



**GEO ACADEMIES INDIANA HOLDINGS,  
LLC on behalf of GEO NEXT  
GENERATION ACADEMY**

**Request for Proposal (RFP)  
REPLACEMENT OF  
BUILDING VRF HVAC  
SYSTEM**

**December 18, 2024**

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## SECTION 1: OVERVIEW

- A. GEO Next Generation Academy (“NGIN” or the “school”) is an Indiana charter school located in Indianapolis, Indiana. NGIN serves students in grades K-12 with a total enrollment of ~550 students, with plans to support up to 1,000 students.
- B. **GENERAL SCOPE.** NGIN is currently requesting proposals from HVAC providers for comprehensive replacement of the school’s VRF systems located at 4010 N. Sherman Drive, Indianapolis, IN 46226. The selected vendor will be responsible for removing the equipment to be replaced, installing or repairing refrigerant lines and associated infrastructure (valves, etc.), installing newer generation equipment and controls, testing the newly installed equipment, and providing any additional labor or materials necessary for the successful completion of the project.

More detailed requirements can be found below.

### C. **SELECTION SCHEDULE**

**Advertisement:** This RFP will be published on NGIN’s website from December 18, 2024, to March 21, 2025. Potential Bidders seeking on-site access to conduct walk-throughs and measurements are invited to attend an in-person pre-bid meeting that will take place on Friday, January 24, 2025, at 9:00 a.m. (EST) 4010 N. Sherman Drive, Indianapolis, IN 46226.

**Submission of Proposals Due:** Proposals will be accepted until 5:00 PM EST March 21, 2025.

**Proposal Opening:** Proposals will be opened at 5:00 PM EST March 21, 2025.

**Review of Submitted Proposals:** March 21, 2025, through April 4, 2025 (Committee Review).

**Tentative Award Date:** Approximately April 18, 2025, after board approval.

**Bidder to Provide Equipment and Services:** June 1, 2025.

- 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 RFP. 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.

NGIN reserves the right to award any contracts(s) as a whole or split award between competing parties. NGIN 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. NGIN 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.

<b>Requirement(s)</b>	<b>Points</b>
Proposal Cost	50
Experience	20
Installation Process and Timeline	20
Quality of References	05
Personnel Qualifications	05

- F. **CONTACTS.** Except for the designated contacts listed below, Bidders are not permitted to communicate with NGIN staff regarding this solicitation during the period between the RFP issue date and the announcement of the award.

Jeff Lozer, COO, [jlozer@geoacademies.org](mailto:jlozer@geoacademies.org)

Daniel Criswell, Maintenance Manager, [dcriswell@geoacademies.org](mailto:dcriswell@geoacademies.org)

- 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, NGIN may request additional information, clarification, or an onsite presentation.

By submitting a quote, the Bidder represents it has read and clearly understands this RFP 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 RFP.
- 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, 2026, 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 RFP 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's Board of Directors.
- 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](mailto:jlozer@geoacademies.org) and received prior to the Submission of Proposals Due date and time.
- I. This RFP 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 RFP.
- 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, and no agreement to purchase will exist on the part of the school until an agreement is properly approved by the school's Board of Directors.

## SECTION 3: PROPOSAL REQUIREMENTS

Potential Bidders are hereby invited to submit a proposal to be NGIN's VRF HVAC System Replacement 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](mailto:jlozer@geoacademies.org) in PDF format. The email message submitting the proposal must have a subject line reading "PROPOSAL FOR NGIN VRF HVAC SYSTEM REPLACEMENT" and be submitted on or before the **Submission of Proposals Due** date and time.

## SECTION 4: PROPOSAL SPECIFICATIONS

- A. The VRF HVAC System Replacement 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. The company's successful track record of installing and replacing VRF HVAC systems, with emphasis on installations and replacements in school settings.
    - iii. 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**

GEO Academies Indiana Holdings, LLC ("Owner") acquired the properties of 4010 and 4020 North Sherman Drive, consisting of two school buildings, in April 2021. The buildings were constructed in 2012 and 2013 and occupied by the prior owner through June 2019.

This RFP relates to the 4010 N. Sherman building. This building has three classroom wings. Each wing is heated and cooled by a LG series 3 VRF system. We have experienced a consistent series of failures resulting in high repair bills. We have had several commercial heating and cooling vendors out to the property to diagnose and fix various issues (compressor failure, refrigerant leaks, control board failures, etc.).

During the course of those work visits, vendor representatives have commented on the following causes of the repeated problems we have experienced with the VRF units, including improper installation during the initial construction ([please see link to "As-Built specifications"](#)),

the vulnerability of the VRF systems to power surges, and the propensity of the VRF systems to leak, resulting in system shutdown and/or compressor failure.

**Request:** The Owner requests bids on full replacement of the current VRF units with newer generation VRF commercial systems. This will require some degree of re-piping and valve replacement for the refrigerant lines. The Owner, through vendor conversations, believes that only the roof top units and the roof top piping need to be replaced (as well as some piping running from the roof top to the individual classrooms, as needed) and that the existing classroom cassettes can remain. However, vendors submitting quotes may quote classroom cassette replacement as a separate line item. Replacement quotes should include:

1. the cost of the equipment;
2. any warranties available (with copy of the actual warranty);
3. the cost of labor that is inclusive of removing the existing roof top units, installing new lines and connective equipment such as valves, installing the replacement units, electrical connectivity, and any additional charges;
4. as deemed necessary by the vendor responding to this RFP, the material and labor cost of replacing some or all of the classroom cassette units;
5. as deemed necessary by the vendor responding to this RFP, any additional material and labor costs not specified in this RFP but which are essential to successful project completion.

Responsive quotes must include a timetable for installation and a preliminary project schedule. The timetable and project schedule should accommodate the calendars of the schools occupying the building, taking advantage of summer break and night and weekend work.

- c. **Cost Proposal** The Bidder shall provide the total cost for the project, itemized by major category of expense, including but not limited to equipment cost, labor cost, cost of permitting or other regulatory expense.

## 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 equipment, materials and labor. 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 specificity, depth and quality of the Bidder's experience providing the required services to schools (or similar institutions) as demonstrated in the proposal.

**Installation Process and Timeline (20 points):** This criterion is based on the Bidder's timeline and project plan for the removal of the existing equipment and the installation of the new VRF HVAC system. The timeline and project plan should take advantage of the school's summer break (approximately June 1, 2025 to July 30, 2025) and the Bidder's ability to accommodate the school's need to maintain a school calendar that is as free from disruption as possible.

**Quality of References (5 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 individual service providers 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 A1: Contractor Cover Letter with Information

Appendix A2: Pricing Proposal for Labor and Materials

Appendix A3: Service Proposal

Appendix A4: Subcontractors

Appendix A5: References

Appendix A6: Familial Relationship Affidavit

Appendix A7: Non-Collusion Affidavit

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 RFP.

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 RFP.

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 NGIN, 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 NGIN, pertaining to any and all work or services to be performed as a result of this RFP and any resulting Contract with NGIN.

**Prospective Bidders should email this information and the proposal to:**

**GEO Academies, Inc. d/b/a GEO Next Generation Academy**

**c/o Jeff Lozer  
Chief Operations Officer  
Greater Education Opportunities Foundation  
[jlozer@geoacademies.org](mailto:jlozer@geoacademies.org)**

## APPENDIX A2 PRICING PROPOSAL

**1. Equipment:**

<b>Equipment</b>	<b>Units</b>	<b>Price Per Unit</b>	<b>Total Cost</b>
VRF Unit(s)			
Piping			
Controls			
Cassette Units (if needed)			
Refrigerant			
Other materials (please list as reasonably necessary)			

**2. Labor:**

<b>Labor</b>	<b>Man Hours</b>	<b>Price Per Hour</b>	<b>Total Cost</b>
Demo and removal of existing VRF units and controls			
Labor related to piping and running lines			
Labor relating to Control installation			
Labor related to installation of Cassette Units (if needed)			
Supervisory labor			
Third party labor (ex: crane or lift operation)			
Other Labor			

## **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 RFP. 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:

## APPENDIX A6 FAMILIAL RELATIONSHIP AFFIDAVIT

THE AFFIDAVIT SET FORTH BELOW MUST BE EXECUTED ON BEHALF OF THE Bidder AND FURNISHED WITH EVERY BID

### FAMILIAL RELATIONSHIP AFFIDAVIT

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_  
TAX ID#: \_\_\_\_\_

\_\_\_\_\_, being duly sworn, deposes and states that they are the \_\_\_\_\_ (title) of "Bidder," which has submitted to the School a Proposal to provide services as Interior Paint Services Provider, and hereby represents and warrants, except as provided below, that no familial relationships exist between the Bidder or any employee of the Bidder, the charter management company, and any member of the Board of NGIN or the staff of NGIN.

(If no exceptions, please state.)

\_\_\_\_\_  
List any Familial Relationships:

\_\_\_\_\_  
Affiant's Signature

On this \_\_\_\_\_ day of \_\_\_\_\_, 2025, before me, a Notary Public, in and for the above-referenced county, personally appeared \_\_\_\_\_, who made oath that they have read the foregoing Affidavit of Bidder – Familial Relationships, by they signed and that the contents thereof are true, except as to those matters stated therein to be based on information and belief, and as to those matters, he believes same to be true.

\_\_\_\_\_, Notary Public State of Indiana, County of \_\_\_\_\_  
My commission expires: \_\_\_\_\_,  
Acting in the County of \_\_\_\_\_, Indiana

## APPENDIX A7 NON-COLLUSION AFFIDAVIT

THE AFFIDAVIT SET FORTH BELOW MUST BE EXECUTED ON BEHALF OF THE Bidder AND  
FURNISHED WITH EVERY BID

### NON-COLLUSION AFFIDAVIT

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_  
TAX ID#: \_\_\_\_\_

\_\_\_\_\_, being duly sworn, deposes and states that they are the  
\_\_\_\_\_ (title) of "Bidder," which has submitted to the School a  
Proposal to provide services as the Interior Paint Services Provider. Except as specified below, the Bidder  
constitutes the only firm having any interest in the Proposal or in any contract, benefit or profit which may,  
might or could accrue as a result of said Proposal, said exceptions being as follows:

(If no exceptions, please state.)

\_\_\_\_\_  
Affiant further states that said Proposal is, in all respects, fair and is submitted without collusion or fraud, and  
that no employee, administrator or Board member of NGIN is directly or indirectly interested in the Proposal.

\_\_\_\_\_  
Affiant's Signature

On this \_\_\_\_\_ day of \_\_\_\_\_, 2025, before me, a Notary Public, in and for the above-  
referenced county, personally appeared \_\_\_\_\_, who made oath that they have read the  
foregoing Non-Collusion Affidavit, by they signed and that the contents thereof are true, except as to those  
matters stated therein to be based on information and belief, and as to those matters, he believes same to be  
true.

\_\_\_\_\_, Notary Public State of Indiana, County of \_\_\_\_\_  
My commission expires: \_\_\_\_\_,  
Acting in the County of \_\_\_\_\_, Indiana