and customer facing personnel and the total number of years in the field of laborers identified for the project.

Total points available based on Evaluation Criteria: 100 points

APPENDIX A REQUIRED RESPONSE FORMS

Instructions: The following forms **MUST** be completed and submitted as part of the Proposal.

Appendix A01: Contractor Cover Letter with Information

Appendix A02: Pricing Proposal for Services

Appendix A03: Service Proposal

Appendix A04: Subcontractors

Appendix A05: References

A Proposal must include a completed copy of each form, in the order listed above. Failure to submit each of the above forms may cause for rejection of a Proposal.

APPENDIX A1 CONTRACTOR COVER LETTER WITH INFORMATION

Prospective Bidders are required to submit a written "Contractor Cover Letter with Information" via email. By submitting a "Contractor Cover Letter with Information", a prospective Bidder will receive future amendments and notices concerning this RFQ.

It is mandatory that each proposal contain a cover letter which includes the following:

- A statement of the Bidder's intent to provide the services outlined in the proposal;
- The complete company name and address;
- The company contact person's name, phone number, and email address;
- The company's website, if applicable;
- The signature of the company's authorized representative, including position/title;
- The date of submission.

Submission of a proposal will be construed to mean that the Bidder understands the requirements contained herein, and the Bidder can supply the described services.

Authorized signature in the cover letter certifies that the Proposal as submitted complies with all Terms and Conditions as set forth in this RFQ.

Authorized signature also certifies that this company has no business or personal relationships with any other company or person that could be considered a conflict of interest or potential conflict of interest with 21C, and that there are no principals, officers, agents, employees, or representatives of this company that have any business or personal relations with any other companies or persons that could be considered a conflict of interest or a potential conflict of interest with 21C, pertaining to any and all work or services to be performed as a result of this RFQ and any resulting Contract with 21C.

Prospective Bidders should email this information and the proposal to:

21st Century Charter School

**c/o Jeff Lozer
Chief Operations Officer
Greater Education Opportunities Foundation
jlozer@geoacademies.org**

and

**c/o Pete Morikis
Executive Director
21st Century Charter School at Gary
pmorikis@geoacademies.org**

APPENDIX A2 PRICING PROPOSAL

1. **LABOR.** Complete and submit pricing for each project.

Project	Hours	Hourly Rate	Total Labor Cost
556 Washington St., Gary, IN			
724 Washington St., Gary, IN			
1440 E. 35 th Ave., Gary, IN			

2. **MATERIALS.** Complete and submit pricing and specifications for each project.

Project	Filters	Refrigerant	Belts	Other (describe)	Total Cost
556 Washington St., Gary, IN					
724 Washington St., Gary, IN					
1440 E. 35 th Ave., Gary, IN					

APPENDIX A3 SERVICE PROPOSAL

Prospective Bidders are required to submit a response to the proposal specifications in Section 4 Proposal Specifications.

APPENDIX A4 SUBCONTRACTORS

List any subcontractors that will or may be used. Provide the following:

Subcontractor Name

Subcontractor Address

Subcontractor Phone Number

Have you worked with this subcontractor within the last 12 months?

What scope of work will this subcontractor perform?

APPENDIX A5 REFERENCES

Please list the entities for which your company currently provides any of the services contemplated by this RFQ. Attach an additional sheet if necessary.

Preference is given for K-12 schools for which this service is currently being performed by your company, or has been performed within the past three (3) years by your company.

REFERENCE INFORMATION

Reference Company/Organization Name:

Contact Name:

Contact Phone Number:

Date of Service Initiation:

Date of Service Completion:

Services Provided