

# Bid invitation

## Table of Contents

- Table of Contents ..... 1
- 1. Introduction ..... 2
  - 1.1 Purpose of the Bid Invitation ..... 2
  - 1.2 Company Overview ..... 2
- 2. Service Expectations ..... 3
  - 2.1 Air Conditioning Maintenance Requirements ..... 3
  - 2.2 Quality Standards ..... 4
- 3. Submission Requirements ..... 6
  - 3.1 Proposal Format ..... 6
  - 3.2 Deadline and Contact Information ..... 7
- 4. Evaluation Criteria ..... 8
  - 4.1 Technical Competence ..... 8
  - 4.2 Experience and References ..... 10
  - 4.3 Pricing Structure ..... 11
- 5. Legal Disclaimer ..... 12
  - 5.1 Terms and Conditions ..... 12
  - 5.2 Confidentiality Requirements ..... 13

# 1. Introduction

## 1.1 Purpose of the Bid Invitation

This bid invitation aims to engage **qualified air conditioning vendors** capable of delivering **cost-effective and energy-efficient** solutions for the **main corporate office**. The selected provider will be responsible for **installation and system upgrades**, ensuring that outdated equipment is replaced with modern, high-performance HVAC systems that enhance operational efficiency.

To facilitate a **competitive bidding process**, this document establishes the framework for **proposal submission, evaluation criteria, and service expectations**. Vendors are expected to demonstrate **technical expertise, experience, and a commitment to quality** in alignment with the company's operational objectives.

Through this initiative, the company seeks to secure an **experienced partner** that can implement sustainable HVAC solutions while maintaining reliability and cost-effectiveness. This process underscores the company's commitment to **strategic facility management and long-term operational efficiency**.

## 1.2 Company Overview

Andrew J. Brown Academy is a **240,000 square foot, three-floor facility** located in Indianapolis, Indiana, dedicated to providing exceptional educational environments for student instruction and academic excellence. Our establishment serves as a cornerstone for learning in the region, accommodating thousands of students annually in a space designed to meet contemporary educational standards.

Our **core mission** centers on creating a **comfortable and energy-efficient environment** that enhances student learning experiences and optimizes faculty productivity. We prioritize infrastructure that supports this mission while maintaining cost-effectiveness and sustainability in our operations.

### Facility highlights:

- State-of-the-art classrooms and instructional spaces
- Modern technology infrastructure supporting educational activities
- Multiple specialized learning environments across three floors
- Commitment to sustainable building practices and energy conservation

As an educational institution, we recognize that optimal environmental conditions directly impact cognitive function, concentration, and overall educational outcomes. Our approach to

facility management reflects our dedication to creating spaces where both students and educators can achieve their highest potential.

The current HVAC modernization initiative represents a strategic investment in our facility's infrastructure, aligned with our long-term commitment to operational excellence and environmental responsibility. We seek a qualified air conditioning vendor who understands the unique requirements of educational environments and can partner with us to advance our mission of providing exceptional learning spaces.

## 2. Service Expectations

### 2.1 Air Conditioning Maintenance Requirements

This bid invitation focuses primarily on the **installation of new air conditioning systems** rather than ongoing maintenance services. The selected vendor will be responsible for the **replacement of existing rooftop HVAC units** with modern, energy-efficient models that meet the specific requirements of our 240,000 square foot educational facility.

While this project centers on installation rather than scheduled maintenance, vendors must demonstrate their capability to:

- Conduct thorough pre-installation assessment of current systems
- Properly decommission and dispose of existing rooftop units in accordance with environmental regulations
- Install new HVAC systems with minimal disruption to educational activities
- Provide comprehensive documentation of installed equipment
- Conduct post-installation testing and system optimization

### Regulatory Compliance

The selected vendor must maintain full **regulatory compliance** throughout the project, including:

- Proper management of refrigerants during removal and installation
- Adherence to all applicable building codes and safety standards
- Documentation of compliance with local and federal HVAC installation requirements
- Implementation of industry best practices for educational facilities
- Certification of installed systems according to relevant standards

### System Specifications

The new air conditioning systems must be:

Requirement	Details
Energy Efficiency	High-efficiency models that reduce operational costs
Capacity	Appropriate for a 240,000 square foot, three-floor educational facility
Controls	Modern control systems compatible with facility management protocols
Reliability	Proven reliability in similar institutional settings
Sustainability	Environmentally responsible components and operation

Vendors should outline their approach to ensuring these requirements are met, including their methodology for system sizing, equipment selection, and installation procedures appropriate for an educational environment.

### 2.2 Quality Standards

The installation and implementation of air conditioning systems for the Andrew J. Brown Academy shall adhere to **rigorous quality standards** to ensure optimal performance, reliability, and longevity. All vendors must demonstrate their commitment to meeting these standards throughout the project lifecycle.

#### Equipment and Materials

All installed equipment must come with a **manufacturer's warranty of at least 10 years** and a **vendor service guarantee of 5 years**. This warranty requirement significantly exceeds industry averages for commercial equipment, reflecting our commitment to long-term investment in quality infrastructure. The extended warranty period ensures protection against defects and premature system failures.

Equipment and components used in the installation must meet or exceed the following criteria:

- Compliance with ASHRAE standards for educational facilities
- Energy Star certification where applicable
- UL listing for all electrical components
- ARI certification for performance ratings
- Conformity to EPA regulations for refrigerants

#### Installation Standards

The selected vendor must adhere to the following installation quality standards:

Standard Area	Requirements
Workmanship	Installation must comply with manufacturer specifications and industry best practices
System Integration	Seamless integration with existing building management systems
Testing & Balancing	NEBB or AABC certified testing, adjusting, and balancing
Documentation	Comprehensive as-built documentation and operation manuals
Safety	Full compliance with OSHA regulations throughout installation

**Training and Knowledge Transfer**

The vendor is responsible for **training the facility management team** on system controls and operation. This training must be comprehensive and should include:

- Hands-on operational instruction for daily system management
- Troubleshooting procedures for common issues
- Documentation of system parameters and optimal settings
- Digital and physical copies of all operational manuals
- Follow-up consultation availability after installation completion

**Project Management Quality**

Vendors must demonstrate commitment to project management excellence through:

- Clear communication channels with designated project contacts
- Regular progress updates throughout the installation process
- Proactive identification and resolution of potential issues
- Minimal disruption to educational activities during installation
- Adherence to agreed-upon project timelines and milestones

**Environmental and Indoor Air Quality Standards**

The installed systems must support optimal indoor air quality for educational environments, including:

- Appropriate ventilation rates per ASHRAE 62.1 standards
- Effective humidity control between 40-60% relative humidity
- Filtration meeting MERV 13 or higher ratings
- Noise levels not exceeding NC 35 in instructional spaces

- Energy recovery capabilities to maintain efficiency while ensuring air quality

All vendors must clearly demonstrate in their proposals how their solution will meet or exceed these quality standards, with specific reference to their quality assurance processes, certification programs, and verification methodologies.

### 3. Submission Requirements

#### 3.1 Proposal Format

Proposals must be professionally prepared, clear, and concise. While there is no strict page limit, submissions should include all necessary details in a **structured and organized format** to facilitate evaluation.

Each proposal must contain the following components:

- **Company Information**
  - Business name and contact details
  - Licensing and certifications
  - Primary point of contact for the project
- **Project Approach**
  - Description of proposed air conditioning systems and installation methods
  - Compliance strategy with regulatory requirements
  - Plan for minimizing operational disruptions during installation
- **Past Performance and References**
  - List of similar completed projects, preferably in educational or institutional settings
  - References from previous clients, including contact information
  - Vendor certifications and industry credentials
- **Pricing and Payment Terms**
  - Detailed cost breakdown for equipment, installation, and associated services
  - Payment milestones and proposed schedule
- **Completion Timeline**
  - Estimated project duration with key milestones
  - Consideration of scheduling constraints related to facility operations

#### Submission Guidelines

Proposals must be submitted **electronically via email in PDF format**. Vendors must ensure submitted files are **fully legible and appropriately formatted** to maintain clarity and professionalism.

Incomplete or late submissions may be disqualified from consideration.

### 3.2 Deadline and Contact Information

All proposals for this bid invitation must be submitted by **April 25, 2025, at 4:00 PM Eastern Standard Time (EST)**. Submissions received after the stated deadline will not be considered for evaluation.

#### Submission Method and Requirements:

- All proposals must be submitted electronically in PDF format
- Send submissions to: [tgustin@paramountindy.org](mailto:tgustin@paramountindy.org)
- No physical submissions or alternative delivery methods will be accepted

#### Primary Contact:

Contact Information	Details
Contact Person	Tara Gustin
Position	Chief Operations Officer
Email Address	<a href="mailto:tgustin@paramountindy.org">tgustin@paramountindy.org</a>
Telephone	No phone inquiries accepted

#### Questions and Clarifications:

Vendors may submit questions regarding this bid invitation until **April 5, 2025**. All inquiries must be directed via email to the primary contact address listed above. Please note that:

- All communications must be conducted through email only
- Phone inquiries will not be accepted or addressed
- Questions submitted after April 5, 2025 may not receive responses

#### Additional Submission Notes:

- The subject line of submission emails should clearly indicate "Air Conditioning Proposal"
- No automatic acknowledgment will be provided upon submission
- Vendors requiring confirmation of receipt may include such a request in their submission email
- Vendors are responsible for ensuring timely delivery and proper formatting of all submitted materials

Paramount Schools of Excellence, the Educational Service Provider for Andrew J. Brown Academy reserves the right to modify the schedule or terms of this bid invitation as necessary. Any amendments will be communicated to all prospective bidders who have registered their interest by submitting questions prior to the question deadline.

## 4. Evaluation Criteria

### 4.1 Technical Competence

The evaluation of technical competence will focus on the vendor's demonstrated ability to successfully implement HVAC systems in educational environments. Assessment will prioritize vendors with **proven expertise in large-scale installations** and a comprehensive understanding of the unique requirements of academic facilities.

#### Minimum Experience Requirements

Vendors must have completed at least **3 major HVAC installation projects** for educational institutions in the past **7 years**. This requirement ensures that selected contractors possess relevant experience with environments similar to our facility. Proposals should include detailed case studies of these projects, highlighting:

- Total square footage serviced
- System capacity and specifications
- Solutions for addressing educational environment challenges
- Post-installation performance metrics

#### Certification Requirements

All vendors must hold current **ARI (Air-Conditioning, Heating, and Refrigeration Institute) certification** demonstrating adherence to industry performance standards. This certification verifies that vendors maintain compliance with established criteria for:

Certification Element	Requirement
Performance Testing	Documentation of standard laboratory testing procedures
Standards Compliance	Adherence to ARI standards for commercial equipment
Documentation	Ability to provide accurate performance ratings
Safety Provisions	Compliance with all applicable safety regulations

#### Technical Capabilities Assessment

Proposals will be evaluated based on demonstrated expertise in:

- **Load calculation expertise** using industry-standard methodologies appropriate for commercial educational facilities
- **System zoning capabilities** that accommodate varying occupancy patterns typical in educational settings
- Technical solutions that balance energy efficiency with optimal learning environment conditions
- Innovative approaches to minimizing operational disruption during installation
- Integration capabilities with existing building management systems

### **Energy Efficiency Expertise**

Vendors must demonstrate their approach to maximizing energy efficiency while maintaining optimal environmental conditions. Proposals should outline:

- Methodologies for system selection based on efficiency ratings
- Strategies for reducing operational costs through equipment selection
- Experience implementing energy management controls in similar facilities
- Projected energy consumption metrics for proposed systems

### **Project Management Capabilities**

The evaluation will prioritize vendors with **project managers** and a demonstrated track record of **on-time project delivery**. Proposals should provide evidence of:

- Project management certification and qualifications of key personnel
- Documentation of successful adherence to project timelines in previous installations
- Risk management and contingency planning processes
- Communication protocols for project status updates and issue resolution

### **Technical Documentation Capabilities**

Vendors must demonstrate their ability to provide comprehensive technical documentation including:

- Equipment specifications and operational parameters
- Maintenance requirements and schedules

Vendors who exceed the minimum requirements in these areas will receive favorable consideration in the evaluation process. The assessment will focus on identifying providers whose technical competence directly translates to successful project implementation and long-term system performance in our educational environment.

## 4.2 Experience and References

The evaluation of vendor experience and references will focus on identifying contractors with **proven track records in educational facility HVAC installations**. This assessment aims to ensure the selected vendor possesses the necessary expertise to successfully implement air conditioning solutions that address the unique requirements of academic environments.

### Experience Requirements

Vendors must demonstrate a **minimum of 5+ years of experience** in commercial HVAC installation, with particular emphasis on educational facilities. Specifically, proposals must document:

- Completion of **at least 3 projects in educational facilities within the past 7 years**
- Evidence of successfully managing projects of comparable scale (200,000+ square feet)
- Experience with the specific HVAC system types proposed for this installation

### Priority Experience Consideration

Special consideration will be given to vendors who can demonstrate:

Experience Type	Evaluation Weight
Prior work at Andrew J. Brown Academy	Highest priority
Experience with Paramount Schools of Excellence buildings	High priority
Other K-12 educational facilities	Medium priority
Large commercial installations	Standard consideration

This tiered approach recognizes the value of familiarity with our specific facilities and organizational requirements while ensuring all qualified vendors receive appropriate consideration.

### Reference Requirements

Each proposal must include a **minimum of five references** from previous clients, with at least three from educational institutions. References should be current (within the past 5 years) and include:

- Project scope and value
- Project timeline and completion date
- Contact information for facility managers or administrators

- Description of challenges encountered and solutions implemented
- Post-installation performance metrics where available

### **Performance Verification**

The evaluation committee reserves the right to:

- Contact all provided references directly
- Request additional references if deemed necessary
- Conduct site visits to completed installations
- Review documentation of system performance over time

### **Vendor Reputation Assessment**

Proposals will undergo a comprehensive assessment of vendor reputation including:

- Review of safety records and regulatory compliance history
- Analysis of litigation history related to contract performance
- Evaluation of financial stability and business longevity
- Assessment of warranty fulfillment and post-installation support history

### **Educational Sector Expertise**

Vendors should demonstrate understanding of educational facility requirements through:

- Evidence of familiarity with academic scheduling constraints
- Experience accommodating varied occupancy patterns typical in educational settings
- Understanding of noise control requirements for learning environments
- Knowledge of indoor air quality standards for educational facilities

The evaluation will employ a **weighted scoring system** that prioritizes vendors with experience in similar educational facility projects, with particular preference for those with direct experience at Andrew J. Brown Academy or Paramount Schools of Excellence buildings. This approach ensures selection of a vendor with demonstrated capability to meet the specific needs of our educational environment.

## **4.3 Pricing Structure**

Vendors must submit a **lump sum bid** covering all costs associated with the procurement, installation, and commissioning of the air conditioning systems. While a single total price is required, vendors may optionally include a **breakdown of major cost components**, such as equipment, labor, permits, and contingency allowances, to enhance transparency.

The **maximum budget for this project is \$2,650,000**, and all proposals must remain within this financial boundary. Proposals exceeding this amount will not be considered.

### **Payment Structure and Terms**

Payments will be made on a **monthly progress basis**, contingent upon verification of work completion. Each payment application must include:

- Detailed invoicing specifying the work completed
- Supporting documentation, such as inspection reports or progress photos
- Compliance with all contractual milestones

Invoices will be processed within **15 days of approval**, provided that all documentation is complete and satisfactory.

### **Final Payment and Retainage**

A portion of the total contract value may be subject to **retainage**, withheld until final project acceptance to ensure contract compliance and system performance. The exact retainage percentage, if applicable, will be determined during contract negotiations. The **final payment** will be released upon successful completion of post-installation testing and facility acceptance.

All proposed pricing structures must support financial transparency, ensure alignment with the project scope, and adhere to the outlined payment terms. Vendors must explicitly state any additional financial conditions in their proposals.

## **5. Legal Disclaimer**

### **5.1 Terms and Conditions**

#### **Proposal Validity and Acceptance**

All submitted proposals must remain valid for a period of **90 days** from the submission deadline. The company reserves the right to accept or reject any or all proposals, waive technicalities, and accept parts of multiple bids if deemed in the best interest of the project. Notification of bid acceptance or rejection will be provided to all participating vendors.

#### **Contract Termination**

The company reserves the right to terminate the contract **for cause** if the vendor fails to meet agreed-upon **performance standards, regulatory requirements, or project deadlines**. In such cases, the vendor shall be compensated only for work completed up to the termination date. No additional financial penalties will be imposed beyond payment for satisfactorily rendered services.

#### **Liability and Insurance**

The selected vendor must maintain **general liability insurance of at least \$2 million** throughout

the contract duration. Proof of insurance must be provided prior to contract execution. The vendor assumes full responsibility for any damages, injuries, or losses resulting from their performance under the contract.

### **Regulatory Compliance**

All work performed must comply with **local, state, and federal regulations**, including applicable **building codes, safety standards, and environmental requirements**. Vendors are responsible for obtaining all necessary permits and ensuring proper handling and disposal of materials in accordance with applicable laws.

### **Dispute Resolution**

Any disputes arising under this contract shall be resolved through **binding arbitration in Indiana**. The arbitration process will follow a mutually agreed-upon set of procedures, with the decision being final and enforceable. Legal costs associated with arbitration shall be borne by the respective parties unless otherwise determined by the arbitrator.

### **Confidentiality**

All information exchanged in relation to this bid invitation and subsequent contract shall be considered **confidential** and must not be disclosed to third parties without prior written consent. Vendors shall take appropriate measures to protect proprietary information shared during the bidding and execution phases.

### **Modifications or Amendments**

The company reserves the right to modify or amend any part of this bid invitation before the submission deadline. Any such changes will be communicated in writing to all prospective vendors who have submitted inquiries or expressed intent to bid.

## **5.2 Confidentiality Requirements**

All vendors participating in this bid process are required to maintain **strict confidentiality** regarding all information disclosed by the Andrew J. Brown Academy. This requirement covers both the bidding process and any subsequent project execution phases.

### **Information Protection Protocols**

Vendors must implement appropriate information security measures to protect all data shared during this process, including:

- Technical specifications and facility details
- Proprietary institutional information
- Financial data and budget parameters
- Building plans and infrastructure documentation
- Staff and organizational information

### Permitted Information Use

Confidential information may be used **solely for the purpose of preparing and implementing** the air conditioning installation project. Vendors are prohibited from using this information for any other commercial purposes or sharing it with third parties without express written consent.

Information Type	Handling Requirement
Technical Documents	Access limited to authorized personnel only
Digital Files	Must be password-protected and encrypted
Physical Documents	Must be stored in secure locations
Communication	Must occur through approved channels only
Facility Access Information	Must not be shared with unauthorized personnel

### Non-Disclosure Requirements

Selected vendors will be required to sign a formal **Non-Disclosure Agreement (NDA)** prior to receiving complete project documentation. This agreement will:

- Establish legal obligations for information protection
- Define penalties for confidentiality breaches
- Outline specific types of protected information
- Establish duration of confidentiality obligations
- Detail procedures for secure information handling

### Vendor Personnel Requirements

Vendors must ensure that all personnel involved in the project:

- Are informed of confidentiality obligations
- Have signed appropriate confidentiality agreements
- Receive training on proper handling of confidential information
- Understand the consequences of confidentiality breaches

### Information Disposal

Upon project completion or in the event a vendor is not selected, all confidential information must be:

- Returned to the Andrew J. Brown Academy in its original form, or
- Permanently destroyed using secure methods (including digital deletion and physical document shredding)
- Certified as properly disposed with written confirmation

### **Communication Protocols**

All project-related communications must occur through **secure, approved channels** as designated by the Andrew J. Brown Academy. Vendors must not discuss project details in public forums, on social media, or in any circumstances where unauthorized individuals might access sensitive information.

The Andrew J. Brown Academy reserves the right to audit vendor compliance with these confidentiality requirements at any time during the bidding process or project execution. Failure to maintain proper confidentiality may result in immediate disqualification from the bidding process or termination of any resulting contract.