# REQUEST FOR PROPOSALS

## Geothermal HVAC System

### Lease-to-Own with Full Maintenance

## Agra Public Schools

Agra, Oklahoma

**RFP Number: APS-2025-HVAC-001**

**RFP TIMELINE**

| | |
|---|---|
| **RFP Issue Date:** | November 20, 2025 |
| **Site Visit Date Range:** | December 1 – 5, 2025 |
| **Questions Due:** | December 7, 2025, 5:00 PM CST |
| **Proposal Due Date:** | December 15, 2025, 5:00 PM CST |
| Anticipated Interview Dates (if needed): | Jan 2 – 9, 2026 |
| Anticipated Award Date: | January 17, 2026 |
| Anticipated Contract Start Date: | TBD Pending Project Funding |

# 1. INTRODUCTION AND BACKGROUND

## 1.1 Purpose

Agra Public Schools (APS) is seeking proposals from qualified contractors to provide, install, own, and lease (lease-to-own) a complete geothermal ground-source heat pump (GSHP) HVAC system. The selected contractor will be responsible for all aspects including design, engineering, equipment procurement, installation, commissioning, maintenance, and operation under a 10-year lease purchase agreement.

## 1.2 About Agra Public Schools

APS serves approximately 300 students across multiple buildings in Agra, Oklahoma. The District is committed to sustainability, energy efficiency, and providing comfortable learning environments.

## 1.3 Current Situation

- Current annual energy cost (HS & Gym): $31,200
- Current Energy Use Intensity (EUI): 43 kBTU/sf/year
- Current utility spend per student: $263

## 1.4 Project Overview

The project involves installation of approximately 82 tons of geothermal HVAC at the High School, 90 tons at the High School Gym, 90 tons at the elementary school and 90 tons at the elementary school gym for a total of 352 tons of HVAC capacity. This RFP seeks proposals where a guaranteed annual net savings of at least $10,000 per year would be realized by the school / district. The District will evaluate proposals in part based on proposer-provided projections of EUI, annual savings and cost per student.

## 1.5 Procurement Method

This procurement is conducted in accordance with 2 CFR Part 200 - Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. This is a competitive Request for Proposals seeking best value for the District.

# 2. SCOPE OF WORK

## 2.1 Pre-Installation Phase Requirements

- Site assessments and surveys
- Geothermal loop field design and engineering
- HVAC system design and load calculations
- Building automation system (BAS) integration design
- Obtain all necessary permits and approvals
- Provide detailed installation schedule
- Coordinate with District staff on building access

## 2.2 Installation Phase Requirements

- Drilling and installation of geothermal well field (approx. 4,920 linear feet)
- Installation of ground loop piping and headers
- Pump station construction
- HVAC equipment installation (appx. 352 tons total capacity)
- Ductwork modifications as needed
- Building automation system installation
- Controls and thermostats installation

- System commissioning and testing
- Staff training on system operation
- Site restoration (grading, seeding, sodding)

### 2.3 Lease-to-Own Lease Period Responsibilities (10 Years)

- Maintain ownership of all equipment
- Provide comprehensive maintenance and service
- Emergency repairs (24/7 availability, 4-hour response time)
- Preventive maintenance (quarterly minimum)
- Filter changes (quarterly or as needed)
- Equipment inspection and tune-ups
- Ground loop monitoring and maintenance
- BAS monitoring and maintenance
- Annual performance reporting
- Energy savings verification and guarantee administration
- Parts and labor for all repairs
- Equipment replacement if needed

### 2.4 Performance Standards

- Equipment shall be new, current model year
- Minimum COP (Coefficient of Performance) of 5.0 for heating
- Minimum EER (Energy Efficiency Ratio) of 25 for cooling
- System shall achieve target EUI of 43 kBTU/sf/year or better
- All work complies with applicable codes and standards

### 2.5 Energy Savings Guarantee

The Contractor shall guarantee minimum annual energy savings as specified in their proposal. If actual savings fall short, the Contractor shall make up the difference through lease purchase payment reductions or direct payments to the School / District.

### 2.6 Project Timeline

This project is contingent upon award and receipt of external grant funding. The district requests that proposers submit a detailed construction schedule beginning upon district issuance of notice to proceed (following funding confirmation).

### 2.7 Match Funding from Proposers

Proposers are encouraged, but not required, to offer cost-sharing, in-kind services, or match funding contributions to support grant application efforts or otherwise reduce project costs. Proposals offering such support may receive favorable consideration, but it is not a mandatory requirement.

#### 2.8 Mandatory Site Visit and Assessment

Each prospective proposer MUST conduct a site visit before submitting a proposal. Site visits must be scheduled between December 1, 2025 and December 5, 2025. To schedule: Contact Jeff Kelly at Jkelly@agra.k12.ok.us at least 48 hours in advance. Proposers are encouraged to recommend scope modifications, alternative technologies, or additional measures that would enhance project value or address facility needs identified during the site assessment.

## 3. PROCUREMENT REQUIREMENTS (2 CFR 200)

### 3.1 Compliance Statement

This procurement is conducted in accordance with 2 CFR 200.318 through 200.327. All proposals must comply with applicable federal, state, and local requirements.

### 3.2 Competition Requirements (2 CFR 200.319)

Full and open competition is provided to all responsible proposers. No unreasonable requirements are placed on firms to qualify. The solicitation does not contain features that unduly restrict competition.

### 3.3 Procurement Method (2 CFR 200.320)

This procurement uses the competitive proposals method, appropriate for acquisitions exceeding $250,000 where price is not the sole determining factor.

### 3.4 Small and Minority Business Participation

APS encourages participation by small businesses, minority-owned firms, women's business enterprises, and labor surplus area firms. Proposers shall identify their status.

### 3.5 Required Contract Provisions

The resulting contract will include all provisions required by 2 CFR 200.326 and Appendix II, including termination provisions, Equal Employment Opportunity compliance, Davis-Bacon Act compliance (if applicable), debarment certification, and Byrd Anti-Lobbying Amendment compliance.

## 4. PROPOSAL REQUIREMENTS

### 4.1 Mandatory Proposal Components

All proposals must include the following. Failure to include any mandatory item may result in proposal rejection:

### A. Executive Summary (2 pages maximum)

- Company overview
- Understanding of project objectives
- Why your firm is best qualified
- Key differentiators

### B. Company Qualifications and Experience

- Company history and ownership structure
- Years in business
- Geothermal HVAC experience (minimum 5 years required)
- Oklahoma K-12 school experience
- Financial stability documentation
- Bonding capacity and insurance certificates
- Licenses and certifications
- Small/minority business status (if applicable)

### C. Project Team

- Organizational chart for this project
- Key personnel resumes
- Subcontractor information
- Staff qualifications and certifications

## D. Relevant Project Experience

Provide a minimum of 3 references from current or past clients for similar projects (geothermal HVAC in schools on multi-year lease purchase agreements). For each reference include: reference name, school name, and contact information (email and phone), project location and date of installation, system size (tons), contract value, project description, actual energy savings achieved, and photos.

## E. Technical Approach

- Project understanding and methodology
- Geothermal system design approach
- Equipment specifications and manufacturers
- Installation methodology
- Quality assurance/quality control procedures
- Commissioning plan
- Safety plan

## F. Project Schedule

Provide detailed timeline from contract award through commissioning, including critical path items and coordination with school calendar.

## G. Maintenance and Service Plan

- Preventive maintenance schedule and procedures
- Response time for emergency calls
- Parts inventory and supply chain management
- 24/7 technician availability plan
- Annual inspection and reporting procedures
- System monitoring approach

## H. Energy Savings Guarantee

- Guaranteed annual energy savings (dollar amount)
- Baseline assumptions
- Measurement and verification methodology
- True-up provisions if savings not achieved

## I. Lease Purchase Structure and Pricing (Use Appendix A Pricing Form)

- Total project cost breakdown
- Monthly lease purchase payment (all-inclusive)
- Confirmation of inclusions (maintenance, repairs, parts, monitoring)
- Escalation clauses (if any)
- Payment terms
- End-of-lease purchase ownership transfer terms

## J. Financial Capacity

- Recent financial statements (2 most recent years)
- Bank reference letter
- Surety bond capacity letter

## K. Required Certifications (Appendix B)

- Debarment and suspension certification
- Lobbying certification
- Conflict of interest disclosure

- Insurance certificates
- Tax compliance certification

### 4.2 Proposal Format Requirements

- 8.5" x 11" paper
- Minimum 11-point font for body text
- Sequential page numbering
- Submit: One (1) electronic PDF via email. If the file is too large, it may be divided into two or more parts that are clearly labeled “Part 1”, “Part 2”, etc.
- Proposals shall not exceed 75 pages (excluding appendices and forms)

# 5. EVALUATION CRITERIA

## 5.1 Evaluation Criteria and Points

Proposals will be evaluated using the following criteria:

| Evaluation Criteria | Points | Description |
|---|---|---|
| Company Qualifications, Team & Experience | 20 | Years in business, geothermal expertise, OK school experience |
| References & Past Performance | 10 | Client feedback, documented energy savings |
| Technical Approach & Methodology, Project Schedule | 25 | System design, equipment quality, installation plan |
| Maintenance & Service Plan | 15 | Preventive maintenance schedule, response times, 24/7 availability |
| Energy Savings Guarantee | 15 | Guaranteed savings amount, measurement plan, true-up provisions |
| Cost & Lease Terms | 15 | Monthly payment, all-inclusive terms, value for money |
| **SUBTOTAL POINTS** | **100** | |
| Cost-sharing / Match funding (bonus) | ~5 | Financial contributions, in-kind services, or resources that reduce project costs or support grant applications |
| **TOTAL POINTS POSSIBLE** | **105** | |

**Minimum Qualification Threshold:** Proposals must score at least 70 points to be considered for award.

**Award Basis:** Award will be made to the responsible proposer whose proposal is most advantageous to APS, considering price and other factors.

# 6. SUBMISSION INSTRUCTIONS

### 6.1 Questions and Clarifications

Questions must be submitted in writing via email to jkelly@agra.k12.ok.us no later than December 7, 2025, 5:00 PM CST. To receive notification of any amendments to the RFP and

answers to questions posed, send an email to jkelly@agra.k12.ok.us with the subject line: “Notifications re: RFP APS-2025-HVAC-001”. Upon receipt of this email your email address will be added to a Notifications List to receive any amendments or Q&A updates. Notifications of any amendments or Q&A updates will be sent to all bidders on the Notifications List.

### 6.2 Proposal Due Date and Delivery

Proposals are due at or before December 15, 2025, 5:00 PM CST. Submit to: jkelly@agra.k12.ok.us, Late proposals will not be accepted.

### 6.3 Submission Requirements

Submit one (1) electronic copy of your proposal in PDF format, via email. If the file is too large, it may be divided into two or more parts that are clearly labeled “Part 1”, “Part 2”, etc.

## 7. TERMS AND CONDITIONS

### 7.1 Right to Reject

APS reserves the right to reject any or all proposals, waive technicalities, request clarifications, cancel this RFP, or extend any deadline.

### 7.2 Costs of Proposal Preparation

APS is not liable for any costs incurred by proposers in preparing and submitting proposals.

### 7.3 Ownership of Proposals

All materials submitted become the property of APS. Proposals become public records after contract award, subject to Oklahoma Open Records Act.

### 7.4 Insurance Requirements (Minimum)

- General Liability: $2,000,000 per occurrence
- Automobile Liability: $1,000,000 combined single limit
- Workers' Compensation: Statutory limits
- Professional Liability: $1,000,000 per claim

### 7.5 Bonds

- Performance Bond: 100% of contract value
- Payment Bond: 100% of contract value

# APPENDIX A: PRICING FORM

Complete all sections. The monthly lease purchase payment must be all-inclusive (equipment, installation, maintenance, service, parts, monitoring, reporting).

**COMPANY INFORMATION**

Company Name: _____

Contact Person: _____

Email: _____ Phone: _____

| Cost Component | Amount |
|---|---|
| Total Project Installation Cost | $ |
| Monthly Lease Purchase Payment (all-inclusive, 10-year term) | $ |
| Guaranteed Annual Energy Savings | $ |
| Cash Match or In-kind Contribution | $ |

**Confirm monthly payment includes:**

☐ Equipment ownership by Contractor
☐ All preventive maintenance
☐ All repairs (parts and labor)
☐ All filter changes
☐ Emergency service (24/7)
☐ BAS monitoring and maintenance
☐ Annual performance reporting
☐ Equipment replacement if needed during lease purchase term

Authorized Signature: _____

Printed Name: _____

Title: _____

Date: _____

# APPENDIX B: REQUIRED CERTIFICATIONS

## CERTIFICATION REGARDING DEBARMENT AND SUSPENSION

The proposer certifies to the best of its knowledge and belief that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;
2. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public transaction;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity with commission of any offense enumerated above; and
4. Have not within a three-year period preceding this proposal had one or more public transactions terminated for cause or default.

Company Name: _____

Authorized Signature: _____

Printed Name: _____

Title: _____

Date: _____

## CERTIFICATION REGARDING LOBBYING

The undersigned certifies, to the best of his or her knowledge and belief, that:

No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract or grant.

If any funds other than federal appropriated funds have been paid or will be paid to any person for such purposes, the undersigned shall complete and submit Standard Form-LLL, 'Disclosure Form to Report Lobbying.'

Company Name: _____

Authorized Signature: _____

Printed Name: _____

Title: _____

Date: _____