

**Invitation for Bid
AEPA IFB #021.75
HVAC AND MECHANICAL PRODUCTS AND SOLUTIONS**

Part B – Technical Specifications

Table of Contents

1.	Scope of Bid	1
2.	Type of Bid	1
3.	Anticipated AEPA Member Agency Participation	3
4.	Anticipated Volume	3
5.	Voluntary Pre-Bid Conference Call	3
6.	Glossary of Terms and Abbreviations	3
7.	Standard Specifications	4
8.	Product Category Specific Specifications	5
9.	Pricing – See Pricing section in Part A – General Terms & Conditions for details.....	7
10.	Evaluation	8

1. Scope of Bid

AEPA is seeking qualified, and experienced supplier(s) who possess the necessary resources and capabilities to acquire, deliver and perform the required supplies, materials equipment, and labor to all participating member states (up to 29) in the category of **HVAC and Mechanical Products and Solutions**.

AEPA and our member states will require the bid to be turnkey, inclusive that the awarded bid(s) include HVAC equipment, ancillary goods, service and installation including recycling or re-purposing old equipment.

AEPA and our member states will prefer a national distributor that can provide these turnkey solutions to all 29 member states.

- a. Respond to requests from different types of educational, governmental, and public institutions seeking parts/equipment/installation/maintenance for HVAC and Mechanical Products and Solutions.
- b. These parts and equipment will include but are not limited to:
 - o Consultation and installation of equipment related to HVAC Systems & Temperature Control
 - o Provide members with site visits (if needed) and a proposal for a cost estimate for the facility
 - o Ancillary HVAC & Metering equipment
 - o Servicing for 1Yr and 5 Yr plans after purchasing new equipment
 - o Integrated equipment related to software and accessories
- c. Types of services may include but are not limited to installation, associated professional services, environmental assessments, project management, implementation, training, technical supports, and marketing services that aid in fundraising for the project.

All products offered must be considered new, unused, of the latest design and technology and from the most current and popular HVAC product lines available.

AEPA and Member Agencies prefer a single vendor with a comprehensive array of products. However, because of the unique nature of HVAC and Mechanical Products and Solutions, Member Agencies may consider multiple awards, if the lowest, best-value bids come from Bidders whose business concentrates on a subset of HVAC Systems, such as:

1. HVAC Refrigeration
2. Indoor Air Quality Products and Devices
3. State-of-the-art Filtration and Air Purification System to meet or exceed following criteria:
 - a. HVAC Systems that deliver air for occupied spaces with HEPA grade filtration of 99.7%, particular removal of .3 micron tested.
 - b. Airflow sensor across filter / filter indicator switch
 - c. Airflow station for outside air intake and Supply Discharge
 - d. Static pressure sensor across the cooling coil (this is to ensure air flow is not be reduced within unit)
 - e. (Optional) UV C Lamps to shine on HEPA Filter
 - f. (Optional) Hinged filter door with glass view port for filter door
4. Unitary
5. Air Handling
6. Air Terminal Devices and Heating
7. DDC Controls
8. Cooling towers and chillers
9. Pumps
10. Invertors
11. Boilers
12. Water Heaters

2. Type of Bid

AEPA requests Bidders to submit primary pricing in the form of either “catalog pricing,” or “line-item pricing.” This category is constructed in the form checked below. An explanation of each can be found in the table below. Additional information on permissible pricing strategies can be found in Part A – General Terms and Conditions under “Pricing.”

This bid is considered a:

YES	NO	TYPE OF BID
X		<p>CATALOG: A catalog bid is utilized when the products and/or services solicited are clearly identified with set and specific characteristics, attributes and configurations that are identifiable as a stand-alone single unit and can be listed and priced as a single unit with options that can be added to enhance and/or improve its operation and functionality. The Bidder offers a fixed discount(s) off retail price or prices in a Commercially Available Catalog. The discounts may be for the entire Commercially Available Catalog, for specific products, product lines, manufacturers or category of products as determined by the Bidder. See Pricing section for detailed information on Catalog Pricing.</p>
	X	<p>LINE ITEM: A line-item bid is utilized when the products and services solicited cannot be identified or listed as a single unit; consists of a number of different variables and configurations, it is necessary to identify the specific project or application; the end product or solution is made of individually priced elements or components and the end product’s or solution’s cost is derived by the Vendor Partner specially prepared and providing a quote based on the project’s terms, conditions and requirements. See Pricing section for detailed information on Line-Item Pricing.</p>

3. Anticipated AEPA Member Agency Participation

State	Participate? Yes/No/ Undecided	Other States Member Sells In
California	Yes	AZ, NV
Colorado	Yes	
Connecticut	Yes	MA, ME, NH, NY, RI, VT
Florida	Yes	AL
Georgia	Yes	
Illinois	No	
Indiana	Yes	
Iowa	Yes	IL, SD
Kansas	Yes	OK
Kentucky	Yes	AL, LA, MS, NC, TN, WV
Massachusetts	No	
Michigan	Yes	
Minnesota	Yes	SD
Missouri	Yes	AR, IL, LA, SD
Montana	Yes	ID
Nebraska	Yes	
New Jersey	No	
New Mexico	Yes	
North Dakota	Yes	
Ohio	Yes	
Oregon	Yes	
Pennsylvania	Yes	DE, HA, MD, NY
South Carolina	Yes	
Texas	Yes	
Virginia	Yes	
Washington	No	AK, ID, OR, MT
West Virginia	Yes	
Wisconsin	Yes	
Wyoming	Yes	SD, UT
Total	22	

Please note that individual AEPA Member Agencies that have indicated that they intend to participate in any contract approved under this solicitation, does not guarantee or mean that the individual AEPA Member Agency will enter into a contract with any AEPA approved Vendor Partner. Each AEPA Member Agency will make that determination after reviewing Vendor Partner responses and AEPA's recommendation for acceptance and bid award. The AEPA Member Agency's contracting decision shall be final.

4. Anticipated Volume

HVAC and Mechanical Products and Solutions is a new category for AEPA. The resulting bid will be an Indefinite Delivery, Indefinite Quantity (IDIQ) contract(s). AEPA Member Agencies estimate approximately \$25-30 million in sales in the first contract term. AEPA Member Agencies anticipate that purchase volume will increase over contract years two (2) through four (4). This information is provided as an aid to Bidders in preparing responses only. It is not to be considered a guarantee of volume under this IFB. The successful Vendor Partner's discount and pricing schedule shall apply regardless of the volume of business under the contract.

5. Voluntary Pre-Bid Conference Call

AEPA will host a voluntary pre-bid conference call for any interested Bidders or potential Bidders. The conference call times are set in the following schedule for each of the four contiguous United States time

zones. No pre-registration will be required. Recording of the conference call will be posted on the AEPA Website.

Voluntary Pre-Bid Conference Call Schedule – May 11, 2021

IFB	Eastern	Central	Mountain	Pacific
21.75 - HVAC	11:00 AM	10:00 AM	9:00 AM	8:00 AM

Join Zoom Meeting

<https://us02web.zoom.us/j/81113497228?pwd=TDZ1SEpydk8veUJ2NGQxLORnY2kwQT09>

Meeting ID: 811 1349 7228

Passcode: 2MtbHd

Dial In

929 436 2866 OR 301 715 8592 Passcode: 356897

6. Glossary of Terms and Abbreviations

Abbreviations and Acronyms for Standards and Regulations: Where abbreviations and acronyms are used in specifications or other contract documents, they shall mean the recognized name of the organizations responsible for the standards and regulations in the following list. Names, telephone numbers, and websites are subject to change and are believed to be accurate and up to date as of the date of the contract documents.

7. Standard Specifications

Item	Description
7.1.1.	The Vendor Partner will have access to a full inventory of the awarded product line.
7.1.2.	The Vendor Partner shall maintain a minimum monthly overall average fill rate of 95% or above. Line items that are reordered, backordered, or partially filled are not considered filled line items when calculating this service level.
7.1.3.	Orders must be shipped within 48 hours after the estimated ship date given to the Buyer. The Vendor Partner will notify the Buyer if the product ordered cannot be shipped within this period to provide the opportunity to secure the product elsewhere.
7.1.4.	Vendor Partners must be a manufacturer’s authorized sales and service dealer for all proposed equipment/software. An authorized sales and service dealer is defined in this solicitation as one purchasing their products for reselling directly from the manufacturer(s) or the manufacturer’s approved channels. Products that result from new authorized sales and service dealer arrangements between the Vendor Partner and the manufacturer during the term of this contract may be added and offered through the AEPA contract.
7.1.5.	All charges and components necessary for the performance of the contract shall be identified even if such are not specifically addressed in any paragraph or sub-paragraph or form that is a part of this request.
7.1.6.	If the Vendor Partner intends to utilize independent agents/distributors, subcontractors, and/or third-party agents to perform and/or provide any part of the products and services offered herein, the Vendor Partner must identify all providers and all associated costs with these providers.
7.1.7.	Vendor Partners must provide a product or mix of products in a manner that will allow Buyers to migrate to emerging technologies/services and between legacy technologies with no penalty charge associated with maintaining the most appropriate selections of goods and services throughout the life of the contract.
7.1.8.	Packing slips shall accompany all deliveries and shall contain the Buyer’s purchase order number, vendor name, and name of the article. Cartons shall be identified by purchase order number and vendor name.
7.1.9.	Orders not filled and partials shall be indicated on the packing list. Vendor Partner shall inform members of the anticipated availability date for unfilled and partial orders.
7.1.10.	All products sold by the Vendor Partner must be new. Only the newest versions of software and equipment will be bid. Older versions will only be sold if specifically requested. Vendor Partner may offer reconditioned products as a Voluntary Alternate; such items shall be marketed and labeled as

Item	Description
	being reconditioned.
7.1.11.	Vendor Partner has the option to offer private label products. Vendor Partner shall maintain the same manufacturer specifications for private label products throughout the term of contract. Any change of manufacturers for a private label shall result in offerings equal to or superior to the originally approved manufacturer at a price equal to or lower than the original offering.
7.1.12.	If the Vendor Partner makes an error in pricing (typographical or photographic error, for example), the Buyer reserves the right to return the product. The Vendor Partner agrees to pay for cost of any returned product due to a pricing error.
7.1.13.	Vendor Partner shall provide a Safety Data Sheet (SDS) for all items sold, if required. A separate sheet shall be provided for each individual item when purchase is made.
7.1.14	All products will ship FOB Destination, freight prepaid and added to invoice. Freight will be quoted and provided to the Participating Agency prior to purchase order (PO) approval. The Vendor shall propose a flat rate for all orders that are less than \$50.00 regardless of where to be shipped in the continental United States.

8. Product | Category Specific Specifications

Item	Description
8.1.1.	All branded components, spare parts, application software, accessories and ancillary equipment supplied under this bid must conform to manufacturer specifications and must be of new manufacture and must be in current standard production.
8.1.2.	The vendor partner is responsible for ensuring that these items are operable and installed following the manufacturer's specifications.
8.1.3.	Systems for wireless downloads should provide for existing and emerging technologies.
8.1.4	Many states' statute requires workers to be paid prevailing wages when employed on public works projects and public building service maintenance contracts. It is the vendor partner's responsibility to be acquainted with and comply with State regulations regarding payment of prevailing wages.
8.1.5	All materials and installation shall conform to the current edition of the International Mechanical Code, Unified Building Code, HVAC Mechanical Code, Fire Code, and International Energy Code, as applicable.
8.1.6	Vendor partner's test instruments to have up-to-date and valid calibration documentation. Documentation must be provided upon request by the AEPA member or its members
8.1.7.	Services may be included and identified separately. Services offered must include clear descriptions of proposed services. Services may include, but are not limited to: <ul style="list-style-type: none"> • Startup & Commissioning Services - equipment startups, system checkouts, control verification, retro commissioning, M & V verifications, rebate auditing, and others • Indoor Air Quality assessments through the building automation system (BAS) and on-site assessments of the physical environment. • Service & Maintenance - preventative and full maintenance contracts, remote monitoring, annuals, emergency services, regulatory compliance, cleaning (i.e., duct, coils and filters), scheduled maintenance (i.e., oil, chemical and vibration analysis) and others • Installation and Turnkey Contracting • Warranty Services - Extended parts & labor (define maximum number of years available) • Energy Services - Energy Tracking, Energy Analysis and other services • Equipment Rentals - Chillers, pumps, transformers and other items • Professional Services - Engineering, Design, Drafting, Architectural, Project Management and others • Site Surveys

Installation | Testing | Maintenance

Item	Description
8.2.1	The installation and/or removal of equipment under contract HVAC and Mechanical Products and

Item	Description
	Solutions shall be performed professionally. The member's premises and equipment shall be left in a clean condition. The awarded vendor partner may be required to repair all damage and/or provide full compensation for damage to the member agencies' premises and equipment that occurred during installation/removal. It is preferred that all equipment that is removed from a member agency facility be recycled in an appropriate manner
8.2.2	Personnel in charge of the installation must be available to coordinate installation with the member agency's internal staff. Qualified service support and technical personnel will be required to provide all necessary maintenance and repair. Installation dates and installation schedules must be approved by the member agency.
8.2.3	Installation crews may be working around students, employees, teachers, and general staff. Installation may require off-hour and weekend work to accommodate and complete the project in the timeline required by the member agency. The member agency will try to accommodate access for installation during school/business hours; however, any plan that displaces staff, employees, students or personnel will most likely disrupt the ordinary daily schedule. If after hours and weekend installations are preferred by the member, this will be so identified in the proposal to the member agency.
8.2.4	Project Manager for the awarded vendor partner shall verify proper installation at multiple and various times throughout the installation
8.2.5	Upon successful completion of the installation, test system functionality for all possible scenarios and document all outcomes
8.2.6	<p>The Member Agency will evaluate the performance of newly installed HVAC and Mechanical Products and Solutions for 90 days after installation. If the performance is unsatisfactory, the member agency will immediately contact the awarded vendor partner to pursue corrective action and resolution of the problem. Resolution of performance problems may result in:</p> <ul style="list-style-type: none"> ○ Repair or other actions to correct the problem including training or modifications made to member's satisfaction. ○ The replacement of HVAC equipment or an alternative approach using equipment or software, of the same brand and model, at no additional cost (including delivery and installation) to the member agency (upon member's approval). ○ Return of the HVAC equipment or software, with the cancellation of the order at no charge to the member agency.
8.2.7	Inspections, tests, measurements, or other acts or functions performed by the member agency shall in no manner be construed as relieving the awarded vendor partner from full compliance with member states' requirements. At a minimum, an installed piece must demonstrate the capability of providing the functions and services specified in the manufacturer's published literature.
8.2.8	Maintenance, repair, and services related to the operation of the HVAC system, components, and equipment must be provided to the member agency. Vendor partners must have the ability to remotely access end-users' systems to help with diagnostics, upgrades, and general queries.
8.2.9	Service calls must be acknowledged within two (2) hours from the AEPA member agency call to the vendor partner.
8.2.10	Excessive Service and Downtime: HVAC and Mechanical Products and Solutions including all components, spare parts, application software, and ancillary equipment supplied through this contract shall be capable of continuous operation. Therefore, the vendor partner shall guarantee that all will be operational at least 98% of normal business hours. Equipment that develops a trend of requiring an excessive number of service calls shall be reported by the member agency to the awarded vendor partner or by the awarded vendor partner to the member agency as the situation warrants and corrective action and resolution will be made in a manner that is best for the member agency.
8.2.11	If the performance of maintenance services under the contract results in a need to replace defective parts, such items may only be replaced by new parts. In no instance shall the awarded vendor partner be permitted to replace defective items with refurbished, remanufactured, or surplus items without the prior written authorization of the member agency.
8.2.12	The vendor partner must guarantee the availability of repair parts for a minimum of five (5) years after member agencies acceptance of the contracted HVAC system or parts.
8.2.13	Member agencies shall be afforded the option to relocate/transfer contract HVAC and Mechanical Products and Solutions from one-member location to another member location as deemed

Item	Description
	necessary with no change to agreement or maintenance plans. If self-moves are an option, the awarded vendor partner must be notified before relocating or transferring. The member agency will be responsible for repairs required for damage that occurred during self-moves.
8.2.14	Alternately member agencies may elect to have the awarded vendor partner relocate/transfer the HVAC and Mechanical Products and Solutions. The awarded vendor partner is responsible for repairs required following such relocation/transfer. Relocation/transfer of HVAC and Mechanical Products and Solutions must be coordinated with the member agency contact person responsible for the contract.

9. Pricing

AEPA has identified and stipulated the type of bid and the pricing methodologies that are to be utilized to price and submit bid prices. The Vendor Partner agrees that the cost for any item bid or offered on this contract will be uniform for all states, and that any differences in pricing are due to state specific installation and labor costs, AEPA Member Agency's Administrative Fee, or other approved reasons. The Bidder must provide their pricing as requested utilizing the various pricing methodologies specified. **The Bidder/Vendor Partner must agree that they will offer prices equal to or better than what they ordinarily offer to individual entities or cooperatives with equal or lesser volume.** Please note the following that relate to pricing:

1. **Primary Pricing Strategies:** All Bidders will be required to submit "Primary Pricing" in the form of either "Catalog Pricing" or "Line-Item Pricing" or a combination of these two pricing strategies as defined in Part B, bid specifications. Bidders are also encouraged to offer OPTIONAL pricing strategies including "Hot List" and "Volume Discounts".
 - a. **Catalog Pricing:** Catalog pricing is utilized when the products and/or services solicited are clearly identified with set and specific characteristics, attributes and configurations that are identifiable as a stand-alone single unit and can be listed and priced as a single unit with options that can be added to enhance and/or improve its operation and functionality. The Bidder offers a fixed discount(s) off retail price, catalog price, published price or list price. The discounts may be for the entire commercially available catalog, for specific products, product lines, manufacturers or category of products as determined by the Bidder.
 - i. **Discounts:** Discount offers must clearly identify percent of discount to apply to a commercially available catalog, manufacturer, MSRP, retail or nationally published price lists. Bidders shall identify and stipulate if the discounts apply to the entire catalog/price list, specific product lines, manufacturers and/or categories of products. Bidder shall agree that there will be no reduction in discount(s) during the term of the contract.
 - ii. **New Catalogs/Price Changes:** New catalogs and corresponding nationally published price lists may be submitted throughout the term of the contract and shall be submitted to the AEPA Category Committee for review prior to release to all AEPA Member Agencies. Prices may change based on manufacturer's price changes, new published pricing or price lists, but the original discount bid shall remain firm for the duration of the contract.
 - iii. **Core List:** In a Catalog Priced bid, a category (i.e. office supplies) may include a "core list" which contains a selection of the most commonly used products/services with the expectation that a deeper discount would be bid for these items. If a new catalog and price list is published during the contract term, the original discounts shall be applied to the new published prices to establish the AEPA price for these core items.
 - iv. **Product Addition/Discontinuation:** New products, within the same scope of work, may be added at the established percentage discounts at any time. We encourage research and development of new innovative product technology that enhances efficiency while reducing cost. Discontinued products may be dropped at any time during the year. In the event a Core item is discontinued by the manufacturer during the term of the contract, Vendor Partner is required to add a functionally equivalent substitute at the same discount structure.

b. **Automated System for Pricing (ASP):** The method consisting of an ASP and/or software application (RSMMeans Facilities Construction Cost Book, use last column pricing "Total Incl O&P") that is self-contained and consists of a turn-key solution that includes a complete line-item listing of all of the products, supplies, materials, equipment, services, accessories and options with their description, specifications, terms, conditions and associated pricing for each item, sub-assemblies and/or assemblies. The Bidder provides a percent of discount or fixed multiplier/factor to be applied to total project cost to allow for individual state conditions and requirements and to arrive at the AEPA price.

2. **Secondary Pricing Methods (Catalog Bids only, see Part B for category designation):** Bidders are required to offer Customized Price Lists (Catalog Bids ONLY) and encouraged to offer Hot Lists and Volume Discounts as follows:

- a. **Customized Price List:** Bidders are required to offer customized price lists to Participating Entities for items within the Bidder's Commercially Available Catalog for Catalog Bids ONLY (not pertinent to Line Item Bids). Customized price lists shall be allowed under the following conditions:
- i. Items within the Vendor Partner's Commercially Available Catalog may be included on the customized price list providing they are not already on the Core Item list.
 - ii. Items are to be determined by the Participating Entity; Vendor Partner may object to up to ten (10) of the suggested items proposed by the customer and must offer substitutes until an agreement of the customized list is reached.
 - iii. Items on the customized price list shall be sold with an additional discount (deeper than what was originally bid on the non-core or catalog discount)
 - iv. Items may not include special order or customized service products unless agreed to by the Vendor Partner.
- b. **Volume Price Discounts:** Bidders are encouraged to offer additional pricing discounts that may be offered for a group of agencies in a local geographic area that desire to combine requirements (one-time purchase, or annual spend), i.e. local city, county, school district(s), etc. and/or for large one-time purchases. Additional volume price discounts are permissible under the following conditions: Discounts should be tiered and based on spend ranges as established by the Bidder on the Pricing Forms. Volume determination shall be determined between the Vendor Partner and the individual Buyers on a case-by-case basis.

3. Part F - Pricing Workbook

- a. Pricing shall be completed on the provided pricing sheets (Microsoft Excel Workbook) with the individual tables to be completed as follows:
- i. F.1 – Catalog Discount (Required)
 - ii. F.2 – Price Schedule (Required)
 - iii. F.3 – State Multiplier & Rates (Required)
 - iv. F.4 – Volume Discounts (Optional)
 - v. F.5 – Small Quote (Required)
 - vi. F.6 – Project Quote (Required)
- b. Bid pricing will be evaluated on a combination of the catalog price schedule and project quote. Pricing evaluation may include other considerations, including the total cost of the acquisition and whether the Proposer's offering represents the best value. See Evaluation, Approval, and Award in Part A – Terms and Conditions for additional information.

10. Evaluation

The AEPA Committee for this category will evaluate bid responses based on the entire response, and according to the criteria detailed in Part A for AEPA's definition of Responsive and Responsible bids. A recommendation may be made to recommend a single response or to recommend multiple bidders based on differentiation of product or service between bidders. AEPA will vote as a whole to accept or not accept a committee's recommendation. Once accepted, each recommended bid response will go to the individual states for contract approval. Please note, pricing evaluation may include other considerations, including the total cost of the acquisition and whether the Proposer's offering represents the best value. The evaluation committee may consider such factors as life-cycle costs, the total cost of ownership, quality, and the suitability of an offering in meeting AEPA members' needs.

Below is a summary was taken from the Evaluation section in Part A, F. Bid Evaluation, Approval, and Award:

Evaluation Criteria
Cost Evaluation
Complete Response to Bid
Conformance to Bid Terms and Conditions
Pricing Equal to or Better Than That Offered to Individual Entities or Cooperatives With Equal or Lesser Volume
Quality and Suitability of Products Offered
Marketing Plan
Financial Viability
Demonstrated Track Record of Performance in the Public Marketplace
Value Added attributes