

# Request for Proposals – February 3, 2025

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**Service: HVAC Technical Support, Maintenance, and Mechanical System Services**

Big Walnut High School  
713 North Miller Drive  
Sunbury, Ohio 43074

Prairie Run Elementary School  
701 North Miller Drive  
Sunbury, Ohio 43074

Central Energy Plant  
709 N. Miller Drive  
Sunbury, Ohio 43074

**Owner: Big Walnut Local School District Board of Education**  
110 Tippet Court  
Sunbury, Ohio 43074

**Response Deadline: February 28, 2025 at 12:00 p.m. local time**

The Owner seeks competitive Proposals for the above-identified services, subject to the terms and conditions of this Request for Proposals and the accompanying Contract Documents.

The services are being procured through a competitive proposal process outside the scope of the statutory bidding requirements for public school districts, as Ohio Revised Code Section 3313.46 does not require competitive bidding for the procurement of services. Any references in the Contract Documents to “bid” or “bidding” are to be read consistent with the proposal process being implemented.

## Article 1 — General Information

### 1.1 Initial Information.

**1.1.1 General Scope of Services.** The Vendor will provide HVAC technical support, maintenance, and mechanical system services for the Owner’s facilities (“Services”), which services are described in greater detail in **Attachment 1**. Vendor is encouraged to provide pricing for any additional services, not identified in Attachment 1, it believes would benefit Owner’s facilities and operations.

**1.1.2 Agreement.** The Proposers will provide their standard agreement with their proposal for the Owner to review. It is anticipated that the agreement proposed by the Selected Proposer(s) will be the basis for contract negotiations. However, Owner may propose an alternate agreement to be used in lieu of the agreement proposed by the Selected Proposer.

## Article 2 — Proposal Submission and Selection Process

### 2.1 Preparation of Proposals

#### 1. General Information

- a. Proposer information

Proposer’s name(s), contact to answer questions regarding proposal, contacts for each office location, addresses, telephone numbers and email addresses.

b. Description of organization

Include a description of your organization, which includes, but is not limited to, the following:

- Number of years in business under current ownership
- Company history including your experience with school districts.

c. Proposer's financial strength

Describe Proposer's financial condition during the past three (3) years. Identify if a merger occurred in this timeframe or if one is presently being entertained. Please provide the name of the organization and related contact information.

d. Monthly billing

Include a sample of the monthly invoice/reporting package the Owner would receive with explanations of any type of report and the methods used to gather the information.

e. References

Please provide three (3) relevant and separate contact references that the Owner may contact for contracts you were awarded during the last three (3) years.

f. Compliance with Federal, State, and Local Laws, Rules, and Regulations

Proposers should have a record of consistent compliance with federal, state, and local laws, rules, and regulations, including but not limited to the Occupational Safety and Health Act.

## 2. Services Approach

- a. Proposers should provide a conceptual plan for the Services and tentative schedule.

## 3. Value Added Services

- a. Customer service representative & coverage

Describe how your customers are serviced by your current service structure. What are the days and times your customer service representatives are available?

### 2.1.1 Proposals must follow the following format guidelines:

- .1 Proposals shall be formatted for letter-size (8.5" x 11") paper.
- .2 Page numbers must be included at the bottom of each page.
- .3 Minimum 12-point font.

### 2.1.2 Submit the original Proposal to the Owner in hard copy and an electronic copy of the Proposal prior to the Response Deadline.

**2.1.2.1** The original Proposal shall be enclosed in a sealed opaque envelope with the Proposer's name and "**Big Walnut LSD - HVAC Technical Support, Maintenance, and Mechanical System Services Proposal**" printed in the upper left-hand corner and addressed to:

**Big Walnut Local School District Board of Education**  
**Attn: James Hall, Director of Facilities**  
**110 Tippet Court**  
**Sunbury, Ohio 43074**

The electronic copy of the Proposal shall be submitted as one PDF file, named with the Proposer's name and "HVAC Technical Support, Maintenance, and Mechanical System Services Proposal," via email to **James Hall, Director of Facilities, at [jameshall@bwls.net](mailto:jameshall@bwls.net)**. In addition to the above, individuals and firms are required to upload an electronic copy of their submission to the following ShareFile link:

<https://bricker.sharefile.com/r-r848c997c165e49c1baef6d4b75dc02aa>

(To access, simply enter the ShareFile link into your web browser, enter your name and email address and then "drag and drop" your electronic file into the folder or use the browse function to locate the file.)

**2.2 Opening of Proposals.** Proposals will be accepted until the Response Deadline. Each Proposer is responsible for ensuring that its Proposal is received by the Owner in accordance with this Request for Proposals by the Response Deadline. The Owner reserves the right to accept a Proposal after the Response Deadline, in its sole discretion.

**2.3 Evaluation of Proposals.**

**2.3.1 Standard of Award.** The Owner intends to award the Contract for the Services to the Proposer submitting the Proposal determined to be in the Owner's best interest (the "Selected Proposer"), with price being considered, but not being the determining factor. The Owner reserves the right to negotiate pricing for the Services with the Selected Proposer.

**2.3.2 Clarification of Proposals.** The Owner reserves the right to discuss the contents of the Proposal with the Proposer and request additional information from the Proposer.

**2.3.3 Evaluation Criteria.** The Owner, in its sole discretion, will evaluate the Proposers and Proposals to determine which Proposal is in the Owner's best interest.

**2.3.4** By submitting its Proposal, the Proposer agrees that Owner's determination of which Proposal is in the best interest of the Owner will be final and conclusive, and that if the Proposer, or any person at Proposer's urging, directly or indirectly challenges such determination in any legal proceeding and such challenge is not successful, Proposer will reimburse Owner for all legal fees and expenses incurred by Owner that are related to such challenge, including the cost of collection.

**2.3.5** The Owner reserves the right to select one or more Proposers for different scopes of the Services. The Owner further reserves the right to award different Services separately and at different times.

**2.4 Negotiation of Contract.**

**2.4.1** The Owner will negotiate a contract with the Selected Proposer.

**2.4.2** The Proposers will submit their standard agreement for Services with its Proposal for the Owner to review. It is anticipated that the agreement proposed by the Selected Proposer will be the basis for contract negotiations. However, Owner may propose an alternate agreement to be used in lieu of the agreement proposed by the Selected Proposer.

**2.4.3** If for any reason the Owner and Selected Proposer are unable to negotiate and execute an agreement, the Owner may suspend negotiations with the Selected Proposer and initiate negotiations with the next Proposer determined to be in the Owner's best interest, and so on, until an agreement for the Services is fully executed, or the Owner rejects all Proposals.

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## Article 3 — Additional Instructions

### 3.1 Questions

**3.1.1** All questions must be submitted in writing to **James Hall, Director of Facilities, at [jameshall@bwls.net](mailto:jameshall@bwls.net)**, by 2:00 p.m. five (5) days prior to the submission deadline provided above. The questions and answers will be emailed to all individuals and firms that were provided with a copy of the Request for Proposals.

**3.1.2** The Owner may also email other Project-related information to the individuals and firms that were provided with a copy of the Request for Proposals.

#### 3.1.3 Addenda.

**3.1.3.1** Should any question prompt the Owner to amend the Request for Proposals, a notice will be sent to all individuals and firms that were provided with a copy of the Request for Proposals. Addenda will be deemed to have been validly given if emailed or otherwise furnished to each Proposer's contact person of record.

**3.1.3.2** When an Addendum to this Request for Proposals is necessary less than three days before the Proposal deadline, the Owner may extend the Proposal deadline through an announcement via email. The Owner will make reasonable attempts to contact all necessary individuals.

### 3.2 Proposal Certifications

**3.2.1** By submitting a Proposal, the Proposer certifies to the Owner that:

**3.2.1.1** the Proposer is not the subject of an unresolved finding for recovery issued by the Auditor of State under ORC Section 9.24;

**3.2.1.2** the Proposer has not been found by a court to be in default of a judgment or breach of settlement agreement; and

**3.2.1.3** the Proposer has not violated ORC Section 3517.102 by exceeding allowable campaign contributions.

### 3.3 Cancellation and Rejection; Waiver of Minor Irregularities

**3.3.1** The Owner may reject all Proposals and cancel all or any portion of this solicitation at any time for any reason. The Owner will have no liability to any Proposer arising out of any cancellation of this solicitation or rejection of any related submission.

**3.3.2** The Owner shall reject a Proposal if the Owner determines that:

**3.3.2.1** the Contract cannot be awarded under ORC Section 9.24 because the recommended Proposer has a finding for recovery issued by the Auditor of State, and the finding for recovery is unresolved;

**3.3.2.2** the recommended Proposer has violated ORC Section 3517.102 by exceeding allowable campaign contributions; or

**3.3.2.3** the Owner has determined that the Proposer intended to engage or engaged in collusion with intent to defraud or other illegal practices.

**3.3.3** The Owner may waive minor irregularities in its sole discretion.

**3.4 Proposal Revision.** The Owner may request a Proposer submit a revised Proposal to clarify any questions which may arise while evaluating the Proposals. If the Owner requests a clarification of any Proposal, the Proposer must submit the clarification in writing to the Owner within 3 business days.

**3.5 Proposal Withdrawal.** If the Selected Proposer withdraws its proposal after selection, the Owner may award the Contract to the firm next determined to be in the Owner's best interest.

**3.6 Applicable Law and Forum.** The rights of any Proposer or any party to a subsequent Agreement shall be governed by Ohio law, and only the Court of Common Pleas where the Owner is located shall have

jurisdiction over any action or proceeding related to the Proposal or any subsequent Agreement. The Proposer irrevocably consents to that jurisdiction.

**3.7 Public Records.** Pursuant to ORC Section 9.28, documents submitted to the Owner in response to this Request for Proposals will not be available for public inspection under ORC Section 149.43 until after the Owner either enters into a contract for the Work or cancels this Request for Proposals.

**3.8 Expenses of the Proposers.** The Owner accepts no liability for the costs and expenses incurred by the Proposers in responding to this Request for Proposals, responding to clarification requests and discussion meetings, preparing resubmittals, potential interviews, subsequent negotiations, and any other activities included as part of this procurement process. Each Proposer shall prepare the required materials and submittals and attend meetings and interviews at its own expense.

#### **Article 4 — Attachments**

##### **4.1 Attachment 1. Scope of Services**

[End of Request for Proposals]

## Technical Support for HVAC Controls

Buildings:

Central Plant  
Prairie Run Elementary  
Big Walnut High School

Service:

1. System and Service Review
2. Preventative Maintenance
3. Software Maintenance
4. Database Protection
5. Telephone Support
6. Remote Service Support
7. System and Service Log
8. Scheduled and Unscheduled Documentation.
9. Business Day Service
10. Emergency Service
11. On-Site Service

Equipment:

Quantity	Equipment	Manufacturer	Frequency
239	VAV Controls	Alerton	Monitor Annually
16	AHU Controls	Alerton	Monitor Annually
24	Exhaust Fan Controls	Alerton	Monitor Annually
5	Boiler Controls	Alerton	Monitor Annually
3	Chiller Controls	Alerton	Monitor Annually
14	Pump package	Alerton	Monitor Annually
15	Cabinet Heater Controls	Alerton	Monitor Annually
1	Cooling Tower Controls	Alerton	Monitor Annually
1	Server Workstation	Dell	Monitor Annually
3	Building Controller	Alerton	Monitor Annually

## Attachment 1 – Scope of Services

### Preventative Maintenance Controls:

1. Network Workstation
2. Controllers
3. Field Devices
4. Software and Communications
5. Global Controllers
6. IP Controllers and Expansion Devices
7. Visual Logic Controllers
8. On-site Commissioning and Seasonal Startups
9. Air Handling and Roof Top Units

### Mechanical System Service:

This is not a complete list. The selected Proposer will be responsible for checking with manufacturers of equipment to ensure all required inspections/maintenance is completed.

1. Cooling Tower
  - a. Inspect blow-down drain valve.
  - b. Inspect sump and strainer.
  - c. Inspect electrical connections.
  - d. Inspect fan blades.
  - e. Lubricate field serviceable bearings.
  - f. Check for proper water flow.
  - g. Check for evidence or build-up or fouling on tower fill.
  - h. Drain tower and power wash sump.
  - i. Check cooling tower motor(s) and /or pump(s) for proper operation.
  - j. Fill the cooling tower.
2. Fan Coil- Hot Water Unit- Cabinet Heaters.
  - a. Check air filter and housing integrity.
  - b. Check P-Trap.
  - c. Check for proper operation of cooling or heating coil.
  - d. Inspect electrical connections and tighten as needed.
  - e. Check blower motor and housing assembly.
  - f. Check integrity of all panels on equipment.
  - g. Lubricate field serviceable bearings.
3. Exhaust/Return Fan
  - a. Check fan belt.
  - b. Check drive alignment, wear, bearing.
  - c. Inspect fan blades.
  - d. Inspect brackets and housing.
4. Hot Water/ Chilled Water/ Condenser Water/ Pump.
  - a. Inspect electrical connections and tighten as needed.
  - b. Check variable frequency drive for proper operation.
  - c. Inspect drive alignment, were, bearing and coupling.

## Attachment 1 – Scope of Services

- d. Lubricate field serviceable bearings.
- 5. Chiller- Water Cooled
  - a. Check UCM for fault codes.
  - b. Check electrical connections.
  - c. Fill tower.
  - d. Start chilled and condenser water pumps.
  - e. Remove oil sample and send to lab for testing and analysis.
  - f. Check refrigerant systems pressures and temperatures.
  - g. Mechanically clean condenser tubes.
  - h. Check sub-cooling and super heat.
  - i. Shut the chiller for season.
- 6. Indoor Section Ductless Systems
  - a. Check and clean filter.
  - b. Verify proper operation of thermostat control.
  - c. Check P-Trap drain.
  - d. Inspect evaporator coil.
  - e. Check fan section.
  - f. Check integrity of all panels on equipment.
  - g. Lubricate all serviceable bearings.
  - h. Check drain pan, drain line and coil for biological growth.
- 7. Furnace
  - a. Clean air filter for mini splits and change air filter on furnaces.
  - b. Check sequence of operation.
  - c. Inspect electrical connections and tighten as needed.
  - d. Inspect fan section.
  - e. Check integrity of all panels on equipment.
  - f. Lubricate field serviceable bearings.
  - g. Visually check integrity of combustion chamber, burner and flue piping.
  - h. Check burners and combustion chamber for possible leaks.
- 8. Boiler
  - a. Check operating and safety controls.
  - b. Check electrical connections and tighten as needed.
  - c. Check burner sequence operation.
  - d. Inspect burner assembly and clean as necessary.
  - e. Check for evidence of build-up or fouling on heat exchange surfaces/tubes. Clean as needed.
  - f. Perform combustion test.
  - g. Check combustion chamber, burner and flue for deterioration, moisture problems, condensation and combustion products. Clean, test, and adjust combustion process for proper operation.
  - h. Check the pressure relief valve and automatic water fill control.
  - i. Inspect pilot ignitor assembly to verify proper operation. Check and adjust electrodes where applicable. Adjust as needed.
  - j. Check expansion, feed and/or condensate tanks.



## Attachment 1 – Scope of Services

### 9. Kitchen

- a. Make up air unit-Kitchen hoods.