HVAC Contractor Statement of Work – Request for Proposals

ISANA Octavia Academy
3010 Estara Avenue, Los Angeles, CA 90065
Replace HVAC Systems, Duct Repair and Sealing,
April 12, 2019

This document is an invitation to qualified HVAC contracting firms to bid on the turnkey (Design-Build) Engineering, Design, Electrical, Permitting, Installation, and Commissioning Support of of two (2) packaged AC units, two (2) window AC units, two (2) rooftop packaged heat pump units, and eight (8) wall -mounted heat pump units. This document and all submittals will become a contract exhibit for the successful bidder. The HVAC projects is intended to be undertaken as soon as possible. Funding has been approved under California Proposition 39, and the total cost of the HVAC system retrofit will need to fall within the State-approved budget for the included energy efficiency measures.

Clients: ISANA Octavia Academy, 3580 Wilshire Blvd., Suite 1130, Los Angeles, CA 90010
Nadia Shaiq, President and CEO

Energy Manager: First Note Finance inc.,Coronado, CA  92118
James Richmond & Chris Ing, Energy Managers
James@FirstNoteFinance.com ; Chris@FirstNoteFinance.com

Local Jurisdiction: Division of the State Architect (DSA) Los Angeles Regional Office, 700 N. Alameda Street, Los Angeles, CA  90012, Tel: (213) 897-3995.

Contractor Pre-Bid Walk-Through: Friday, April 26, 2019. All bidding contractors will survey the premises at one time from 11:30 AM to 12:30 PM at 3010 Estara Avenue, Los Angeles, CA 90065. This will be the only opportunity to survey the premises before proposals are due. Please RSVP at Amanda@firstnotefinance.com

Questions and Answers: Bidder questions shall be submitted by electronic mail by close of business on Tuesday, April 30, 2019. Answers to all questions will be provided in writing to all interested parties on or before Thursday, May 2, 2019. Please send questions to Amanda@FirstNoteFinance.com

Proposal Due Date: Friday May 10, 2019, 4:00 PM. Please read and follow carefully all instructions on the Bid Submittal Requirements and Bid Form and Schedule of Values. Please send bids to Amanda@FirstNoteFinance.com

Facilities and Layout

HVAC system replacements for the main buildings is included in this RFP. These include the following units:

<table>
<thead>
<tr>
<th>LEA (e.g. school)</th>
<th>Street Address</th>
<th>Floor Area (sf)</th>
<th>Inst. Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISANA Octavia Academy</td>
<td>3010 Estara Avenue</td>
<td>24,670</td>
<td>As soon as possible</td>
</tr>
</tbody>
</table>
Equipment Scheduled for Replacement

<table>
<thead>
<tr>
<th>Building</th>
<th>Tag #</th>
<th>System (Existing)</th>
<th>Quantity</th>
<th>Estimated Capacity (Existing)</th>
<th>Replacement Efficiency (Minimum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>C Building</td>
<td></td>
<td>Packaged AC TRANE YCP048F1H0AB</td>
<td>2</td>
<td>4 Tons/each</td>
<td>SEER-14</td>
</tr>
<tr>
<td>C Building</td>
<td>HP-11</td>
<td>Packaged Heat Pump Trane WCC048F400BF</td>
<td>1</td>
<td>4 Tons</td>
<td>SEER-15</td>
</tr>
<tr>
<td>C Building</td>
<td>HP-10</td>
<td>Packaged Heat Pump Trane WCC048F400BF</td>
<td>1</td>
<td>4 Tons</td>
<td>SEER-15</td>
</tr>
<tr>
<td>A Building</td>
<td></td>
<td>Wall Mounted Heat Pump Bard WH431-COZAP4XXB</td>
<td>2</td>
<td>3.5 Tons/each</td>
<td>EER-11, IPLV-14</td>
</tr>
<tr>
<td>A Building</td>
<td></td>
<td>Wall Mounted Heat Pump Bard WH381-COZAP4XXB</td>
<td>2</td>
<td>3 Tons/each</td>
<td>EER-11, IPLV-14</td>
</tr>
<tr>
<td>A Building</td>
<td></td>
<td>Window AC Amana</td>
<td>2</td>
<td>1.5 Tons/each (est.)</td>
<td>SEER-18</td>
</tr>
<tr>
<td>A Building</td>
<td></td>
<td>Wall Mounted Heat Pump Bard WH491-COZAP4XXB</td>
<td>4</td>
<td>4 Tons/each</td>
<td>EER-11, IPLV-14</td>
</tr>
</tbody>
</table>

**Note:** Selected contractor shall verify system capacity before ordering replacement equipment.

**Minimum Efficiency Specification:** All replacement heat pump systems shall be SEER-15 or better. All replacement rooftop packaged AC systems shall be SEER 14 or better. All replacement mini-split systems shall be SEER-18 or better. All replacement wall mounted AC and heat pump units shall be 11.0 EER at full load and have a minimum Integrated Part Load Value (IPLV) of 14.0. If the equipment is rated in EER, not SEER, the systems shall be EER 12.2 or better.

**Thermostats:** Contractor shall integrate its installation to the existing thermostats, or provide new programmable thermostats, at its option.

**Schedule Summary**

- **Facilities Pre-Bid Walk-Through:** Friday, April 26, 2019, 11:30 AM - 12:30 PM PST
- **RFP Questions Due:** April 30, 2019 4:00 PM PST
- **RFP Answers Provided:** May 2, 2019 4:00 PM PST
- **RFP Proposals Due:** May 10, 2029 4:00 PM PST
- **Contractor Selection:** To be determined.
- **Contracting:** To be determined.
- **Installation:** As soon as possible.
(2) Packaged HP Trane (4 tons/each)

(2) Packaged AC Trane (4 tons/each)

(2) Wall Mounted HP (3 tons/each)

(2) Wall Mounted HP (3.5 tons/each)

(4) Wall Mounted HP (4 tons/each)

(2) Window AC (1.5 tons/each) est.
Preliminary Discussion

HVAC Inventory: An onsite survey performed by First Note Finance resulted in a comprehensive HVAC equipment inventory. Only some of the equipment inventoried is scheduled for replacement, and these units are identified in the tables on page 2. Bids shall be based on this inventory with regard to equipment quantities, types and sizes. Prospective bidders should also field-verify existing equipment to ensure inventory accuracy.

Responsiveness: Your complete and responsive bid is requested. Bids that are not responsive or incomplete, or are submitted after the due date and time, will be rejected. For your bid to be considered responsive and complete, the following turnkey services are required, and shall be accepted by the building owner (Client).

Best Value: Price of the HVAC retrofit is important. A responsive bid will be evaluated based on the price submitted, and whether it meets the budget parameters of the approved Proposition 39 funding. However, price is not the only consideration. Bids will also be evaluated based on the (perceived) quality of materials and equipment, warranty considerations, and company reputation, track record, and project references. The Client will choose the successful bidder and a contract awarded based on its own calculation of Best Value, at its sole discretion. The Client’s decision will be final and Client withholds the right to reject any and all bids received without explanation.

Prevailing Wage: These projects are funded in whole or in part using Proposition 39 Clean Energy Jobs Act funding. This statute prohibits sole sourcing of contractors and requires compliance with applicable Prevailing Wage law. It also requires your firm to be registered with the CA Department of Industrial Relations, which involves paying them a $400 registration fee, in order to be eligible to be paid from Proposition 39 funding.

No Payment for Bids: A bidder will not be compensated for its costs of submitting a bid.
Budget Considerations

Project implementation funding has been secured via the California Proposition 39 Clean Energy Jobs Act.

These (funded) energy efficiency measures are the basis of the Project for which a Scope of Work is included in this Request for Proposal. Project funding has been secured via the California Proposition 39 Clean Energy Jobs Act.

Scope of Work

1. Feasibility Study
2. Complete Engineering and Obtain Building Permits
3. Apply for Rebates and/or Incentives
4. Replace HVAC Systems and programmable thermostats
5. Removal and Disposal of Old Equipment and Material
6. Repair and seal ductwork as needed
7. Commission installed HVAC Systems

Scope of Work - Discussion

1. Feasibility Study – The selected contractor will perform a feasibility study in order to determine in advance of filing for permits or beginning construction, any issues that may arise that will affect the schedule or cost of the project. Contractor will have the opportunity to survey the premises including the roofs and plenums, possible locations for a crane, onsite staging of demolished equipment, condition of wiring and circuits, etc.

2. Complete Engineering and Obtain Building Permits – This is a Design-Build construction process. Contractor is responsible for obtaining building permits as well as obtaining any engineering drawings /and/or specifications that are required by the local jurisdiction in order to obtain a building permit, including but not limited to Structural, Mechanical, and/or Electrical Engineering, stamped by a licensed professional engineer (California). As-built drawings in electronic format (AutoCAD & PDF) of the completed (phases) of the project are required deliverables for final acceptance by the client.

3. Apply for Rebates and/or Incentives– Contractor shall complete and submit utility rebate and/or incentive reservations and applications for all applicable rebates or incentives available. The estimated amount of the rebate should be submitted with the Contractor’s bid.

4. Replace HVAC Systems – Contractor shall provide a fixed price for the replacement of the existing HVAC systems. Price shall be turnkey and include all equipment plus programmable thermostats, material, parts, and demolition and installation labor required to complete the installations, including the cost of equipment delivery to the site, and crane to set the new equipment on the roof, and remove the old equipment from the roof. Contractor shall include in its price the cost of replacing or re-configuring roofing curbs to fit the new equipment if, and as, needed. Contractor shall hire and pay as a subcontractor, the School’s roofing contractor, that will repair and fit roofing material as needed on equipment curbs, as well as patch any damage to the roof resulting from the demolition and/or installation. Contractor shall hire and pay as a subcontractor, an electrical contractor, that will disconnect the existing equipment, and connect the new equipment, providing service disconnects,
wiring and over-current protection devices if and as needed, or required by code. Contractor shall test and verify system operation. Again, this is a Design-Build construction process. Contractor is responsible for obtaining final approval from the local jurisdiction.

5. Additionally, the following specifications are requirements and shall be included in the Contractor’s bid price:

   a. **Economizers**: Outdoor air temperature economizers are required for the Packaged Rooftop Unit Heat Pumps and AC units. Yes, even if they are less than 5 tons capacity.

   b. **Minimum Efficiency Specification**: All replacement heat pump systems shall be SEER-15 or better. All replacement rooftop packaged AC systems shall be SEER 14 or better. All replacement mini-split systems shall be SEER-18 or better. All replacement wall mounted AC and heat pump units shall be 11.0 EER at full load and have a minimum Integrated Part Load Value (IPLV) of 14.0. Condensing furnaces shall be AFUE 0.92 or better. If the equipment is rated in EER, not SEER, the systems shall be EER 12.2 or better.

6. **Removal and Disposal of Old Equipment and Material** – Contractor shall remove from the premises and provide for proper and lawful disposal of the old HVAC equipment as well as any waste material resulting from the demolition. Contractor shall remove, transport, and properly and lawfully dispose of any refrigerants in the existing systems.

7. **Repair and seal plenum & outdoor-exposed ductwork as needed** – Contractor shall seal with mastic the installed HVAC unit to the supply and return plenums, as well as any outdoor-exposed ductwork as part of the installation.

8. **Commissioning of installed HVAC systems** – Contractor shall integrate to the existing or provide new thermostats and field verify setpoints and schedules.
Bid Submittal Requirements

1. **Company Profile:** Please submit a company profile including the following information:
   a. Company name, entity type, address, telephone, email.
   b. Number of employees,
   c. Number of years in business,
   d. Professional certifications,
   e. Number of commercial HVAC projects completed in the last five years.
   f. Please provide the name of the company owner, president or CEO.
   g. Please provide the name and contact information of the designated project and/or construction manager for this project.

2. **Project Experience:** Please provide brief project descriptions for similar Design-Build projects your firm has performed, including engineering through system commissioning.

3. **Project Schedule Narrative:** Please provide a narrative for your anticipated, proposed project schedule couched in terms of number of days from receiving a signed contract for critical needs phase. Please indicate the amount of time you anticipate it will take to obtain a building permit, if needed. Please describe your installation approach. Please explain how you plan to coordinate your installation so that roofing repairs are accomplished as needed at roof curbs to prevent roof leaks.

4. **Project References:** Please provide references for three (3) completed projects, of the same approximate size and scope, including contact information for the client you were directly responsible to. Name, address, telephone, email, and a brief project description.

5. **Warranty:** Please provide a copy of your Standard Warranty.

6. **Product Information:** Please provide cut sheet information for the exact products proposed for this project, including heat pumps, rooftop A/C systems, split-system A/C systems, smart thermostats and user interface software.

7. **Bid Form:** Please complete the following Bid Form & Schedule of Values.
**Bid Form - Schedule of Values – ISANA Octavia Academy, HVAC**

For your bid to be accepted as responsive, all blanks in both tables below must be filled in with a price, or “N/A”, or “included”. Leaving blanks may result in your bid being rejected.

3010 Estara Avenue, Los Angeles, CA 90065

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Prepare and Submit Feasibility Study</td>
<td></td>
</tr>
<tr>
<td>2 Obtain Engineering and Permits</td>
<td></td>
</tr>
<tr>
<td>3 Secure and Assist with Collection of Rebates &amp;</td>
<td></td>
</tr>
<tr>
<td>4 Replace (2) Packaged AC Units</td>
<td></td>
</tr>
<tr>
<td>5 Replace (2) Window AC Units</td>
<td></td>
</tr>
<tr>
<td>6 Replace (2) Packaged Heat Pump Units</td>
<td></td>
</tr>
<tr>
<td>7 Replace (8) Wall Mounted Heat Pump Units</td>
<td></td>
</tr>
<tr>
<td>8 Removal/Disposal</td>
<td></td>
</tr>
<tr>
<td>9 Repair &amp; Seal Ductwork</td>
<td></td>
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<tr>
<td>10 System Commissioning</td>
<td></td>
</tr>
<tr>
<td>11 Other Costs</td>
<td></td>
</tr>
<tr>
<td><strong>Fixed Turnkey Price, 3010 Estara Avenue, Los Angeles, CA 90065</strong></td>
<td><strong>$</strong></td>
</tr>
</tbody>
</table>

**Certification:** I, (name) ________________________________, am qualified to make this bid-offer commitment on behalf of my company. The fixed, turnkey price provided is all-inclusive. I understand that this bid is provided to the client without expectation for compensation of any kind for the cost of preparing it, and that the Client (ISANA Octavia Academy), or its designated Energy Manager (First Note Finance inc) may reject this bid if it is not responsive, complete or submitted after the due date of 4:00 PM on May 10, 2019.

_________________________________________  ________________________
(signature)  (date)

_________________________________________
(title)

Please submit your bid via email attachment on or before the date and time due to Leslie@FirstNoteFinance.com
Figure 1: Packaged Unit

Figure 2: Window AC

Figure 3: Wall Mounted HP

Figure 4: Wall Mounted HP