SHAWNEE MISSION SCHOOL DISTRICT Contact information: Shawnee Mission School District Purchasing Department 8200 W. 71st Street Shawnee Mission, Kansas 66204 **ATTN: Reed Beebe** **Please note that vendors may request a copy of this RFQ in Word format by emailing purchasing@smsd.org.**	DATE: October 14, 2024 RFQ NO. 24-019 RFQ TITLE: **HVAC Control System Solution** Responses will be accepted until: Date: **October 30, 2024** Day: **Wednesday** Time: **11:00 a.m. (local time)** **Terms, conditions, and specifications under which responses are requested are included. Please review thoroughly.**

Introduction:

The Shawnee Mission School District ("the District") requests a written response to this Request for Qualifications ("RFQ") for the purpose of obtaining information from qualified vendors interested in providing a heating, ventilation, and air conditioning ("HVAC") control system solution capable of meeting the District's needs.

This is a request for qualification information only; this RFQ is issued by the District solely for its information and planning purposes, and the RFQ does not commit the District to contract for any supplies or services whatsoever.

The District, at this time, is not seeking detailed proposals that outline specific pricing and terms and conditions, but the District intends to follow-up with selected vendor(s) that offer services that are of interest to the District, with possible subsequent negotiation of a multi-year contract with the desired vendor(s).

All RFQ responses shall be delivered, and shall adhere to the format, as further indicated herein. The District shall have the right to ask additional questions of – or request additional information from – responding vendors. The responses may, upon review by District staff, result in a qualified list of vendors for the products and services requested in this RFQ; should this occur, finalists will be notified, and formal proposals will be requested that include specific pricing and other terms and conditions for the District's consideration.

This RFQ includes an overview of the District's HVAC control system needs. Due to the number of District HVAC components distributed across various locations, the District currently would prefer not to share detailed current HVAC equipment lists through this RFQ process, but would make such information available later to vendors selected for additional discussions/proposal requests/negotiations through the RFQ process.

Overview:

The Shawnee Mission School District is located in suburban northeast Johnson County, Kansas, ten miles from downtown Kansas City, Missouri. The District is the third largest school district in the state of Kansas and is dedicated to guiding students to success.

The District has over fifty-eight (58) buildings utilizing various HVAC units from various manufacturers (Trane, Johnson Controls, Seimans, etc.) The District currently utilizes two HVAC control system solutions (one provided by vendor Elite Automation, and one provide by vendor Automated Control Systems), and the District is interested in moving to one HVAC control system solution for all its HVAC equipment. The District is also interested in selecting a vendor that can install and provide warranty maintenance on the selected HVAC control system solution, with the possibility of entering into a multi-year service maintenance agreement that extends beyond the equipment warranty period.

Desired Features/Services:

The District currently desires the following HVAC control system features, and related vendor services:

- **System Compatibility:** The ability to work with a wide variety of HVAC equipment brands.
- **System Energy Efficiency:** The ability to potentially improve energy efficiency by monitoring usage, adjusting performance based on occupancy, and setting specific set points.
- **System Ease of Use:** The ability to provide a user-friendly interface that makes it easy for District staff to program and adjust settings, along with the ability to provide training to staff on system.
- **System Remote Access:** The ability to offer remote access via a web-based program so that settings can be adjusted from anywhere.
- **System Energy Reporting:** The ability to provide detailed energy usage reports to help identify opportunities for savings.
- **System Support of Analog Inputs/Outputs:** The ability to support analog inputs (such as temperature sensors) and outputs (such as voltage or current signals).

- **System Lighting Integration:** The ability to integrate with building lighting controls. **NOTE:** while the District can consider solutions that do not integrate lighting controls, the District has an interest in this feature.
- **Vendor Staffing:** The ability to provide skilled and knowledgeable staff capable of developing and executing a HVAC control system implementation plan, as well as provide quality support services.
- **Vendor Operations:** The ability to furnish labor, equipment, tools, supplies, and materials required to implement a HVAC control system solution and provide support service for this solution as needed, on a timely basis.

The selected vendor's staff must be able to pass a background check performed on the District's RAPTOR system, in order to work on school property. (For context, RAPTOR is a visitor registration system that enhances school security by reading visitors' government-issued photo identification, comparing this information to a national sex offender database; if no match is found, the District prints a visitor badge to be worn while on school grounds. Additional vendor data is not gathered or shared with any outside company or organization.)

Desired Budget and Implementation Timeframe:

The District currently anticipates that the HVAC control system implementation will be a phased multi-year endeavor, with a number of locations selected each year for the upgrades. The District would work with selected vendor(s) to determine this schedule. The District currently anticipates that the upgrade project could take approximately three years for full implementation.

The District currently has established no firm budget for the HVAC control system implementation outlined in this RFQ, but anticipates that the District will spend an average of $3 million per year over the course of the projected three-year implementation.

However, at this time the District is interested in gauging general cost ranges (the vendor's average cost per square foot for an HVAC control system implementation). The District currently anticipates that work with a selected vendor would commence sometime prior to July 1, 2025.

RFQ Response Requirements:

Submitted responses should be limited to the sections and items identified below. The capacity of the respondent to make a complete and responsive presentation will be favorably considered.

Submittals should contain the following items:

A. **Letter of Interest:** Provide a brief letter expressing the respondent's interest and appropriate qualifications. The letter of interest should include the following information:
   - Title of this RFQ **("RFQ 24-019: HVAC Control System Solution");**
   - Name and mailing address of respondent (including physical location, if mailing address is a P.O. Box);
   - Contact person, telephone number, and email.

B. **Completion of Exhibit A Questionnaire:** Respond to the questions listed in **Exhibit A**. Please note that a Word copy of this RFQ, including Exhibit A, can be requested by emailing purchasing@smsd.org.

C. **Completion of Exhibit B Checklist:** Please check "Yes" or "No" regarding your firm's ability to provide the desired features and services listed in the provided checklist. You may also use this checklist to clarify or provide additional information regarding your firm's ability to provide services that addresses the District's desired services. Please note that a Word copy of this RFQ, including Exhibit B, can be requested by emailing purchasing@smsd.org.

D. **References:** Provide three (3) references for similar services provided within the last five (5) years, to institutions of similar size and needs to the District. Provide a brief description of the services provided. While specific reference contacts (client names, email addresses, etc.) do not have to be provided at this time, if a vendor is selected for subsequent negotiations/discussions/interviews, the vendor may be asked to provide specific reference contact names, addresses, and telephone numbers that can provide feedback on the proposed products and services.

Response Submittal Instructions:

Responses shall be submitted no later than the time and date indicated herein. Responses submitted to a location or individual other than that listed below will not be considered duly delivered or timely. The District shall not be responsible for re-routing responses delivered to a person or location other than that specified below. Late response submittals shall not be accepted or considered. All responses, whether accepted or rejected, shall become the property of the District and will not be returned. The District reserves the right to waive minor defects and/or irregularities in response submittals and shall be the sole judge of the materiality of any such defect or irregularity. The District reserves the right to seek additional responses if the received responses are deemed unsatisfactory. All costs associated with response preparation shall be borne by the respondent.

Responses may be submitted in hardcopy format (one physical copy, **along with a thumb drive containing a digital copy of the response**) to the **"Official Contact**" address listed in this RFQ, and shall be received by delivery in person or via service (US

Mail, UPS, FedEx, etc.) in a sealed envelope or box. Electronic delivery (i.e., email) will not be accepted.

All responses must be received no later than **11:00 a.m. (local time), Wednesday, October 30, 2024**, and should be clearly marked **"RFQ 24-019 – HVAC Control System Solution."**

Please note that vendors may request a copy of this RFQ in Word format by emailing purchasing@smsd.org.

Official Contact/Deadline for Questions:

Additional feedback or questions may be addressed by the official contact below:

Reed Beebe
Shawnee Mission School District
8200 W. 71st Street
Shawnee Mission, KS 66204
913-993-6475
purchasing@smsd.org

All questions concerning this RFQ must be received no later than **Monday, October 21, 2024 by 4:00 p.m. (local time).** The District will address questions via addenda (see **"Addenda/Cancellation"** below); it is currently anticipated that any applicable addenda will be issued by **Tuesday, October 22, 2024 by 4:00 p.m. (local time).**

Response and Response Evaluation Availability:

To the extent allowed by the laws of the State of Kansas, including the Kansas Open Records Act (K.S.A. 45-215 *et seq.*), responses received by the District will not be open to public review, nor disclosed to unauthorized persons, prior to award of a contract (or a decision by the District not to award a contract) for the services listed in the RFQ. Likewise, the District's evaluation documentation of the received responses will not be open to public review nor disclosed to unauthorized persons, prior to award of a contract/decision not to award. Thereafter, all responses and related evaluation documentation shall be open to public inspection.

Addenda/Cancellation:

The District may modify or cancel this RFQ at any time prior to the RFQ due date by issuance of an Addendum or Cancellation. Such Addenda and/or Cancellations will be posted on the District's website, currently: **smsd.org** (**Go to About; Department Teams; Purchasing & Bidding; Bids & Bid Summaries View Page.**

Selection Criteria:

After the District's initial review of submitted responses, the District intends to choose one (1) to three (3) highly qualified vendors considered best qualified and capable of providing/performing the desired products/services outlined in this RFQ and, if desired, request interviews or discussions with select vendors.

Once the District has selected a list of one to three qualified vendors, the District's intent is to request detailed proposals for HVAC control system implementation services from this vendor list, for the District's consideration. However, at its sole discretion, the District reserves the right not to seek or solicit, or accept, subsequent proposals for these services if the District decides not to proceed with the upgrades.

The following criteria will be used by the District to evaluate the RFQ responses:

- The response's adequacy in providing the desired information outlined in this RFQ;
- The respondent's provided past client reference list indicates past work with clients of similar size and needs to the District;
- The respondent's qualifications, including education, training, licenses, experience, and past performance of the respondent's agents, employees, and (if applicable) sub-contractors;
- The desirability to the District of the typical pricing information in relation to the District's needs;
- The respondent's ability to provide the desired product and services outlined in the RFQ

Confidentiality of Respondent Information:

The District is a state agency, and information submitted to the District in response to District solicitations for product or service information is generally a public record. Accordingly, no response shall restrict the District's ability to produce the solicitation response and/or any corresponding documents in response to a lawful request or from otherwise complying with the Kansas Open Records Act (K.S.A. 45-215 *et seq*.)

Confidentiality of District Information:

Respondent acknowledges that any information provided by or obtained from the District in connection with this RFQ is the sole property of the District and must be treated as confidential, and that this confidential information is not to be used for any purpose other than replying to this RFQ, and that this confidential information must not be disclosed without the prior written authorization of the District, and, if applicable, that this confidential information must be returned to the District immediately upon the request of the District.

Pricing/Cost Model Information for General Information Purposes Only:

Any pricing/cost model information provided by respondents is for general information purposes and is not intended to be binding on respondents. Any legally binding pricing or purchasing commitments will be established only when specified by the express terms of a subsequent bid or negotiation process, or where established through the execution of a written agreement.

The District understands that specific pricing will be determined by the products and services selected by the District, and at this time the District is interested in information regarding general pricing structure options and general cost ranges, not a finalized price quote.

Information in RFQ Only an Estimate:

The District and its representatives make no representations, warranty, or guarantee as to the accuracy of the information contained in the RFQ or issued via addenda. Any quantities or data contained in this RFQ or related addenda are good-faith estimates provided only as general background information.

Governing Law:

It is understood and agreed that the construction and interpretation of this RFQ and related addenda shall be governed by the laws of the State of Kansas.

EXHIBIT A: QUESTIONNAIRE

Please respond to the questions below; a Word copy of the RFQ, including Exhibit A, can be requested by emailing purchasing@smsd.org. In addition to completing this questionnaire, please provide a letter of interest and references, along with completing Exhibit B, as outlined on page 4 of this RFQ.

1. Please discuss your firm's qualifications; specifically, please provide a general overview of your staff's applicable education, training, licenses, experience and past performance. Please include information regarding your firm's years of operation and service to institutions of similar size and needs to the District, as well as general information about your staffing size.

2. Please discuss your firm's ability to develop and implement a turnkey HVAC control system solution. How does your firm typically work with clients on implementing an HVAC control system solution? What is a typical timeframe to develop a proposed implementation plan, from the date of a client's request for such a proposal to the finalization of such a plan? Once a plan is developed and a client authorizes you to proceed, how long does a typical implementation take your firm, from authorization to completion. Is your firm able to work over the course of a multi-year implementation plan, if desired?

3. Please discuss your firm's ability to provide updates, upgrades, and troubleshooting services on your proposed HVAC control system solution. Once an annual warranty period has expired, is your firm able to provide ongoing year-to-year maintenance and support services via a service contract? Alternatively, does your solution allow for maintenance services from another firm if the District decided to utilize another vendor for maintenance services?

4. Please discuss your firm's ability to provide an HVAC control system solution that works with a wide variety of HVAC equipment brands. What HVAC equipment brands does your solution typically regulate?

5. Please discuss how your proposed HVAC control system solution allows for ease of use by District staff. Does your solution feature a user-friendly interface?

6. Please discuss whether your proposed HVAC control system solution typically allows for integration with building lighting controls.

7. Please discuss whether your proposed HVAC control system solution can provide detailed energy usage reports.

8. Please discuss whether your proposed HVAC control system solution can monitor energy usage, adjust performance based on occupancy, and setting specific set points.

9. Please discuss whether your proposed HVAC control system solution can offer remote access via a web-based program so that settings can be adjusted from anywhere.

10. The District understands that final costs for services and materials are contingent upon final products and services selected by the District, and the District is not seeking a formal or binding quote at this time. However, based on the District's needs as identified in this RFQ, the District would appreciate your firm's typical pricing information for an HVAC control system implementation similar to the District's needs, with an average dollar cost per square foot for such an implementation.

11. Is there any additional information about the capabilities of your firm's ability to meet the needs of the District, not addressed in the questions above or in the District's checklist of desired services, that you would like to share? You are welcome to submit any additional information materials (brochures, online links, etc.) that you think may be of interest to the District.

EXHIBIT B: DESIRED SERVICES CHECKLIST

Please check "Yes" or "No" regarding your firm's ability to provide the desired HVAC control system solution and related services listed below; a Word copy of the RFQ, including Exhibit B, can be requested by emailing purchasing@smsd.org. In addition to completing this questionnaire, please provide a letter of interest and references, along with completing Exhibit A, as outlined on page 4 of this RFQ. **NOTE: The District understands that some firms may not be able to provide all of the desired services listed below, and the inability of a firm to provide all desired features is not automatically disqualifying for consideration.** The checklist below is meant to help District staff gauge which desired services may be available from a vendor.

Desired Features/Services	Yes	No
System Compatibility: The ability to work with a wide variety of HVAC equipment brands.		
System Energy Efficiency: The ability to potentially improve energy efficiency by monitoring usage, adjusting performance based on occupancy, and setting specific set points.		
System Ease of Use: The ability to provide a user-friendly interface that makes it easy for District staff to program and adjust settings.		
System Remote Access: The ability to offer remote access via a web-based program so that settings can be adjusted from anywhere.		
System Energy Reporting: The ability to provide detailed energy usage reports to help identify opportunities for savings.		
System Lighting Integration: The ability to integrate with building lighting controls.		
Vendor Staffing: The ability to provide skilled and knowledgeable staff capable of developing and executing a HVAC control system implementation plan, as well as provide quality support services.		
Vendor Operations: The ability to furnish labor, equipment, tools, supplies, and materials required to implement a HVAC control system solution and provide support service for this solution as needed, on a timely basis.		

CLARIFICATIONS -- If you would like to clarify or provide additional information regarding your firm's ability to provide services that addresses the District's needs, you may do so below: