

RFP Title: **Mechanical and HVAC Inspection and Preventative Maintenance**
RFP Number: **4/2 RFP 13/14-06**



REQUEST FOR PROPOSALS

COURT OF APPEAL, 4TH APPELLATE DISTRICT, DIVISION 2

REGARDING:

RFP TITLE:

MECHANICAL AND HVAC INSPECTION AND PREVENTIVE MAINTENANCE

Inspection and preventive maintenance services for the Court of Appeal, 4th Appellate District Division 2
3389 12th Street, Riverside, CA 92501

RFP NUMBER:

4/2 RFP 13/14-06

PROPOSALS Due:

FEBRUARY 24, 2014, BY NO LATER THAN 4:00 P.M., (PACIFIC TIME)

1.0 Description of Services and Deliverables

The Court of Appeal, Fourth Appellate District, Division Two (Court) seeks the services of a person or entity with expertise in Mechanical and HVAC Systems. The court requires a qualified service provider to provide inspections and preventive maintenance to improve equipment operations, increase efficiency, minimize breakdowns and prolong equipment life and to perform scheduled inspections of the Court’s systems for a one year period, with two one-year options. The maintenance also includes filter service, water treatment service, and outdoor coil cleaning service.

The Service Provider will provide:

1.1 Mechanical and HVAC Inspections:

Visit the Court on a routine schedule to perform inspection tasks on the HVAC system that includes the following, as applicable:

Coils	Heat Exchangers	Condensate Drain
Compressor Operations	Refrigerant Piping	Oil Levels
Motor Operations	Bearings	Water Levels
Voltage and Amp Draws	Belts and Pulleys	Fans/Blades
Refrigerant Charge	Blowers	Reversing Valves
Cabinets and Ductwork	Operating/Safety Controls	Electrical/Relays and Contactors at Equipment

1.2 Preventive Maintenance Actions:

During scheduled inspections visits, provide proactive, hands-on maintenance services to improve equipment operations, increase efficiency, minimize breakdowns and prolong equipment life. Services may include but are not limited to:

Fan Blade/Blower Cleaning	Bearing Lubrications	Motor Lubrications
Safety Control Adjustments	Coil Cleaning	Condensate Drain Cleaning
Belt Adjustments/Replacements	Calibrations	Oil Analysis
Operating Control Adjustments	Equipment Cleaning	
Refrigerant Charge Adjustments		

1.3 Filter Service/Changes:

These services/changes will be scheduled at a frequency designed for best operating conditions and overall value to the Court. Type and frequency of service to be determined base on observed and expressed needs. Filter service to be included per schedule:

1. Removal and proper discard of used filters/medias
2. Provide and deliver to Court replacement filters/medias
3. Install Filters
4. Wash Filters as required and as applicable

1.4 Water Treatment Service:

Service Provider will conduct scheduled visits to test, analyze and adjust water treatment levels as applicable. This Service is to include the chemicals required to maintain levels

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within industry specifications as well as calibrations and operational testing of existing treatment equipment.

1.5 Outdoor Coil Cleaning Service:

This service will improve efficiency and contribute to a longer coil and equipment life. The Service Provider is to use environmental and equipment safe cleaning agents to outdoor coil surfaces and rinse with pressured water.

2.0 SERVICES:

Type of Service	Frequency
Preventive Maintenance Actions AC Units	4
Annual Maintenance on AC Units	1
Pre-Filter Service TYPE: TriDim 60% Efficient Panel Links	4
Andover DDC Controls Maintenance	Per DDC Schedule
Water Treatment Service on Hot Water Boiler	Monthly
Outdoor Condenser Coil Cleaning Service	7
Hot Water Boiler Maintenance	3
Hot Water Boiler Annual Maintenance	1
Hot Water Pump & Expansion Tank Maintenance	4
Infrared Electrical Panel Testing	Annually
Final Filter Service TYPE: TriDim 98% Efficient Cubes	Annually
Variable Frequency Drive Maintenance	Annually
Belt Replacement on AC and Exhaust Fans	Annually
Computerized Documentation	Annually

2.1 List of Covered Equipment:

Unit #	Make	Model	Serial	Size	Type
AC 1	Trane	SXFC7540P88E9AD8F01T8	J98D1132	75 Ton	Package Unit; Rooftop Box Car
AC 2	Trane	SXFC7540P88E9AD8F01T8	J98D1131	75 Ton	Package Unit; Rooftop Box Car
AC 1 VFD-1	ABB			40 HP	Variable Speed Drive
AC 1 VFD-2	ABB			20 HP	Variable Speed Drive
AC 2 VFD-1	ABB			40 HP	Variable Speed Drive
AC 2 VFD-2	ABB			20 HP	Variable Speed Drive
ACC-1 (Serves Rm-116)	Trane	TTA072C/400A		6 Ton	Condensing Unit; Air Cooled

Unit #	Make	Model	Serial	Size	Type
FC-1 Rm-116	Trane	TEW060AO		6 Ton	Fan Coil
B-1	Raypak	Space Heating Water		BTU	Water
B-2	Raypak	Domestic Water		500,000 BTU	Boiler; Hot Water
ET1		Space Heating HW		30 Gal	Boiler; Hot Water
P-1		Space Heating HW		1.5HP	Circuit Pump
P-2		Space Heating HW		1.5 HP	Circuit Pump
P-3		Space Heating HW		Fractional	Circuit Pump
EF-1	Carnes	VEBK18P1A14A20SPCI	345321-011	Fractional	Fan; Exhaust
EF-2	Carnes	VEBK18P1A14A20SPCI	229061007	Fractional	Fan; Exhaust
A-1	Andover	Automation Controls			Controls: DDC

2.2 BOILERS

1. Inspect fireside of boiler and record condition (**annually**).
2. Brush soot and dirt from combustion chamber (**annually**).
3. Inspect firebrick and refractory for defects (**annually**).
4. Visually inspect boiler pressure vessel for possible leaks and record condition.
5. Visually inspect expansion tank and adjust as required.
6. Disassemble, inspect and clean low-water cutoff (**annually**).
7. Check hand valves and automatic feed equipment. Repack and adjust as required.
8. Inspect, clean and lubricate the burner and combustion air equipment (**annually**).
9. Check fuel piping for leaks and proper support.
10. Check burner sequence of operation and combustion air equipment.
11. Review manufacturer's recommendation for boiler and burner start-up.
12. Check fuel supply.
13. Check auxiliary equipment operation.
14. Inspect burner, boiler and controls prior to start-up.
15. Start burner and check operating controls.
16. Test safety controls.

2.3 PACKAGED VARIABLE AIR VOLUME SYSTEMS (TRANE ROOF TOP PACKAGED AHU)

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 operation of hot gas by-pass.
5. Inspect electrical connections, contactors, relays, and operating/safety controls.
6. Check vibration eliminators. Replace or adjust when authorized.
7. Check compressor oil level. Change oil and refrigerant filter drier when authorized.
8. Check and test all operating and safety controls.
9. Inspect operating temperatures and pressures.
10. Check fan assembly.

11. Lubricate fan bearings per manufacturer's recommendations.
12. Lubricate motor bearings per manufacturer's recommendations.
13. Check belts and sheaves. Adjust as required and replace (**annually**).
14. Tighten all nuts and bolts.
15. Check motor mounts and vibration pads. Adjust as required.
16. Check motor operating conditions.
17. Lubricate and adjust associated dampers and linkage and controls.
18. Check fan operation.
19. Check VFD for proper operation.
20. Clean outside air intake screen.
21. Check and clean drains and drain pans.
22. Inspect filters. Change per schedule.
23. Check heating and/or cooling coils.

2.4 EXHAUST FANS

1. Inspect belts, adjust as required and replace (**annually**).
2. Lubricate motor and bearings as required.
3. Inspect starters, disconnect and clean contacts.

2.5 CONDENSING UNITS – AIR COOLED

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. Replace and adjust when authorized.
6. Check compressor oil level. Change oil and refrigerant filter drier when authorized.
7. Check and test all operating and safety controls.
8. Check operating conditions. Adjust as required.

2.6 FAN COIL UNITS

1. Inspect motor. Clean and lubricate.
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, adjust tension and replace (**annually**).
6. Test operation unit internal on-off switch.
7. Change filters per filter schedule.

2.7 PUMPS

1. Lubricate pump bearings per manufacturer's recommendations.
2. Lubricate motor bearings per manufacturer's recommendations.
3. Tighten all nuts and bolts. Check motor mounts and vibration pads. Replace and adjust when authorized.
4. Visually check pump alignment and coupling.
5. Check motor operating conditions.
6. Inspect electrical connections and contactors.
7. Check and clean strainers and check hand valves (**annually**).
8. Inspect mechanical seals. Inspect pump packing.

9. Verify gauges for accuracy.

2.8 WATER TREATMENT – HOT WATER BOILER

1. Provide, deliver and administer chemicals that have a history of proven results, designed to inhibit scale formation, corrosion and biological growth.
2. Provide monthly analysis of the water conditions, via on-site testing, accurately interpreting the results, making immediate adjustments and recommendations in order to meet industry standards.
3. Provide a visual inspection of the equipment and make a written recommendation of upgrades to help minimize energy and water usage.

2.9 VARIABLE FREQUENCY DRIVES

1. Inspect and tighten all nuts, bolts, and retaining devices on mechanical assemblies and mounting brackets.
2. Verify all electrical connections are at proper torque settings.
3. Clean/change all cooling filters and grills if applicable.
4. Remove all dirt and dust that has penetrated the unit interior or accumulated on the processor boards using high-pressure nitrogen.
5. Verify and record all inverter settings.
6. Verify all internal power supplies and all logic outputs. Record as applicable.
7. Check proper operation of DC buss capacitors.
8. Check all external controls related to the operation of the inverter.
9. Provide recommendation for repair, parameter changes, etc. in writing.

2.10 INFRARED ELECTRICAL PANEL TESTING

1. Provide up to sixteen hours of Infrared Electrical Panel Testing (**annually**).
2. Provide reports with recommendations.
3. Make drawing panel list for report.

3.0 BUILDING AUTOMATION CONTROLS (DDC) MAINTENANCE TASKS

3.1 Refer to DDC schedule for number of visits and hours per year that will be provided to accomplish the following:

1. Software maintenance, file maintenance and backups (on-site and remote) and system optimization.
2. Control sequence evaluation, modification and enhancement.
3. Historical log review.
4. Field sensor verification and calibration spot checks.
5. Hardware communication tests and functional verification.
6. Control program and loop evaluation, modification and enhancement.
7. Service Provider will be available for extra calls on a daily basis, five days per week, Monday through Friday during standard work hours.
8. Response time to any after-hours request is to be within four hours.
9. Remote dial-up technical support for up to four hours per year.
10. Excludes all wiring and conduit systems.

Because the Court has Andover equipment, the court’s preference is for a contractor who is Andover certified with a minimum of five (5) years experience and an Andover dealer. In addition, the contractor must include a “variable speed drive” division for the inverter maintenance. Please state in your proposal whether you: 1) are/ are not Andover certified with a minimum of five (5) years experience; and/or 2) are/ are not an Andover dealer; and 3) have a “variable speed drive” division.

3.2 DDC CONTROLS TECHNICAL SUPORT

The scope of services outlined below is a guide, not a limit of duties or obligations, as the intent of the agreement is to provide a comprehensive DDC Controls Technical Support and Maintenance Program as described herein.

DDC Equipment to Be Serviced:

Manufacturer	Quantity
B4920 Andover Bacnet controller.	1
B3885 Andover BACnet VAV Controllers	38
B3865 Andover BACnet VAV Controllers	37
Smart Sensors	37
Dumb Sensors	38
Andover Cyberstation	1
Infilinks	4

4.0 SERVICES NOT INCLUDED

- 4.1** Maintenance, repair or replacement of non-maintainable parts of the equipment included in the List of Covered Equipment such as, but not limited to, unit cabinets, insulating materials, electrical wiring, structural supports and other non-moving parts.
- 4.2** Replacement of the equipment included in the List of Covered Equipment, or if repairs are required because of vandalism, flooding, fire, lightning, roof leaks, power failure, installation of incompatible equipment, improper operating procedures, improper/inadequate water treatment or filter service not provide by the Service Provider or by any other cause beyond the control of the Service Provider.
- 4.3** Any and all additional items or equipment required by any governmental authority, insurance company or other, and not specifically set forth in the List of Covered Equipment and Services.
- 4.4** Except as may be specifically included in Services, the Service Provider shall not be responsible or obligated to provide service with respect to the following:
 - 1. Piping other than refrigerant piping.
 - 2. Damage due to freezing weather or corrosion of equipment.

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3. All non-moving parts such as pressure vessels, tubes, cabinets, casings, door seals, floor drains, thermometers, gauges, flues, ductwork, grilles, heat transfer tubes and coils, refractories, oil or gas heat exchangers, fan housings, structural support.
4. Valves.
5. Electrical supply, disconnect switches, circuit breakers.
6. Monitoring/Recording devices affixed to equipment.

5.0 WORK LOCATION AND HOURS

Service Provider will provide its mechanical maintenance and automation maintenance of the equipment located at 3389 Twelfth Street, Riverside, CA 92501 and set forth on the **List of Covered Equipment** provided for in this Request for Proposal, Building Services Agreement. All services provided under this agreement will be performed during normal working hours (Monday – Friday 7 a.m. – 5 p.m.) unless otherwise specified.

6.0 TIMELINE FOR THIS RFP

The Court has developed the following list of key events related to this RFP. All dates are subject to change at the discretion of the Court.

EVENT	DATE
RFP issued	January 24, 2014
Optional Walk Through	February 6, 2014 9:00 A.M. (Pacific Time)
Deadline for questions Email questions to: paula.garcia@jud.ca.gov	February 10, 2014 Close of Business
<i>Questions and Answers</i> posted	February 18, 2014
Latest date and time proposal may be submitted	February 24, 2014 4:00 P.M. (Pacific Time)
Evaluation of proposals (<i>estimate only</i>)	Week of February 24, 2014
Notice of Intent to Award (<i>estimate only</i>)	Week of March 3, 2014
Negotiations and execution of contract (<i>estimate only</i>)	Week of March 10, 2014
Contract start date (<i>estimate only</i>)	April 1, 2014
Contract end date (<i>estimate only</i>)	March 31, 2015

7.0 RFP ATTACHMENTS

The following attachments are included as part of this RFP:

ATTACHMENT	DESCRIPTION
Attachment 1: Administrative Rules Governing RFPs (Non-IT Services)	These rules govern this solicitation.
Attachment 2: Court Standard Terms and Conditions	If selected, the person or entity submitting a proposal (the “Proposer”) must sign this Court Standard Form agreement containing these terms and conditions (the “Terms and Conditions”).
Attachment 3: Proposer’s Acceptance of Terms and Conditions	On this form, the Proposer must indicate acceptance of the Terms and Conditions or identify exceptions to the Terms and Conditions.
Attachment 4: General Certifications Form	The Proposer must complete the General Certifications Form and submit the completed form with its proposal.
Attachment 5: Darfur Contracting Act Certification	Proposer must complete the Darfur Contracting Act Certification and submit the completed certification with its proposal.
Attachment 6: Payee Data Record Form	This form contains information the Court requires in order to process payments and must be submitted with the proposal.

8.0 SUBMISSIONS OF PROPOSALS

8.1 Proposals should provide straightforward, concise information that satisfies the requirements of the “Proposal Contents” section below. Expensive bindings, color displays, and the like are not necessary or desired. Emphasis should be placed on conformity to the RFP’s instructions and requirements, and completeness and clarity of content.

8.2 The Proposer must submit its proposal in two parts, the *Technical Proposal* and the *Cost Proposal*.

1. The Proposer must submit **one (1) original and three (3) copies** of the *Technical Proposal*. The original must be signed by an authorized representative of the Proposer. The Proposer must write the RFP title and number on the outside of the sealed envelope.
2. The Proposer must submit **one (1) original and three (3) copies** of the *Cost Proposal*. The original must be signed by an authorized representative of the Proposer. The original cost proposal and the copy must be submitted to the Court in a single sealed envelope, separate from the technical proposal. The Proposer must write the RFP title and number on the outside of the sealed envelope.

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8.3 Proposals must be delivered by the date and time listed on the coversheet of this RFP to:

Paula D. Garcia
Assistant Clerk/Administrator
Court of Appeal, 4th Appellate District, Division 2
3389 12th Street
Riverside, CA 92501

8.4 Late proposals will not be accepted.

8.5 Only written proposals will be accepted. Proposals must be sent by registered or certified mail, courier service (e.g., FedEx), or delivered by hand. Proposals may not be transmitted by fax or email.

9.0 PROPOSAL CONTENTS

9.1 Technical Proposal. The following information must be included in the technical proposal. A proposal lacking any of the following information may be deemed non-responsive.

1. Proposer's name, address, telephone and fax numbers, and federal tax identification number. Note that if Proposer is a sole proprietor using his or her social security number, the social security number will be required before finalizing a contract.
2. Name, title, address, telephone number, and email address of the individual who will act as Proposer's designated representative for purposes of this RFP.
3. Acceptance of the Terms and Conditions.
 - i. On Attachment 3, the Proposer must check the appropriate box and sign the form. If the Proposer marks the second box, it must provide the required additional materials. An "exception" includes any addition, deletion, or other modification.
 - ii. If exceptions are identified, the Proposer must also submit:
 - a. a red-lined version of the Terms and Conditions that implements all proposed changes; and
 - b. a written explanation or rationale for each exception and/or proposed change.
4. Certifications, Attachments, and Other Requirements.
 - i. The Proposer must complete the General Certifications Form (Attachment 4) and submit the completed form with its proposal.

- ii. The Proposer must complete the Darfur Contracting Act Certification (Attachment 5) and submit the completed certification with its proposal.
- iii. If Contractor is a California corporation, limited liability company (“LLC”), limited partnership (“LP”), or limited liability partnership (“LLP”), proof that Contractor is in good standing in California. If Contractor is a foreign corporation, LLC, LP, or LLP, and Contractor conducts or will conduct (if awarded the contract) intrastate business in California, proof that Contractor is qualified to do business, and is in good standing in California. If Contractor is a foreign corporation, LLC, LP, or LLP, and Contractor does not (and will not if awarded the contract) conduct intrastate business in California, proof that Contractor is in good standing in its home jurisdiction.
- iv. The Proposer must describe its capability in performing the inspection services and its experience in performing services of a similar nature.
- v. The Proposer must submit copies of its certifications for each individual that will perform inspections at the work location.
- vi. The Proposer must submit a sample inspection and preventive maintenance work plan for evaluation purposes.
- vii. The Proposer must submit its *Standard Agreement for Inspection and Maintenance Services* for evaluation purposes.

9.2 Cost Proposal. The following information must be included in the cost proposal.

1. A detailed line item budget showing total cost of the proposed services
2. A full explanation of all budget line items in a narrative entitled “Budget Justification,” including hourly rates.
3. A “not to exceed” total for all work and expenses payable under the contract, if awarded.
4. For each of the option years, provide either specific costs or a labor or cost index for any increase in the initial term’s costs.

NOTE: It is unlawful for any person engaged in business within this state to sell or use any article or product as a “loss Leader” as defined in Section 17030 of the Business and Professions Code.

10.0 OFFER PERIOD

A Proposer's proposal is an irrevocable offer for ninety (90) days following the proposal due date. In the event a final contract has not been awarded within this period, the Court reserves the right to negotiate extensions to this period.

11.0 EVALUATION OF PROPOSALS

At the time proposals are opened, each proposal will be checked for the presence or absence of the required proposal contents.

The Court will evaluate the proposals on a 100 point scale using the criteria set forth in the table below. Award, if made, will be to the highest scored proposal.

If a contract will be awarded, the Court will post an *Intent to Award* notice at www.courtinfo.ca.gov.

CRITERIA	MAXIMUM NUMBER OF POINTS
Quality of work plan submitted	10
Experience	30
Reasonableness of cost projection	30
Credentials of staff to be assigned to the project	20
Acceptance of the Terms and Conditions	10
Total Number of Points	100

12.0 INTERVIEWS

The Court may conduct interviews with Proposers to clarify aspects set forth in their proposals or to assist in finalizing the ranking of top-ranked proposals. The interviews may be conducted in person or by phone. If conducted in person, interviews will likely be held at the Court’s offices. The Court will not reimburse Proposers for any costs incurred in traveling to or from the interview location. The Court will notify eligible Proposers regarding interview arrangements.

13.0 CONFIDENTIAL OR PROPRIETARY INFORMATION

PROPOSALS ARE SUBJECT TO DISCLOSURE PURSUANT TO APPLICABLE PROVISIONS OF THE CALIFORNIA PUBLIC CONTRACT CODE AND RULE 10.500 OF THE CALIFORNIA RULES OF COURT.

The Court will not disclose (i) social security numbers, or (ii) balance sheets or income statements submitted by a Proposer that is not a publicly-traded corporation. All other information in proposals will be disclosed in response to applicable public records requests. Such disclosure will be made regardless of whether the proposal (or portions thereof) is marked “confidential,” “proprietary,” or otherwise, and regardless of any statement in the proposal (a) purporting to limit the Court’s right

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to disclose information in the proposal, or (b) requiring the Court to inform or obtain the consent of the Proposer prior to the disclosure of the proposal (or portions thereof). Any proposal that is password protected, or contains portions that are password protected, may be rejected. Proposers are accordingly cautioned not to include confidential, proprietary, or privileged information in proposals.

14.0 DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION GOALS

The Court has waived the inclusion of DVBE participation in this solicitation.

15.0 PROTESTS

Any protests will be handled in accordance with Chapter 7 of the Judicial Branch Contract Manual (see www.courts.ca.gov/documents/jbcl-manual.pdf). Failure of a Proposer to comply with the protest procedures set forth in that chapter will render a protest inadequate and non-responsive, and will result in rejection of the protest. The deadline for the Court to receive a solicitation specifications protest is the proposal due date. Protests should be sent to:

Manuel A. Ramirez, Presiding Justice
Court of Appeal, Fourth Appellate District, Division 2
3389 Twelfth Street

END OF RFP