SANTA ROSA INDEPENDENT SCHOOL DISTRICT
REQUEST FOR PROPOSALS (RFP)

RFP#27-PROP02 CHILLER LEASE PROJECT

Santa Rosa, Texas
Issue Date: 9/14/2026

1.0 INTRODUCTION

The Santa Rosa Independent School District ("SRISD" or "District") is soliciting sealed proposals from qualified vendors for the replacement/lease of HVAC chiller system(s) at district facilities. The purpose of this project is to improve energy efficiency, system reliability, and indoor comfort for students and staff.

2.0 PROJECT OVERVIEW

Santa Rosa ISD intends to:

- Replace aging chiller systems
- Improve HVAC efficiency and reliability
- Reduce operational and energy costs

Anticipated Locations:

- Jo Nelson Middle School
- Elma Barrera Elementary

Equipment

Barrera Elementary

- Trane Series R (Serial Number: U21G02072)
- Trane Series R (Serial Number: U21G02073)

Jo Nelson Middle School

- Trane Series (Serial Number: U21G02074)

RFP Schedule: The timeline listed below is the district's estimation of time required to complete the RFP process. All efforts shall be made to abide by this schedule; however, it is subject to

change due to different circumstances.

- Issue RFP: Monday, September 14, 2026
- Pre-bid Meeting and inspection of property held at site (102 Jesus R. Cruz, Central Office): September 18, 2026, 9:00 a.m.
- Deadline for RFP: Friday, September 25, 2026, at 12:00 p.m.
- Vendor selection date: 6:00 p.m., September 29, 2026, Santa Rosa High School.

3.0 SCOPE OF WORK

The selected vendor shall provide turnkey services including:

Equipment & Installation

- Removal and disposal of existing chillers
- Installation of new high-efficiency systems
- Associated piping, pumps, valves, and insulation

Inspection

- Contractor must attend Pre-bid meeting to visit the site before submitting their proposal and be responsible for all measurements on the project.

Electrical & Controls

- Integration with existing Building Automation System (BAS)
- New controls and electrical work as required

Engineering & Design

- Load calculations and system sizing
- Engineered plans and submittals

Commissioning

- Startup, testing, and balancing
- Staff training

Warranty

- Minimum 1-year labor warranty

- Manufacturer warranties included

Hours of Service

- Hours of Service: Contractor will have access from 8 a.m. to 5 p.m. Monday thru Friday.

Terms and Conditions

- Contractor is to install to factory specifications.

Project Schedule

- Issue Contract date: September 30, 2026
- Planned commencement of service: the date is based on when the manufacturer can produce the Chiller.
- Planned substantial completion of service: The date is based on when the manufacturer can produce the Chillers.
- Planned final completion of service: The date is based on when the manufacturer can produce the Chiller.

4.0 VENDOR QUALIFICATIONS

Vendors must:

- Be licensed in the State of Texas
- Have a minimum of 5 years of HVAC experience
- Have completed similar K–12 or public projects
- Provide at least three references

5.0 TECHNICAL SPECIFICATIONS

Systems must:

- Meet ASHRAE and Texas energy codes
- Be energy-efficient and durable
- Use environmentally responsible refrigerants
- Maintain acceptable noise levels for school environments

6.0 PROPOSAL REQUIREMENTS

Company Information

- Background and experience
- Project team

Technical Proposal

- Equipment details
- Project approach
- Timeline

Cost Proposal

- Itemized pricing (equipment, labor, materials)

References

- Minimum of three

Warranty Information

- Detailed coverage

7.0 PROJECT TIMELINE

- RFP Release: Monday, September 14th, 2026
- Site Visit: Friday, September 18th, 2026 @ 9:00 am at Barrera Elementary
- Proposal Due: Friday, September 25th, 2026 @ 12:00 p.m.
- Board Approval: Tuesday, September 30th, 2026 @ 6:00 p.m.
- Project Start: The date is based on when the manufacturer can produce the Chiller.
- Completion: The date is based on when the manufacturer can produce the Chiller.

8.0 EVALUATION CRITERIA

The contract will be awarded to the firm submitting the bests responsible Proposal complying with this RFP if the Proposal is reasonable and in the best interest of the district to accept. The firm selected will be notified at the earliest practical date. The decision regarding acceptability

of any firm's qualifications/proposal shall remain entirely with the district, at the district's sole discretion. The criteria for making this judgement will include but not limited to:

- Price
- Technical quality
- Vendor experience
- Project timeline
- References

The district reserves the right to reject any or all Proposals, to waive any informalities or technical defects in proposals, and unless otherwise specified by the district, to accept any item or groups of items in the proposal, as in the best interest of the district.

9.0 SUBMISSION INSTRUCTIONS

Proposals shall be submitted in a sealed envelope plainly marked RFP# 27-PROP02 and shall be submitted to:

Marisa Cuevas
Chief Financial Officer
P.O. Box 395
Santa Rosa, Texas 78593

Deadline: **Friday, September 25th, 2026 @ 12:00 p.m.**

Telephone, email, or fax proposals will not be accepted. Santa Rosa ISD or its agents will not be responsible for misdirected mail or packages. Any delay in mail delivery is at risk of the proposer. Late submissions will not be accepted.

10.0 TERMS & CONDITIONS

- SRISD reserves the right to reject any or all proposals
- Proposals must remain valid for 90 days
- Vendors must comply with all applicable laws

11.0 INSURANCE & BONDING

Required:

- General Liability Insurance
- Workers' Compensation
- Automobile Liability
- Performance and Payment Bonds (if required)

12.0 DISCLOSURES AND NOTIFICATIONS

- Conflicts of Interest: Proposal must state whether proposer has any professional, business, or familial relationship with any current member of the school board of the district or with any administrator of the district.

13.0 BOARD APPROVAL

Final contract award is subject to approval by the SRISD Board of Trustees.

Santa Rosa ISD
Request for Sealed Proposals
Chiller Lease Project

Proposal Acknowledgment Form

"The undersigned affirms that they are duly authorized to execute this contract, that this company, corporation, firm, partnership or individual has not prepared this proposal in collusion with any other proposer, and that the contents of this proposal as to prices, terms or conditions of said proposal have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this proposal."

Vendor_____

Address_____

Phone_____

Fax Number_____

Proposer (Signature)_____

Proposer (Print Name)_____

Position With Company_____

Signature of Company Official Authorizing This Proposal_____

Company Official (Print Name)_____

Official Position_____

Santa Rosa ISD
Request for Sealed Proposals
Chiller Lease Project

Felony Conviction Notice

Section 44.034, Texas Education Code, Notification of Criminal History, Subsection (a), states "a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony." Subsection (b) states "a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract."

This Notice Is Not Required of a Publicly Held Corporation

I, the undersigned agent for the firm named below, certify that the information concerning notification of felony convictions has been reviewed by me and the following information furnished is true to the best of my knowledge.

Vendor's Name: _____

Authorized Company Official's Name (Printed): _____

A. My firm is a publicly held corporation; therefore, this reporting requirement is not applicable.

Signature of Company Official: _____

B. My firm is not owned nor operated by anyone who has been convicted of a felony.

Signature of Company Official: _____

C. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony:

Name of Felon(s): _____

Details of Conviction(s):_____

Signature of Company Official: _____

REFERENCES:

School	Contact Person	Phone No.
_____	_____	_____
_____	_____	_____
_____	_____	_____

The undersigned affirms that they are duly authorized to execute this contract, that the company, corporation, firm, partnership or individual has not prepared this proposal in collision with any other Vendor, and that the contents of this proposal as to prices, terms and conditions of said proposal have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this proposal.

Vendor: _____

Address: _____

_____

Phone Number 1-800 _____

Fax Number: _____

Vendor (Print Name): _____

Official Authorizing this Proposal: _____

Position With Company: _____

Date: _____

This sheet needs to be included in the proposal package in order for your proposal to be Considered.

STATEMENT OF NON-COLLUSION

TOTAL ITEMS: _____

TOTAL ITEMS PROPOSED: _____

TOTAL EXTENTION: _____

My signature also certifies that the accompanying proposal is not the result of, or affected by any unlawful act of collusion with another person or company engaged in the same line of business or commerce, or any act of fraud punishable under current Texas codes. Furthermore, I understand that fraud and unlawful collusion are crimes under the Statue Law, and can result in fines, prison sentences, and civil damage awards.

COMPANY SUBMITTING PROPOSAL: _____

ADDRESS: _____

PERSON RESPONSIBLE FOR PROPOSAL: _____
(NAME: PRINT OR TYPE)

_____
(TITLE)

_____
(SIGNATURE)

SANTA ROSA ISD
PO BOX 395
SANTA ROSA, TEXAS 78593
(956)636-9800

A vendor request form needs to be processed in order to create a new vendor. A Purchase Order will not be processed if a vendor has not been created. There will be no exceptions. Please make sure the vendor has not been created by checking your vendor listing on your computer system. This will avoid duplication of vendors. Please make sure the **REMIT TO** address is included when creating a new vendor. This will prevent checks from getting lost or being sent to the wrong address. All information is to be filled out completely. Make sure you mark the contracted service either YES or NO. Make sure all information is legible especially the EIN/SS numbers.

VENDOR: _____

ADDRESS: _____

CITY: _____

STATE: _____ ZIP CODE: _____

PHONE: _____FAX: _____

CONTRACTED SERVICE: YES _____ NO _____

REQUESTED BY: _____

W-9 FORM: _____ CIQ FORM: _____

REMIT TO ADDRESS

VENDOR: _____

ADDRESS: _____

CITY: _____

STATE: _____ ZIP CODE: _____

PHONE: _____ FAX: _____

Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See ***Specific Instructions*** on page 3.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . .

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . . ☐

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)

(Applies to accounts maintained outside the United States.)

5 Address (number, street, and apt. or suite no.). See instructions.

Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

			–		–				

or

Employer identification number

		–							

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	**Signature of U.S. person**	**Date**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. *See* Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 **Name of vendor who has a business relationship with local governmental entity.**

2 ☐ **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 **Name of local government officer about whom the information is being disclosed.**

_____

Name of Officer

4 **Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.**

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes ☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes ☐ No

5 **Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.**

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

_____ _____ _____

Name of signatory Signature Date

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

(A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;

(B) a transaction conducted at a price and subject to terms available to the public; or

(C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

***

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds $2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than $100 in the 12-month period preceding the date the officer becomes aware that:

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.

LOCAL GOVERNMENT OFFICER CONFLICTS DISCLOSURE STATEMENT

FORM CIS

(Instructions for completing and filing this form are provided on the next page.)

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This is the notice to the appropriate local governmental entity that the following local government officer has become aware of facts that require the officer to file this statement in accordance with Chapter 176, Local Government Code.

OFFICE USE ONLY

Date Received

1 Name of Local Government Officer

2 Office Held

3 Name of vendor described by Sections 176.001(7) and 176.003(a), Local Government Code

4 Description of the nature and extent of each employment or other business relationship and each family relationship with vendor named in item 3.

5 List gifts accepted by the local government officer and any family member, if aggregate value of the gifts accepted from vendor named in item 3 exceeds $100 during the 12-month period described by Section 176.003(a)(2)(B).

Date Gift Accepted _____ Description of Gift _____

Date Gift Accepted _____ Description of Gift _____

Date Gift Accepted _____ Description of Gift _____

(attach additional forms as necessary)

6 SIGNATURE I swear under penalty of perjury that the above statement is true and correct. I acknowledge that the disclosure applies to each family member (as defined by Section 176.001(2), Local Government Code) of this local government officer. I also acknowledge that this statement covers the 12-month period described by Section 176.003(a)(2)(B), Local Government Code.

_____

Signature of Local Government Officer

Please complete either option below:

(1) Affidavit

NOTARY STAMP / SEAL

Sworn to and subscribed before me by _____ this the _____ day of _____, 20 _____, to certify which, witness my hand and seal of office.

_____ Signature of officer administering oath

_____ Printed name of officer administering oath

_____ Title of officer administering oath

OR

(2) Unsworn Declaration

My name is _____, and my date of birth is _____.

My address is _____, _____, _____, _____, _____.
(street) (city) (state) (zip code) (country)

Executed in _____ County, State of _____ , on the _____ day of _____, 20_____.
(month) (year)

_____

Signature of Local Government Officer (Declarant)

LOCAL GOVERNMENT OFFICER CONFLICTS DISCLOSURE STATEMENT

Section 176.003 of the Local Government Code requires certain local government officers to file this form. A "local government officer" is defined as a member of the governing body of a local governmental entity; a director, superintendent, administrator, president, or other person designated as the executive officer of a local governmental entity; or an agent of a local governmental entity who exercises discretion in the planning, recommending, selecting, or contracting of a vendor. This form is required to be filed with the records administrator of the local governmental entity not later than 5 p.m. on the seventh business day after the date on which the officer becomes aware of the facts that require the filing of this statement.

A local government officer commits an offense if the officer knowingly violates Section 176.003, Local Government Code. An offense under this section is a misdemeanor.

Refer to chapter 176 of the Local Government Code for detailed information regarding the requirement to file this form.

INSTRUCTIONS FOR COMPLETING THIS FORM

The following numbers correspond to the numbered boxes on the other side.

1. Name of Local Government Officer. Enter the name of the local government officer filing this statement.

2. Office Held. Enter the name of the office held by the local government officer filing this statement.

3. Name of vendor described by Sections 176.001(7) and 176.003(a), Local Government Code. Enter the name of the vendor described by Section 176.001(7), Local Government Code, if the vendor: a) has an employment or other business relationship with the local government officer or a family member of the officer as described by Section 176.003(a)(2)(A), Local Government Code; b) has given to the local government officer or a family member of the officer one or more gifts as described by Section 176.003(a)(2)(B), Local Government Code; or c) has a family relationship with the local government officer as defined by Section 176.001(2-a), Local Government Code.

4. Description of the nature and extent of each employment or other business relationship and each family relationship with vendor named in item 3. Describe the nature and extent of the employment or other business relationship the vendor has with the local government officer or a family member of the officer as described by Section 176.003(a)(2)(A), Local Government Code, and each family relationship the vendor has with the local government officer as defined by Section 176.001(2-a), Local Government Code.

5. List gifts accepted, if the aggregate value of the gifts accepted from vendor named in item 3 exceeds $100. List gifts accepted during the 12-month period (described by Section 176.003(a)(2)(B), Local Government Code) by the local government officer or family member of the officer from the vendor named in item 3 that in the aggregate exceed $100 in value.

6. Signature. Signature of local government officer. Complete this section after you finish the rest of this report. You have the option to either: (1) take the completed form to a notary public where you will sign above the first line that says “Signature of Local Government Officer” (an electronic signature is not acceptable) and your signature will be notarized, or (2) sign above both lines that say “Signature of Local Government Officer (Declarant)” (an electronic signature is not acceptable), and fill out the unsworn declaration section.

Local Government Code § 176.001(2-a): “Family relationship” means a relationship between a person and another person within the third degree by consanguinity or the second degree by affinity, as those terms are defined by Subchapter B, Chapter 573, Government Code.

Local Government Code § 176.003(a)(2)(A):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

***

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds $2,500 during the 12-month period preceding the date that the officer becomes aware that:

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor.