

CAMINO NUEVO CHARTER ACADEMY

REQUEST FOR PROPOSAL (RFP)

HVAC Service Plan (HVAC Preventive Maintenance)

RESPONSE DEADLINE FOR PROPOSALS: Monday, June 4, 2018 @ 4:00 p.m.

Deliver Response to:

Camino Nuevo Charter Academy
Attn: Jesus Rivas
3435 W. Temple Street, Los Angeles, CA 90026

Camino Nuevo Charter Academy (“Camino Nuevo” or “CNCA”) is a charter management organization with seven (7) charter school campuses, with two (2) LAUSD sites located in Los Angeles, California. Camino Nuevo is requesting a HVAC service (preventative maintenance) plan at the following sites.

School/Office/Other	Street	City, State, Zip
Home Support Office	3435 W. Temple St.	Los Angeles, CA 90026
Burlington Campus K-3	697 S. Burlington Ave	Los Angeles, CA 90057
Burlington Campus 4-8	653 S. Burlington Ave	Los Angeles, CA 90057
Early Childhood Campus	661 S. Burlington Ave	Los Angeles, CA 90057
Kayne Siart K-8	3400 W. 3rd St	Los Angeles, CA 90020
Eisner Middle School	2755 West 15th St.	Los Angeles, CA 90007
Dalzell Lance High School Campus	3500 W. Temple St.	Los Angeles, CA 90004
Jose A. Castellanos Elementary (LAUSD)	1723 W. Cordova St.	Los Angeles, CA 90007
Sandra Cisneros K-8 (LAUSD)	1018 Mohawk St.	Los Angeles, CA 90026

I. RFP PROCESS

CNCA intends to select a qualified provider for the development and implementation of a HVAC service program. The awarded respondent shall identify equipment preventative maintenance costs, planned preventative maintenance plan, improve systems reliability, maximize energy efficiencies, reduce overall operating expenses and extend equipment life cycle for each of the sites listed above.

At CNCA’s sole discretion, the awarded respondent shall be chartered to manage the associated service plan, schedule preventative maintenance and perform service work as outlined in the plan.

Contracting shall be pursuant with the California Government Code 4217.10–4217.18, which establishes a process whereby public schools and other public agencies may enter into a service program of this nature.

All questions regarding the RFP or the process shall be submitted in writing by email only, to the attention of, Jesus Rivas, jesus.rivas@caminonuevo.org.

II. MANDATORY PRE-BID MEETING

Firms must attend a mandatory pre-bid meeting and required site walks. The district will conduct more than one (1) MANDATORY PRE-BID JOB WALK(S) for the work. The initial pre-bid job walk is to begin at the location, date and time stated below. Failure to attend will render the bid proposal of such bidder to be non-responsive.

Mandatory Pre-Bid Meeting & HVAC Site Walks

9:00AM, Friday, May 11 2018

Main Conference Room

Camino Nuevo Charter Academy

3435 W. Temple Street, Los Angeles

Mandatory Site Visits

May 11-18, 2018

Listed sites by appointment

Camino Nuevo Charter Academy

III. MAINTENANCE & SERVICE GOALS

Camino Nuevo's ultimate goal is to provide a designed HVAC service plan with preventative maintenance measures at each listed site. The service plan should improve HVAC equipment operation with reliability as a goal in addition to reducing run to fail maintenance costs. Respondents shall support CNCA's goal by offering a service program for each site listed that accomplish the following:

- Service and maintain identified HVAC units (in list provided during mandatory meeting)
- Reduce energy, operating and maintenance costs
- Enhances the reliability and life expectancy of HVAC equipment
- Achieves a strong financial benefit for cost savings
- Maintains consistent and reasonable levels of occupant comfort
- Maintains building functionality and compatibility with existing equipment
- Improves utilization of technology to achieve optimum performance and savings
- Provides additional benefits that directly result from the service program, improved indoor air quality, and reduced down time of HVAC equipment
- Provides training to employees on maintenance and repair of HVAC equipment and Distech controls
- Maintains vendor neutrality on consumable parts so as to provide best value to CNCA

IV. MINIMUM REQUIREMENTS

Respondents shall meet the following minimum requirements to participate in CNCA's RFP process:

- Has no pending or recent litigation in the past (60) months.
- Has a physical service location or branch office within a 50 mile radius of Los Angeles, California with a minimum of 10 personnel in such office. PO Boxes and home offices do not qualify.
- Proposed Service Team must have capability to comply with CFC, HCFC and ASHRAE
- Proposed Service Team must have experience implementing a minimum of five (5) service programs for organizations with more than 300,000 sf.
- Proposed service plan must be managed by service manager with journeyman level certification.
- Proposed Service Team must disclose assigned technician levels of experience.
- Proof of Liability Insurance: Certificate of Liability Insurance with limits not less than \$1,000,000 per occurrence and \$2,000,000 aggregate for bodily injury and property damage liability
- Proof of Automobile Insurance: Certificate of Automobile Liability with limits not less than \$1,000,000 combined single limit per accident
- Prevailing Wage Does Not Apply

V. GENERAL DESCRIPTION OF SCOPE OF WORK

The Service Plan Contractor shall provide all of the necessary coordination, material procurement, management, labor, materials, tools, equipment, supplies, services and disposal to execute the defined scope of work in the Contractors proposal. Equipment list will be provided by CNCA as Attachment B.

The scope of work will include:

HVAC Service Program Features

- For the two LAUSD sites, qualify as a contractor based on LAUSD requirements
- Provide a detailed list of covered HVAC equipment per site
- Provide complete system coverage
- Provide a schedule for maintenance and service
- Preventative maintenance recommendations or action plan
- Make service appointments with each site
- Check in at each site when performing work
- Schedule indicates frequency of service
- Report any issues to CNCA, submit work order (documentation) per visit and per site
- Energy Star Benchmarking for each building (nine in total) every year.
- Provide priority Service (1 hour emergency response time and 4 hour minimum response time for non-emergencies)
- 24/7 dispatch center
- Preferred Customer Discount with set rates

- Compliance with CFC and HCFC, provide plan of removal or disposal of refrigerant and oils
- List a frequency of service required for each of the listed equipment
- Identify and create list of filters including size per site. Identify and maintain a minimum stock of replacement filters per site in the event of an emergency
- Train CNCA Lead Custodians on basic services provided per HVAC equipment type. Two sessions (8 hours minimum each class).
- Provide Distech Controls training for CNCA Lead Custodians
- Include 10 year compressor warranty (labor and materials for units one year old or newer)
- Quarterly inspection and service reports to CNCA (after service is provided). Contractor to provide electronic backup of all service calls, repairs, proposals, and maintenance reports.
- Priority Service – Contractor to provide immediate service over all non-maintenance customers. Any service request generated by CNCA will be placed on high priority and responded to accordingly per CNCA's direction.
- Contractor to provide copy of MSCA's GreenSTAR certification

List of Covered Maintenance Tasking

PACKAGED AIR CONDITIONING SYSTEMS – GAS/ELECTRIC

1. Lubricate fan bearings per manufacturer's recommendation.
2. Lubricate motor bearings per manufacturer's recommendation.
3. Check belts and sheaves. Replace and adjust when authorized.
4. Check coils for visible signs of leaks.
5. Lubricate and adjust dampers and linkages. If applicable.
6. Check and clean drain pan and clear condensate drain lines.
7. Check motor operating conditions.
8. Inspect electrical connections, contactors and relays.
9. Inspect all temperature, safety, and operational controls.
10. Start compressor. Check operating conditions and report any abnormalities.
11. Secure unit panels, and inspect roof curb flashing.
12. Check for gas leaks.
13. Inspect pilot and clean pilot orifice. If applicable.
14. Inspect and clean flame sensor.
15. Inspect Hot Surface Igniter. If applicable.
16. Verify operation of all safety limit and operating controls.
17. Inspect flame condition.
18. Clean condenser coils annually.
19. Inspect filters and change per filter schedule.
20. Replace belts as needed.

PACKAGED AIR CONDITIONING SYSTEMS – HEAT PUMPS

1. Lubricate fan bearings per manufacturer's recommendation.
2. Lubricate motor bearings per manufacturer's recommendation.
3. Check belts and sheaves. Replace and adjust when authorized.
4. Check coils for visible signs of leaks.
5. Lubricate and adjust dampers and linkages. If applicable.
6. Check and clean drain pan and clear condensate drain lines.
7. Check motor operating conditions.

8. Inspect electrical connections, contactors and relays.
9. Inspect all temperature, safety, and operational controls.
10. Start compressor. Check operating conditions in heating and cooling mode.
11. Secure unit panels, and inspect roof curb flashing.
12. Clean condenser coils annually.
13. Inspect filters and change per filter schedule.
14. Replace belts as needed.

EXHAUST FANS

1. Inspect belts and adjust as required.
2. Lubricate motor and bearings as required.
3. Inspect electrical.
4. Replace belts as needed.

SPLIT SYSTEM – AIR COOLED CONDENSING UNITS

1. Review manufacturer's recommendation for start-up.
2. Energize crankcase heater per manufacturer's recommendation for warm-up.
3. Visually inspect for leaks.
4. Inspect electrical connections, contactors, relays, and operating/safety controls.
5. Check vibration eliminators.
6. Check compressor oil level. If applicable.
7. Check and test all operating and safety controls.
8. Check operating conditions. Report any abnormalities.
9. Clean Condenser coils annually.

SPLIT SYSTEM - FAN COIL UNITS

1. Inspect motor. Clean and lubricate dependant on accessibility.
2. Lubricate fan bearings.
3. Inspect coil(s) for leaks dependent on accessibility.
4. Inspect drain pan or pipe and clean as required.
5. Inspect belt and adjust tension. If applicable.
6. Inspect electrical connections, contactors, relays, and operating/safety controls.
7. Inspect filters and change per filter schedule.

AIR COOLED INDOOR (DX) COMPUTER ROOM A/C (CRAC) UNIT

1. Lubricate fan bearings per manufacturer's recommendation.
2. Lubricate motor bearings per manufacturer's recommendation.
3. Check belts and sheaves.
4. Check coils for visible signs of leaks.
5. Check and clean drain pan and clear condensate drain lines.
6. Check motor operating conditions.
7. Inspect electrical connections, contactors, relays, and operating/safety controls.
8. Check compressor oil level. Check crankcase heater operation.
9. Start compressor. Check operating conditions and report any abnormalities.
10. Secure unit panels.
11. Inspect all temperature, safety, and operational controls.
12. Inspect humidifier operation (if applicable)
13. Inspect filters and change per filter schedule.
14. Replace belts as needed.

VI. ADDITIONAL REPAIR AND REPLACEMENT SERVICES

Camino Nuevo is also requesting respondents to set rates for additional repair and/or replacement of related HVAC components and/or units. The set rates will be in place during the duration of the service plan. These services are for recommended repairs and/or replacement. Any recommended repair or replacement must be approved in advance by CNCA Director of Facilities and work must be performed upon issue of a CNCA Purchase Order (PO). Rates must be listed in Attachment A, hourly rates, truck or equipment charges, materials warranty and materials mark up (as a %). Preference will be given to respondents who set a preferred customer rate.

Additional repairs and replacement services are for failures that occur that are not part of the service plan. These repairs and replacements will also cover building automation, thermostats and other low voltage control systems. Rates for automation techs will be listed in Attachment A.

Emergency response time is also required in Attachment A and can be an estimated time of arrival for a technician.

VII. SCHEDULE OF EVENTS

EVENT	Date
CNCA issues RFP to Bidders	May 4, 2018
Mandatory Pre-Bid Meeting	May 11, 2018
HVAC Site Walks to be performed by Bidders	May 11-18, 2018
Deadline for Written Questions	May 22, 2018
RFI Responses Returned	May 25, 2018
Proposals are Due	June 4, 2018
CNCA Selects and Notifies Successful Respondent	June 13, 2018

VIII. PROPOSAL INSTRUCTIONS

Ink or Typewritten

All information, prices, notations, signatures, and corrections must be in ink or typewritten. Mistakes may be crossed out and corrections typed or printed adjacent to the mistake and initialed in ink by the person signing the Proposal.

Signature Verification

To be considered for award, each Proposal must be signed by a legally authorized representative of the Company.

Formation of Contract

Winning proposal does not enforce a contract with CNCA until Proposal is approved by CNCA Board.

A signed HVAC Service Program Proposal including the Project specifications, deliverables cost, projected energy savings and incentive administration, as well as district required forms and a signed Purchase Order from CNCA shall constitute the contract documents.

Informed Respondent

It will be your responsibility to be fully informed as to the conditions, requirements, and specifications before submitting Proposals. Failure to do so will be at the Company's own risk.

Confidentiality

Pursuant to *Michaelis, Montanari, & Johnson v. Superior Court* (2006) 38 Cal.4th 1065, Proposals submitted in response to this RFP shall be held confidential by CNCA and shall not be subject to disclosure under the California Public Records Act until after either CNCA and the successful Company have completed negotiations and entered into a contract or CNCA has rejected all Proposals. CNCA will have no liability to the Company or any other party as a result of any public disclosure of any Proposal or the contract.

IX. SUBMITTAL REQUIREMENTS

Two (2) originals (hard copies) of the Proposal shall be submitted in a three (3) ring loose-leaf binder or report cover. It is critical that the Proposal follows the format outlined below. CNCA also requests an electronic PDF copy for review purposes. Proposals should be limited to fifty (50) pages (not including table of contents or cover letter) and include the following:

Section Tabs

Proposals should be divided by tab sections according to items in the table of contents. This will assist CNCA's evaluating team in identifying items and information submitted with the Proposal.

Table of Contents

The table of contents of the Proposal should include a clear and complete identification of the materials submitted by tab section and page number.

X. DOCUMENT FORMAT

1. Cover Letter

A signed letter of interest (no more than two (2) pages), stating the respondent's interest and qualifications in providing the services as outlined in the RFP. Please describe how the respondent meets the minimum requirements as described in Section III of the RFP. Provide your company's valid classifications and requirements. Cover Letter must be signed by an authorized representative of the respondent's company.

2. Organizational Background, Financial Capacity & Management Structure

Provide general information on the respondent including: a brief history of the firm, length of time performing services, number of years in business, location of main office, telephone number, contact name, local resources, etc. Describe the respondent's service capabilities and customer service department including hours of operation and emergency dispatch procedures. Provide a statement of the respondent's financial capacity and capability to perform to the terms of this solicitation request. Include a statement of bond rating, bond limits and provide evidence of insurability. Please provide a statement of how many employees respondent has in the State of California and how many employees it has in Los Angeles County. Respondent shall provide three years audited financials if company is private. Respondent shall provide a copy of most recent annual financial report submitted to the SEC if publically traded.

3. Service Team Members

List the members of the service team. Provide a list of the personnel most likely to be used on for the service and their qualifications. Please provide resume for each team member, key partners and subcontractors. Also provided detailed experience and level of certifications. Describe the management structure of the responding firm and include an organizational chart

4. Service Work Experience & References

Provide detailed service history for two public sector or educational clients the respondent has contracted with for similar Service Plans. Describe the scope of work of the service indicating start/completion date, services and systems provided. Provide the owner's name, address, telephone number, and contact person for each reference and type of products/services provided. Respondent shall also provide the percentage of engineering, procurement and construction services performed "In-House" versus subcontracted.

5. Legal and Litigation History

Please describe any litigation, mediation, arbitration, or termination of contract within the last five years with respect to Design Build Construction. Describe each event in detail and indicate the final results.

No assignment by the company of any contract to be entered into hereunder or any part thereof, or of funds to be received thereunder by the company, will be recognized by CNCA unless such assignment has had the prior approval of CNCA and the surety has been given due notice of such assignment in writing and has consented thereto in writing. Please indicate in your response your company's understanding and acceptance of this criteria.

XI. RFP EVALUATION CRITERIA

A CNCA committee will evaluate qualifications based on the scoring criteria outlined in this section. Respondents who do not meet the minimum requirements as stated above will not be considered. Respondents who are not actively engaged in providing services of the nature proposed in their response to the RFP and/or who cannot clearly demonstrate to the satisfaction of CNCA committee their ability to satisfactorily perform the work in accordance with the RFP requirements will not be considered.

"BEST VALUE" EVALUATION CRITERIA	
Proposal Completeness	15%
Firm Information (Service Team, Safety Program, Financials)	15%
Maintenance Experience and References	15%
Proposed Detailed Service Program Plan and Scope (Attachment B – Equipment List)	25%
Price Schedule for Additional Work (Attachment A)	10%
MSCA GreenSTAR Certification	5%
Price	15%