

# REQUEST FOR PROPOSALS

## HVAC Preventive Maintenance and Controls Support Services

**Oxford Preparatory School**

**Issued:** February 23, 2026

**Proposal Due Date:** April 6, 2026 at 3:30 PM EST

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## 1. Introduction and Background

### 1.1 About Oxford Preparatory School

Oxford Preparatory School is an independent public charter school serving grades K-12 in Oxford, North Carolina. The school operates three primary facilities requiring comprehensive HVAC services:

- Lower School Campus (38,000 sq ft – Constructed in 2021)
- Upper School Campus (45,000 sq ft – Constructed in 2016)
- Athletic Fieldhouse (3,000 sq ft – Constructed in 2021)

### 1.2 Purpose of RFP

Oxford Preparatory School seeks qualified vendors to provide comprehensive HVAC preventive maintenance services for all three facilities and HVAC controls support/monitoring services for the Lower School and Athletic Fieldhouse. The school is seeking a qualified contractor to ensure optimal climate control, energy efficiency, and compliance with all applicable codes and regulations.

## 1.3 RFP Timeline

Activity	Date
RFP Issued	February 23, 2026
Pre-Proposal Site Visit	Contact daleevans@oxfordprep.org
Questions Due	March 18, 2026, at 5:00 PM
Answers Posted	March 24, 2026
Proposals Due	April 6, 2026, at 3:30 PM
Vendor Interviews (if needed)	April 13 & 14, 2026
Contract Award Notification	April 17, 2026
Contract Start Date	May 1, 2026

Table 1: RFP Timeline and Key Dates

## 1.4 Contact Information

All inquiries regarding this RFP should be directed to:

**Andrew Swanner**

Executive Director

Oxford Preparatory School

6041B Landis Rd.

Oxford, NC 27565

Email: swannerab@oxfordprep.org

Phone: (919)690-0360

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## 2. Scope of Services

### 2.1 HVAC Preventive Maintenance Services

The selected contractor shall provide comprehensive preventive maintenance services for all HVAC equipment at the following locations:

- Lower School Campus
- Upper School Campus
- Athletic Fieldhouse

#### 2.1.1 General Requirements

- Scheduled preventive maintenance visits on a quarterly basis (minimum)
- Comprehensive inspection, cleaning, and adjustment of all HVAC equipment

- Filter replacement quarterly (contractor to supply)
- Belts to be changed annually (contractor to supply)
- Clean condenser coil (contractor to supply cleaning materials)
- Detailed documentation of all services performed
- Emergency service response within specified timeframes
- Priority scheduling for school operations (minimal disruption during school hours)
- Coordination with school administration for access and scheduling

### **2.1.2 Equipment Coverage**

Preventive maintenance services shall include, but are not limited to:

- Rooftop HVAC units (RTUs)
- Split system air conditioning units
- Heat pumps
- Air handling units (AHUs)
- Exhaust fans and ventilation systems
- Ductwork inspection and cleaning (as needed)
- Thermostats and control systems
- Condensate drains and pans
- Refrigerant lines and connections
- All associated electrical components

### **2.1.3 Preventive Maintenance Tasks**

Each preventive maintenance visit shall include, at minimum:

#### **Cooling Season (Spring/Summer) Tasks:**

- Inspect and clean condenser coils
- Inspect and clean evaporator coils
- Check refrigerant charge and pressures
- Test compressor operation and amp draw
- Inspect and test capacitors and contactors
- Lubricate all motors and bearings
- Inspect and replace air filters
- Check and clean condensate drain lines
- Test thermostat operation and calibration
- Inspect electrical connections and tighten as needed
- Check fan belts and adjust tension
- Test safety controls and switches

- Measure and record temperature differentials
- Clean unit housing and exterior
- Document all findings and recommendations

#### **Heating Season (Fall/Winter) Tasks:**

- Inspect and test heat pump operation
- Check defrost cycle operation
- Test emergency/auxiliary heat operation
- Inspect heat exchangers (where applicable)
- Test gas valve and ignition systems (where applicable)
- Check flue and venting systems (where applicable)
- Verify proper airflow and static pressure
- Inspect and test limit switches
- All tasks listed under Cooling Season as applicable

### **2.1.4 Emergency Service Requirements**

- 24/7 emergency service availability
- Response time of 4 hours or less for emergency calls during school hours (7:00 AM - 5:00 PM, Monday-Friday)
- Response time of 8 hours or less for after-hours emergencies
- Priority response during extreme weather conditions
- Clear communication protocol for emergency situations

### **2.1.5 Reporting Requirements**

- Detailed service reports for each preventive maintenance visit
- Photographic documentation of significant findings
- Equipment inventory and condition assessment
- Recommendations for repairs or replacements
- Annual comprehensive report summarizing all services and equipment status
- Monthly summary reports (if requested)

## **2.2 HVAC Controls Support and Monitoring (Lower School and Athletic Fieldhouse Only)**

The selected contractor shall provide comprehensive controls support and monitoring services for the Lower School campus HVAC control system.

### **2.2.1 Control System Overview**

The Lower School currently operates a Trane Tracer SC+ building automation system controlling HVAC equipment throughout the facility.

### **2.2.2 Monitoring Services**

- 24/7 remote monitoring of all connected HVAC equipment
- Real-time alarm notification and response
- Proactive identification of equipment issues
- Temperature monitoring and trending
- Energy consumption tracking and reporting
- System performance analytics
- Automated reporting of system status

### **2.2.3 Controls Maintenance and Support**

- Quarterly on-site inspection of control system components
- Software updates and programming changes as needed
- Calibration of sensors and controllers
- Troubleshooting and repair of control system issues
- Integration of new equipment into control system
- User training and support for school staff
- Documentation of control system configuration and programming

### **2.2.4 Schedule Programming and Optimization**

- Programming of HVAC schedules to align with school calendar
- Seasonal adjustments and optimization
- Holiday and vacation scheduling
- Special event programming as requested
- Setback and recovery programming for energy efficiency
- Zone control optimization

### **2.2.5 Controls Reporting**

- Semiannual performance reports with energy usage data
- Alarm history and response documentation
- System uptime and reliability metrics
- Recommendations for system improvements
- Annual comprehensive controls system assessment

## **2.3 Additional Service Expectations**

- All work must comply with applicable local, state, and federal codes
- Contractor must maintain all necessary licenses and certifications
- Professional appearance and conduct when on school property

- Coordination with school administration for all service activities
  - Minimal disruption to educational activities
  - Proper cleanup after all service activities
  - Compliance with school safety and security protocols
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## **3. Proposal Requirements**

### **3.1 Proposal Format**

Proposals must include the following elements, but doesn't have to be organized in the following sections:

#### **Section 1: Cover Letter and Executive Summary**

- Cover letter on company letterhead
- Executive summary of proposed services
- Confirmation of understanding of scope
- Statement of interest and commitment

#### **Section 2: Company Qualifications and Experience**

- Company history and ownership structure
- Number of years in business
- Number of employees and technician qualifications
- Relevant licenses and certifications (EPA 608, NATE, etc.)
- Insurance coverage (general liability, workers' compensation, professional liability)
- Bonding capacity (if applicable)
- Financial stability and references

#### **Section 3: Experience with Educational Facilities**

- List of current and past K-12 school clients
- Description of services provided to each reference
- Length of relationship with each reference
- Contact information for each reference (name, title, phone, email)
- Any specific experience with charter schools or similar-sized facilities

#### **Section 4: Technical Approach**

- Detailed description of preventive maintenance approach and methodology
- Service frequency and scheduling procedures
- Emergency response procedures and protocols

- Quality assurance processes
- Safety procedures and training
- Environmental and sustainability practices

## **Section 5: Controls Expertise (for Lower School and Fieldhouse Controls Support)**

- Experience with [specify control system brand/type] systems
- Certifications and training in building automation systems
- Remote monitoring capabilities and platform
- Software and tools used for controls support
- Integration capabilities with existing systems

## **Section 6: Staffing Plan**

- Proposed account manager and contact information
- Lead technician(s) assigned to Oxford Preparatory School
- Technician certifications and experience
- Background check policy and procedures
- Training and continuing education programs
- Staffing backup and coverage plans

## **Section 7: Service Level Commitments**

- Proposed preventive maintenance visit schedule
- Emergency response time commitments
- Availability for after-hours and weekend service
- Communication protocols and reporting schedule
- Performance guarantees or warranties
- Customer service and support availability

## **Section 8: Pricing Proposal**

### **8.1 Preventive Maintenance Pricing**

<b>Service</b>	<b>Annual Cost</b>	<b>Notes</b>
Lower School PM (per visit x 4 visits)	\$	
Upper School PM (per visit x 4 visits)	\$	
Athletic Fieldhouse PM (per visit x 4 visits)	\$	
<b>Total Annual PM Cost</b>	\$	

Table 2: Annual Preventive Maintenance Pricing

**8.2 Controls Support Pricing (Lower School & Fieldhouse)**

<b>Service</b>	<b>Annual Cost</b>	<b>Notes</b>
24/7 Remote Monitoring	\$	
Quarterly On-Site Controls Inspection	\$	
Programming and Schedule Changes	\$	
Alarm Response and Management	\$	
<b>Total Annual Controls Cost</b>	\$	

Table 3: Annual Controls Support Pricing

**8.3 Additional Pricing Information**

- Hourly rate for repair work not covered under PM contract
- Emergency service call rate (after-hours)
- Parts markup percentage
- Refrigerant costs (per pound by type)
- Travel charges (if applicable)
- Any other fees or charges not listed above

**8.4 Pricing Terms**

- All pricing must be valid for 90 days from proposal due date
- Indicate any proposed price escalation for multi-year contracts
- Payment terms and schedule
- Invoicing procedures and requirements

**Section 9: Contract Terms and Conditions**

- Proposed contract length (1, 3, or 5 years)
- Termination clause and notice requirements
- Renewal options and procedures
- Price adjustment mechanisms (if multi-year)
- Performance guarantees or service level agreements
- Any deviations from standard terms in Section 6 of this RFP

**Section 10: Additional Information**

- Any value-added services or capabilities
- Technology platforms or customer portals

- Energy savings programs or rebate assistance
- Equipment replacement planning and budgeting support
- Any other information relevant to the proposal

## 4.2 Required Attachments

All proposals must include the following attachments:

1. Proof of current EPA 608 certification for all technicians
2. Copies of relevant business licenses
3. Certificate of Insurance (meeting requirements in Section 6.5)
4. Any manufacturer certifications or authorizations

## 5. Evaluation Criteria

### 5.1 Evaluation Process

Proposals will be evaluated by a selection committee consisting of Oxford Preparatory School administrators, facilities personnel, Board Facilities Committee. The school reserves the right to:

- Request clarifications or additional information from any proposer
- Conduct interviews with shortlisted vendors
- Conduct site visits to reference accounts
- Negotiate final contract terms with selected vendor
- Reject any or all proposals
- Waive minor irregularities in proposals

### 5.2 Evaluation Criteria and Weights

Proposals will be evaluated based on the following criteria:

<b>Evaluation Criteria</b>	<b>Weight</b>
Company Qualifications and Experience	20%
K-12 Education Experience and References	20%
Technical Approach and Service Plan	20%
Staffing Qualifications and Stability	15%
Controls System Expertise (Lower School)	10%
Pricing and Value	15%
<b>Total</b>	<b>100%</b>

Table 4: Proposal Evaluation Criteria

## **5.3 Detailed Evaluation Factors**

### **Company Qualifications and Experience (20%)**

- Years in business and financial stability
- Size and capacity of organization
- Relevant licenses, certifications, and authorizations
- Insurance coverage adequacy
- Overall reputation and industry standing

### **K-12 Education Experience and References (20%)**

- Number and quality of school district or charter school clients
- Length of relationships with education clients
- Reference feedback and recommendations
- Understanding of school operational requirements
- Experience with similar facility sizes and complexity

### **Technical Approach and Service Plan (20%)**

- Comprehensiveness of preventive maintenance program
- Quality assurance and documentation procedures
- Emergency response capabilities and protocols
- Innovation and best practices
- Commitment to service quality and continuous improvement

### **Staffing Qualifications and Stability (15%)**

- Qualifications and certifications of assigned personnel
- Technician experience and training programs
- Account management structure and support
- Staff retention and turnover rates
- Background check procedures and compliance

### **Controls System Expertise (10%)**

- Experience with specific control system platform
- Remote monitoring capabilities and reliability
- Programming and troubleshooting expertise
- Integration and upgrade capabilities
- Reporting and analytics tools

## Pricing and Value (15%)

- Competitiveness of pricing
- Value for services provided
- Clarity and completeness of pricing
- Payment terms and flexibility
- Long-term cost predictability

**Note:** Price is not the sole determining factor. Oxford Preparatory School will select the vendor that provides the best overall value considering all evaluation criteria.

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## 6. Terms and Conditions

### 6.1 Contract Term

The initial contract term will be for **one (1) year** with an effective date of May 1, 2026. The school may elect to renew the contract for up to four (4) additional one-year terms upon mutual agreement and satisfactory performance.

### 6.2 Termination

Either party may terminate the agreement with **sixty (60) days** written notice. The school reserves the right to terminate immediately for cause, including but not limited to:

- Material breach of contract terms
- Failure to perform services as specified
- Violation of school policies or safety requirements
- Loss of required licenses or insurance coverage

### 6.3 Payment Terms

- Preventive maintenance services may be invoiced quarterly in advance or upon completion of each visit
- Controls support services may be invoiced monthly or quarterly as agreed
- Repair work will be invoiced separately with appropriate documentation
- Payment terms: Net 30 days from receipt of invoice
- All invoices must include detailed breakdown of services performed

### 6.4 Warranty

The contractor warrants that all services will be performed in a professional and workmanlike manner consistent with industry standards. All parts and materials shall be new and carry manufacturer warranties as applicable.

## **6.5 Insurance Requirements**

The selected contractor must maintain the following minimum insurance coverage throughout the contract term:

- General Liability Insurance: \$2,000,000 aggregate / \$1,000,000 per occurrence
- Workers' Compensation Insurance: Statutory limits for North Carolina
- Commercial Automobile Liability: \$1,000,000 combined single limit
- Professional Liability/Errors & Omissions: \$1,000,000 per claim

Oxford Preparatory School must be named as an additional insured on the general liability policy.

## **6.6 Licensing and Permits**

The contractor must maintain all licenses required by state and local authorities, including:

- North Carolina HVAC Contractor License
- EPA Section 608 Certification (all technicians handling refrigerants)
- Any additional trade-specific licenses or certifications

All work must be performed in compliance with applicable building codes, safety standards, and environmental regulations.

## **6.7 Indemnification**

The contractor agrees to indemnify, defend, and hold harmless Oxford Preparatory School, its board members, officers, employees, and agents from any and all claims, damages, losses, and expenses arising out of or resulting from the contractor's performance under this agreement.

## **6.8 Independent Contractor**

The contractor is an independent contractor and not an employee of Oxford Preparatory School. The contractor is responsible for all payroll taxes, benefits, and employment-related obligations for its personnel.

## **6.9 Ownership of Documents**

All reports, documentation, and work product created under this contract shall become the property of Oxford Preparatory School.

## **6.10 Assignment**

The contractor may not assign or subcontract this agreement without prior written approval from Oxford Preparatory School.

## **6.11 Modification**

Any modifications to the contract must be made in writing and signed by authorized representatives of both parties.

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## **7. Submission Instructions**

### **7.1 Proposal Deadline**

Proposals must be received no later than **April 6, 2026 at 3:30 PM EST**. Late proposals will not be accepted.

### **7.2 Submission Method**

Submit proposals in the following manner:

#### **Electronic Submission (Preferred):**

Electronic proposals may be submitted via **[email to swannerab@oxfordprep.org](mailto:swannerab@oxfordprep.org)** with the subject line: "HVAC Services RFP Proposal - [Company Name]". PDF format is required. Maximum file size: 25 MB.

### **7.3 Questions and Clarifications**

All questions regarding this RFP must be submitted in writing via email to [swannerab@oxfordprep.org](mailto:swannerab@oxfordprep.org) no later than **March 18, 2026 at 5:00 PM EST**.

Questions and answers will be compiled and distributed to all known interested parties by **March 24, 2026**.

### **7.4 Addenda**

If any changes or clarifications to this RFP are necessary, written addenda will be issued to all known interested parties. Proposers must acknowledge receipt of all addenda in their proposal submission.

### **7.5 Proposal Withdrawal**

Proposals may be withdrawn by written request prior to the submission deadline. Proposals may not be withdrawn after the submission deadline without forfeiting any proposal bond (if required).

### **7.6 Public Records**

Proposals become the property of Oxford Preparatory School upon submission. As a North Carolina charter school, Oxford Preparatory School is subject to public records laws. Financial information and trade secrets may be protected from disclosure to the extent permitted by law if clearly marked as confidential.

### **7.7 Proposal Costs**

Oxford Preparatory School is not responsible for any costs incurred by proposers in preparing and submitting proposals.

### **7.8 Rights Reserved**

Oxford Preparatory School reserves the right to:

- Accept or reject any or all proposals

- Waive minor irregularities or technicalities
  - Request additional information or clarifications
  - Negotiate with one or more proposers
  - Cancel this RFP at any time
  - Award to other than the lowest price if in the school's best interest
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## **8. Appendices**

### **Appendix B: Proposal Checklist**

Use this checklist to ensure your proposal is complete before submission:

- Cover letter on company letterhead
  - Executive summary
  - Company qualifications and experience section
  - Minimum of three (3) K-12 education references
  - Technical approach and methodology
  - Controls system expertise documentation
  - Staffing plan with technician qualifications
  - Service level commitments
  - Complete pricing proposal (all sections)
  - Proposed contract terms
  - EPA 608 certification copies
  - Business license copies
  - Certificate of Insurance meeting minimum requirements
  - Proposal submitted on time (by April 6, 2026 at 3:30 PM)
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**END OF REQUEST FOR PROPOSALS**