

OLDHAM COUNTY BOARD OF EDUCATION

1900 Button Lane • La Grange, KY 40031 • (502) 255-6562

"Ignite Passion. Experience Excellence."

PUBLIC NOTICE INVITATION FOR BIDS (IFB)

IFB No. 2027-FAC-001 — District-Wide HVAC Air Filter Replacement Services

Notice is hereby given that the **Oldham County Board of Education ("OCBE" or "District")** will receive sealed bids for **District-Wide HVAC Air Filter Replacement Services**, consisting of the furnishing and installation of new HVAC air filters, in the sizes and quantities specified in the Invitation for Bids, at the school and administrative buildings identified in Bid Packages "A," "B," and "C," in accordance with KRS Chapter 45A (Kentucky Model Procurement Code), KRS 424, and applicable Board Policy.

Bidders may submit a price on Bid Package A, Bid Package B, Bid Package C (all District locations), or any combination thereof. The initial contract term is three (3) years, with one (1) optional one-year renewal at the District's sole discretion. The Contractor will be required to perform two (2) complete filter change events per fiscal year, to be substantially completed prior to the start of each semester (on or before August 10 and December 31, or the nearest preceding business day, of each contract year).

Issuing Office:	Oldham County Board of Education — Facilities Department
Bid Documents Available:	www.oldham.kyschools.us/district/bid-opportunities and by e-mail request to bids@oldham.kyschools.us
Written Questions Due:	Tuesday, July 14, 2026, by 10:00 a.m. EST, to stu.martin@oldham.kyschools.us
Sealed Bids Due / Public Bid Opening:	Tuesday, July 21, 2026, at 10:00 a.m. EST, at the OCBE Central Office, 1900 Button Lane, La Grange, KY 40031. Bids will be publicly opened and read aloud at that time.
Anticipated Board Award:	August 2026 regular meeting of the Oldham County Board of Education

Sealed bids must be clearly marked "IFB No. 2027-FAC-001 — HVAC Filter Replacement Services" and delivered to the OCBE Central Office by the date and time stated above. Late bids will not be accepted or considered. The District reserves the right to reject any or all bids, to waive informalities or technicalities, and to award the contract(s) deemed most advantageous to the District, in whole or by individual Bid Package, in accordance with KRS 45A.365.

The Oldham County Board of Education does not discriminate on the basis of race, color, national origin, sex, disability, or age in its programs and activities.

OLDHAM COUNTY BOARD OF EDUCATION

INVITATION FOR BIDS — IFB No. 2027-FAC-001

District-Wide HVAC Air Filter Replacement Services

Bid Packages A, B, and C

Issue Date:	July 8, 2026
Issuing Office:	Oldham County Board of Education — Facilities Department
District Contact:	Stu Martin, Plant & Operations Manager — stu.martin@oldham.kyschools.us
Director of Facilities Management:	Brent Bohannon — brent.bohannon@oldham.kyschools.us
Questions Due:	July 14, 2026, 10:00 a.m. EST
Bids Due / Public Bid Opening:	July 21, 2026, 10:00 a.m. EST
Anticipated Board Award:	August 2026 Board Meeting

Offerors are advised that any contract resulting from this Invitation for Bids must comply with KRS 424, KRS Chapter 45A (Kentucky Model Procurement Code), applicable OCBE Board Policy, and all applicable federal laws prior to becoming effective. A contract based on this IFB may or may not be awarded.

SECTION 10 — INTRODUCTION AND OVERVIEW

10.1 Purpose

The Oldham County Board of Education ("OCBE" or "the District") is soliciting sealed bids from qualified, responsible Contractors to furnish and install replacement HVAC air filters at District school and administrative buildings on a recurring, scheduled basis, in the sizes and quantities identified in Exhibit A (Bid Schedule), for the term described in Section 40.

10.2 Procurement Method

This solicitation is issued as an Invitation for Bids (IFB) utilizing Competitive Sealed Bidding pursuant to KRS 45A.365 and the Kentucky Model Procurement Code, KRS 45A.345–.460, as adopted by the District. The District has determined that the goods and services described herein are well-defined and quantifiable, and that price is the appropriate primary basis for award. Accordingly, an IFB — rather than a Request for Proposals — is the appropriate procurement method for this requirement. Requests for Proposals (RFP) utilizing competitive negotiation remain the District's method of procurement for professional and other services where qualitative, non-price factors are the primary basis for selection.

10.3 Issuing Office and District Contact

This IFB is issued by the OCBE Facilities Department. All communications concerning this IFB, including questions and requests for clarification, must be directed in writing to the District Contact identified on the cover page. Bidders shall not contact any other District employee, School Board member, or school-based staff regarding this solicitation. Unauthorized contact may result in disqualification of the bidder's submission.

10.4 Solicitation Timeline

Milestone	Date / Deadline
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IFB Issued / Advertised	July 8, 2026
Deadline for Written Questions	July 14, 2026, 10:00 a.m. EST
District Response to Questions (Addendum)	On or before July 17, 2026
Sealed Bids Due / Public Bid Opening	July 21, 2026, 10:00 a.m. EST
Anticipated Board Award	July 2026 regular Board meeting
Anticipated Contract Commencement	Upon execution; first change event coordinated with the 2026–2027 school start date

The District reserves the right to modify this timeline by written addendum posted to the District's Bid Opportunities webpage. It is the sole responsibility of the bidder to check for addenda prior to submitting a bid.

SECTION 20 — SCOPE OF WORK AND SPECIFICATIONS

20.1 General Description

The Contractor shall furnish all labor, materials, equipment, transportation, and supervision necessary to remove and replace HVAC air filters at each location included in the awarded Bid Package(s), in the sizes and quantities set forth in Exhibit A — Bid Schedule (attached separately as a companion workbook), and shall remove and lawfully dispose of all used filters.

20.2 Filter Change Frequency and Completion Windows

- Two (2) complete filter change events are required per fiscal year for each location within the awarded Bid Package(s).
- Fall Change Event: substantially completed on or before August 10 (or the last business day preceding the District's published start of the fall semester, whichever is earlier).
- Winter/Spring Change Event: substantially completed on or before December 31 (or the last business day preceding the District's published return date from winter break, whichever is earlier).
- The Contractor shall coordinate scheduling with the Facilities Department and individual building principals no less than ten (10) business days in advance of each change event to minimize disruption to instructional activities.
- "Substantial completion" means all filters at a given location have been replaced and the location is fully operational, subject only to minor punch-list items that do not affect building comfort, air quality, or code compliance.

20.3 Filter Specifications

- All replacement filters shall be new (not reconditioned or used), shall match the sizes specified in Exhibit A, and shall meet or exceed the MERV rating currently installed at each unit unless otherwise directed in writing by the Facilities Department.
- Filters marked "MERV 8" in Exhibit A shall be MERV 8 or better; all other filters shall be standard pleated, minimum MERV 8 equivalent, unless a different rating is noted for a specific unit.
- The Contractor shall verify exact filter dimensions and quantities for each unit prior to submitting a bid. Site visits may be arranged by contacting the District Contact identified on the cover page. The quantities in Exhibit A are based on the District's most current facilities count (FY26) and are provided for bidding purposes; final verified counts will govern actual billing.

- Three (3) line items in Exhibit A are marked "Field Verification Required": one (1) size at Centerfield Elementary and two (2) sizes at North Oldham High School. Quantities for these items could not be confirmed prior to issuance of this IFB. Bidders shall treat these as budgetary estimates only and confirm actual counts prior to submitting a bid; the District will issue a written addendum with confirmed quantities if available prior to bid opening.

20.4 Documentation and Verification

- The Contractor shall provide a completion log for each building, signed by the building principal or designee, confirming the date of service and the number of filters replaced by size.
- Photographic documentation (before/after, by mechanical room or representative sampling) shall be provided to the Facilities Department within five (5) business days of completion of each change event.
- The District reserves the right to conduct random post-service inspections to confirm filters were replaced as documented.

SECTION 30 — BID PACKAGES

This IFB is divided into three (3) Bid Packages. Bidders may bid on one, two, or all three packages. A bidder choosing to bid a package must submit pricing for every line item within that package's Bid Schedule; partial-package bids will be deemed non-responsive as to that package.

Bid Package	Description	Locations	Approx. Annual Filter Volume
A	Oldham County High School, Preschool, East Oldham Middle, Locust Grove Elementary, Crestwood Elementary, Kenwood Station Elementary, Goshen Elementary, District Central Office, and Oldham County Arts Center/Academy	9 locations	2,514 filters
B	Centerfield Elementary, Oldham County Middle, South Oldham Middle, South Oldham High, Arvin Education Center, North Oldham Middle, North Oldham High, Harmony Elementary, Buckner Elementary, Camden Station Elementary, and La Grange Elementary	11 locations	2,646 filters
C	All District locations listed under Bid Packages A and B (combined, district-wide)	20 locations	5,160 filters

Annual filter volume reflects two (2) change events per year at the per-change quantities listed in Exhibit A. See Exhibit A for full item-level detail, including filter sizes, per-change quantities, and MERV notations, by Bid Package.

Note: A school or administrative location's inclusion under Bid Package C is not an additional, separate obligation — Package C is offered so that a single Contractor may bid the entire District as one combined package. The District will award in the manner that is most advantageous to the District, which may include: (a) a single Contractor for all locations (Package C); (b) separate Contractors for Package A and Package B; or (c) any combination the District determines, in its sole discretion, provides the best value, in accordance with Section 60.

SECTION 40 — CONTRACT TERM AND PRICING

40.1 Contract Term

The initial contract term shall be three (3) years from the date of execution. The District may, at its sole discretion, extend the contract for one (1) additional one-year renewal term, under the same terms, conditions, and unit pricing (subject to Section 40.3), by written notice to the Contractor. The District is under no obligation to exercise the renewal option.

40.2 Award by Fiscal Year

The contract shall be structured and funded on a fiscal-year basis. The District's obligations under any resulting contract are subject to annual appropriation, and the contract shall automatically terminate at the end of any fiscal year for which funds are not appropriated, without penalty to the District.

40.3 Firm Pricing / Price Adjustment

- Unit prices bid shall remain firm for the initial three (3) year contract term and may not be increased during that period.
- A separate, optional unit price for the fourth-year renewal term may be submitted in Exhibit A. If a renewal-year price is not submitted, or if the District elects to exercise the renewal option, renewal-term pricing shall be negotiated between the District and the Contractor, based on documented, industry-wide cost changes, and is subject to the District's approval.
- Any Contractor-requested price adjustment for a renewal term must be submitted in writing no less than sixty (60) days prior to the renewal effective date, with supporting documentation.

40.4 Basis of Payment

Payment shall be based on the unit prices bid in Exhibit A, multiplied by the actual number of filters replaced (by size) at each completed, documented change event, consistent with Section 20.4. No payment will be made for undocumented or unverified filter replacements.

SECTION 50 — BID SUBMISSION REQUIREMENTS

1. Sealed bids must be submitted in a sealed envelope or package, clearly marked with the IFB number and title, and delivered to the OCBE Central Office at or before the date and time stated on the cover page. Bids received after the stated time will be rejected as non-responsive and returned unopened, regardless of the reason for the delay.
2. Each bid must include: (a) a completed and signed Bid Form (Attachment A); (b) a completed Exhibit A — Bid Schedule for each Bid Package bid; (c) a signed Pledge of Non-Discrimination (Attachment B); (d) a Certificate of Insurance evidencing the coverages required in Section 80.5; and (e) any additional documentation required by addendum.
3. Bids must be signed by an individual authorized to bind the bidder to a contract.
4. Bids shall remain valid and irrevocable for ninety (90) days from the bid opening date.
5. Bids will be publicly opened and the bidders' names and total prices read aloud at the time and place stated on the cover page. Bid tabulations will be posted to the District's Bid Opportunities webpage following the opening.
6. The District is not responsible for bids that are lost, delayed, or misdirected, regardless of cause.

SECTION 60 — BID EVALUATION AND AWARD

60.1 Basis of Award

Award will be made to the lowest responsive and responsible bidder, on a per-Bid-Package basis (or in combination, as described in Section 30), on the basis of the lowest total evaluated bid price for the applicable package(s), calculated as the Total 3-Year Price shown in Exhibit A. The Board of Education must approve all awards resulting from this IFB.

60.2 Responsiveness and Responsibility

A bid will be considered responsive only if it conforms in all material respects to the requirements of this IFB, including completion of every line item within a bid package and submission of all required attachments. The District will additionally evaluate bidder responsibility, including but not limited to: relevant experience servicing K-12 or comparable institutional facilities; availability of sufficient labor and equipment to complete each District-wide change event within the required window; references; and financial and licensing standing.

60.3 Reservation of Rights

The District reserves the right to reject any or all bids, in whole or in part; to waive minor informalities or irregularities in any bid; to award by individual line item, Bid Package, or combination of Bid Packages; and to make the award(s) deemed most advantageous to and in the best interest of the District. No bid may be withdrawn after the bid opening without the District's written consent.

SECTION 70 — BID SECURITY

No bid bond or bid security deposit is required for submission of a bid under this IFB. The District reserves the right to require a Performance Bond or other security from the successful bidder(s) prior to contract execution if the District determines, in its discretion, that the scope or value of an awarded package warrants such security. Any such requirement will be identified in the notice of award.

SECTION 80 — GENERAL TERMS AND CONDITIONS

80.1 Compliance with Law

The Contractor shall at all times comply with all applicable federal, state, and local laws, ordinances, regulations, and codes, including but not limited to OSHA workplace safety requirements and applicable environmental regulations governing the handling and disposal of used HVAC filters.

80.2 Non-Discrimination

The Contractor shall not discriminate against any employee, applicant for employment, or member of the public on the basis of race, color, religion, sex, national origin, age, or disability, consistent with the Pledge of Non-Discrimination (Attachment B), which must be executed and returned with the bid.

80.3 Background Checks / Access to School Facilities

All Contractor personnel entering District facilities during regular school hours shall comply with the District's visitor management and background check requirements then in effect, including check-in at the school office and display of visible identification at all times while on District property.

80.4 Licensing

The Contractor shall hold and maintain all applicable state and local business licenses required to perform the work described herein throughout the term of the contract.

80.5 Insurance

The successful Contractor(s) shall maintain, at a minimum, Commercial General Liability insurance of not less than \$1,000,000 per occurrence / \$2,000,000 aggregate, Automobile Liability of not less than \$1,000,000 combined single limit, and Workers' Compensation coverage as required by Kentucky law, and shall name the Oldham County Board of Education as an additional insured on the Commercial General Liability policy.

80.6 Tax Exemption

The Oldham County Board of Education is exempt from Kentucky sales and use tax. A tax exemption certificate will be furnished to the successful Contractor(s) upon request.

80.7 Termination

The District may terminate any resulting contract, in whole or in part, for the District's convenience upon thirty (30) days' written notice, or immediately for the Contractor's material breach, including repeated failure to complete a scheduled change event within the required window.

80.8 Indemnification

The Contractor shall indemnify, defend, and hold harmless the Oldham County Board of Education, its Board members, officers, employees, and agents from and against any and all claims, damages, losses, and expenses arising out of or resulting from the Contractor's performance of the work, to the extent caused by the negligent acts or omissions of the Contractor, its employees, or subcontractors.

80.9 Independent Contractor

The Contractor is an independent contractor and not an employee or agent of the District. Nothing in the resulting contract shall be construed to create an employment relationship.

80.10 No Collusion

By submitting a bid, the bidder certifies that its bid is made without any prior understanding, agreement, or connection with any other person or firm submitting a bid for the same work, and is in all respects fair, without collusion or fraud.

80.11 Right to Reject

The Oldham County Board of Education reserves the right to accept or reject any or all bids.

SECTION 90 — QUESTIONS

All questions regarding this IFB must be submitted in writing, by e-mail, to the District Contact identified on the cover page, on or before the deadline stated in Section 10.4. The District will respond to all substantive questions in writing via addendum posted to the District's Bid Opportunities webpage (www.oldham.kyschools.us/district/bid-opportunities). It is the sole responsibility of each bidder to monitor that webpage for addenda prior to submitting a bid.

ATTACHMENTS

The following attachments are incorporated into and form a part of this Invitation for Bids:

- Exhibit A — Bid Schedule / Schedule of Prices (companion workbook; one tab per Bid Package, plus School List and Field-Verification notes)
- Attachment A — Bid Form (bidder identification, authorized signature, and package(s) bid — to be finalized by the District Purchasing/Facilities office)
- Attachment B — Pledge of Non-Discrimination (to be finalized by the District Purchasing office, consistent with the form used in other District solicitations)
- Attachment C — School List by Bid Package (also provided as a tab within Exhibit A)

Note to District Staff: *This draft IFB has been prepared for the District's review and finalization by the Purchasing/Facilities office and Board Attorney prior to advertisement. The assigned IFB number and the specific Board Policy citation governing competitive sealed bidding should be confirmed before this document is published or advertised. Attachments A and B should be conformed to the District's standard forms (see the format used in prior OCBE solicitations, e.g., the Copier Maintenance RFP and the Integrated Service Management Platform RFP) before release.*