REQUEST FOR PROPOSALS

Education & General (E&G) Facilities HVAC Preventive Maintenance and Repair Services

RFP No. USAO-FAC-RFP-2026-02

Issuing Institution	University of Science and Arts of Oklahoma (USAO)
Document Title	Education & General (E&G) Facilities HVAC Preventive Maintenance and Repair Services
RFP Number	USAO-FAC-RFP-2026-02
Issue Date	July 6, 2026
Proposal Deadline	July 27, 2026, at 2:00 PM CDT
Mandatory Pre-Proposal Conference	July 13, 2026, at 10:00 AM CDT — USAO Business Office, Troutt Hall, Room 220
Issuing Office	USAO Business Office
Owner's Representative	David Smith, Executive Director of Operations & Controller — dsmith2@usao.edu
Service Locations	USAO main campus academic and administrative buildings; 1727 W. Alabama Ave., Chickasha, OK 73018
Contract Type	Firm fixed-price preventive maintenance with time-and-materials repair services; initial term October 1, 2026 – June 30, 2027, with up to four one-year renewal options (July 1 – June 30) aligned to the University's fiscal year
Submission Method	Via the USAO vendor bid opportunity portal: https://usao.edu/vendors/index.html

IMPORTANT NOTICE

This document constitutes a Request for Proposals (RFP) from qualified firms and is not an offer to contract. Attendance at the pre-proposal conference is mandatory; proposals will not be accepted from firms that do not attend. USAO reserves the right to reject any or all proposals, to waive informalities, and to award in the manner deemed to be in the best interest of the University. All costs of proposal preparation are the responsibility of the offeror.

SECTION 1 — SCHEDULE OF EVENTS

The following schedule governs this RFP. Dates are subject to change by addendum.

Activity	Date
RFP available to prospective offerors	July 6, 2026
Mandatory pre-proposal conference (on site)	July 13, 2026, 10:00 AM CDT
Written questions due to the University by 5:00 PM CDT	July 16, 2026
University answers / addenda available	July 20, 2026
Proposals due to the University by 2:00 PM CDT	July 27, 2026
Contract selection (Board of Regents meeting)	September 10, 2026
Contract execution and commencement	October 1, 2026

The pre-proposal conference will convene at the USAO Business Office, Troutt Hall, Room 220, 1727 W. Alabama Ave., Chickasha, OK 73018, and will include a walk-through of the covered buildings and mechanical spaces.

SECTION 2 — PURPOSE AND SCOPE

2.1 Purpose

The University of Science and Arts of Oklahoma (USAO) seeks proposals from qualified, licensed mechanical contractors to provide comprehensive preventive maintenance and repair services for the HVAC systems serving the University's Education & General (E&G) facilities: the Student Center (including the Bookstore), Gary Hall, Canning Hall, Nash Library, the Music Annex, the Art Annex, Drover Fieldhouse, Te Ata Memorial Auditorium, the President's House, and the Alumni House.

The resulting contract will consist of (a) a firm fixed price for the scheduled preventive maintenance program described below, and (b) repair services performed on a time-and-materials basis at the rates proposed on Attachment 2. The initial term runs October 1, 2026 through June 30, 2027 to align with the University's fiscal year, renewable by mutual written agreement for up to four (4) additional one-year terms running July 1 through June 30.

2.2 Scope of Services — Preventive Maintenance

The Contractor shall furnish all labor, tools, equipment, transportation, filters, belts, lubricants, and incidental materials necessary to perform the following on all equipment listed in Appendix A, in accordance with manufacturer recommendations and accepted industry standards (ASHRAE/ACCA/SMACNA):

- Quarterly preventive maintenance inspections of all Appendix A equipment, including: filter inspection and replacement; belt inspection, adjustment, and replacement; lubrication of bearings and motors; inspection and clearing of condensate drains, pans, and pumps; inspection of coils; tightening and inspection of electrical connections, contactors, and controls; verification of thermostat/control operation; and verification of refrigerant charge with leak inspection.
- Annual cleaning of condenser and evaporator coils on all units.

- Pre-heating-season combustion analysis, heat-exchanger inspection, and safety/limit control testing on all gas-fired equipment.
- Filters, belts, and lubricants shall be furnished by the Contractor and are included in the annual preventive maintenance price.
- Written service report for each visit, delivered to the Owner's Representative within five (5) business days, documenting work performed, deficiencies found, and recommended repairs.
- Maintenance of a service log for each building and an annual condition report with prioritized repair and replacement recommendations.
- Refrigerant management, recovery, and record-keeping in accordance with EPA Section 608 and 40 CFR Part 82.
- Seasonal start-up (spring) and shutdown/winterization (fall) of the chilled-water systems at Gary Hall (60-ton Carrier chiller) and Nash Library (100-ton Carrier chiller), including chilled-water, heating-water, and condensate pumps.
- Annual pre-season service of the gas heating-water boilers at Gary Hall and Nash Library, including combustion analysis, safety-control testing, and water treatment verification.
- Maintenance of the SEMCO heat recovery units at the Student Center, including wheel media inspection and cleaning and drive and seal inspection.
- Maintenance of the Nash Library air handling units, fan-powered terminal units (35), and return and exhaust fans.
- Maintenance of the AAON make-up air units and rooftop units at Drover Fieldhouse and the steam-heat split systems at Te Ata Memorial Auditorium.

2.3 Scope of Services — Repair and Emergency Services

- Repair services shall be performed on a time-and-materials basis at the rates proposed on Attachment 2.
- Repairs estimated to exceed $1,000 require the Owner's written authorization before work proceeds, except emergency work necessary to protect life or property.
- Emergency service shall be available twenty-four (24) hours per day, seven (7) days per week, year-round. For emergencies (including total loss of heating or cooling in an occupied building, or conditions threatening life or property), a qualified technician shall be on site within four (4) hours of notification.
- Routine (non-emergency) service calls shall be responded to by the next business day.
- Parts and materials shall be invoiced at Contractor's documented cost plus the markup percentage proposed on Attachment 2; documentation shall be provided with each invoice.

2.4 Site-Specific Requirements

- All covered buildings are occupied academic, administrative, or auxiliary facilities. Work that is disruptive (noise, outages, odors) shall be scheduled around class, event, and library schedules in coordination with the Owner's Representative.
- Contractor personnel shall be uniformed, carry photo identification, and check in with Facilities Management upon arrival on campus.
- Loss of cooling during summer months and loss of heating during winter months in occupied buildings shall be treated as emergencies under Section 2.3.
- Chiller and boiler seasonal changeover dates shall be coordinated with the University's academic calendar.

- The President's House and Alumni House are residential/hospitality facilities; work shall be scheduled in advance with the Owner's Representative.

2.5 Exclusions

The following are excluded from the fixed annual price and, where applicable, will be handled as separately quoted projects: replacement of complete units or major components (compressors, heat exchangers, coils), building automation system upgrades or replacement, duct cleaning, and code-required capital improvements. The Contractor shall identify such needs in writing as they are discovered.

SECTION 3 — COVERED BUILDINGS AND EQUIPMENT

3.1 Covered Buildings

This contract covers the HVAC systems serving the following buildings:

Building	Primary Systems
Student Center	Rooftop units with gas heat, SEMCO heat recovery units, split systems, cooling-only units; Bookstore rooftop units and vertical split system
Gary Hall	60-ton Carrier chiller, gas heating-water boiler, chilled/heating-water and condensate pumps, six (6) Magic Aire air handling units, nine (9) exhaust fans
Canning Hall	Eight (8) Lennox split systems with gas heat, two (2) cooling-only split systems, eight (8) inline supply fans, four (4) exhaust fans
Nash Library	100-ton Carrier chiller with pump, gas heating-water boiler with pump, three (3) air handling units, thirty-five (35) fan-powered terminal units, return and exhaust fans
Music Annex	Mitsubishi split-system heat pump with electric heat and humidifier
Art Annex	Six (6) Lennox horizontal split systems with gas heat, nine (9) exhaust fans
Drover Fieldhouse	Two (2) AAON 40-ton make-up air units (DX with gas heat), five (5) rooftop units with gas heat
Te Ata Memorial Auditorium	Two (2) York 25-ton split systems with steam heat
President's House	Two (2) Lennox 4-ton split systems with gas heat
Alumni House	Two (2) Lennox 3-ton split systems with gas heat

3.2 Equipment Inventory

A detailed equipment inventory is provided in Appendix A. The inventory is believed to be substantially accurate but is provided for the offeror's convenience only. Offerors are responsible for verifying equipment counts, types, and conditions during the mandatory pre-proposal conference

walk-through. Discrepancies discovered after award shall not relieve the Contractor of the obligation to maintain all HVAC equipment serving the covered buildings at the contracted price.

3.3 Site Conditions

The covered buildings operate year-round on an academic schedule, with peak occupancy during the fall and spring semesters and heavy event use of the Student Center, Te Ata Memorial Auditorium, and Drover Fieldhouse. Mechanical rooms, rooftops, and equipment locations will be shown during the mandatory pre-proposal conference walk-through.

SECTION 4 — CONTRACTOR QUALIFICATIONS

4.1 Certifications and Licensing

The Contractor shall hold a current Oklahoma mechanical contractor license issued by the Oklahoma Construction Industries Board and shall maintain it throughout the contract term. All technicians performing refrigerant-related work shall hold current EPA Section 608 certification (Universal preferred).

4.2 Experience

The Contractor shall have a minimum of five (5) years documented experience maintaining commercial or institutional HVAC systems of the types covered by this contract, including water-cooled and air-cooled chillers, gas heating-water boilers, air handling units with fan-powered terminal units, energy recovery equipment, rooftop units, and split systems. Higher-education or K-12 campus experience is preferred.

4.3 Personnel

The Contractor shall assign a dedicated account manager and qualified service technicians to this contract, including at least one technician experienced with chiller and boiler plant operation and maintenance. All personnel shall be uniformed and shall carry photo identification while on campus.

4.4 References

A minimum of three (3) references from comparable commercial or institutional HVAC maintenance contracts must be submitted using Attachment 3.

SECTION 5 — CONTRACT TERMS

5.1 Term and Renewal

The initial contract term runs October 1, 2026 through June 30, 2027, aligning the contract with the University's July 1 – June 30 fiscal year. The contract may be renewed by mutual written agreement for up to four (4) additional one-year terms, each running July 1 through June 30. Price adjustments at renewal shall not exceed the lesser of three percent (3%) or the change in the CPI-U for the preceding twelve months.

5.2 Payment Terms

The annual preventive maintenance price shall be invoiced in equal quarterly installments in arrears following completion of each quarter's scheduled maintenance. Repair services shall be invoiced

upon completion. Payment shall be made within forty-five (45) days of receipt of a valid invoice. USAO is exempt from State Sales Tax and Federal Excise Tax; do not include taxes in pricing.

5.3 Governing Law and Venue

The resulting contract shall be governed by the laws of the State of Oklahoma. Any legal action shall be filed in a court of competent jurisdiction in the State of Oklahoma.

5.4 Hold Harmless

Contractor shall indemnify and hold harmless the State of Oklahoma and the Board of Regents for Oklahoma Colleges (BROC), including USAO and its officers, employees, and agents, from and against all claims, damages, losses, and expenses, including attorneys' fees, arising out of or resulting from the Contractor's performance of the work, to the extent caused by the negligent acts or omissions of the Contractor, its subcontractors, or anyone for whose acts they may be liable.

5.5 Open Records

Documents submitted may be subject to disclosure under the Oklahoma Open Records Act. Pricing information is not considered proprietary and will not be withheld from disclosure.

5.6 Laws, Regulations, and Site Requirements

Contractor certifies compliance with 25 O.S. § 1313 (E-Verify) and that no employee or subcontractor assigned to this contract is a registered sex offender. Contractor shall comply with all applicable federal, state, and local laws, OSHA requirements, and EPA refrigerant-handling regulations (40 CFR Part 82). The campus is tobacco-free and drug-free; Contractor personnel shall observe all campus policies while on site.

5.7 Equal Employment Opportunity

Contractor agrees to comply with EEO and Affirmative Action requirements under Executive Order 11246 and all subsequent amendments and applicable regulations.

5.8 Bonds and Insurance

The Contractor shall maintain the insurance coverages set out in the Attachment 4 Insurance Supplement throughout the contract term and shall provide certificates of insurance prior to commencing work. No performance bond is required for this services contract.

5.9 Termination

USAO may terminate the contract for convenience upon thirty (30) days' written notice, or immediately for cause. The contract is subject to the availability of appropriated funds; non-appropriation shall entitle USAO to terminate without penalty. The Contractor shall be compensated for services satisfactorily performed through the date of termination.

SECTION 6 — PROPOSAL SUBMISSION

6.1 Submission Method

Proposals shall be submitted electronically through the USAO vendor bid opportunity portal at https://usao.edu/vendors/index.html, and must be received no later than the date and time shown in Section 1. Late proposals will not be accepted.

6.2 Required Attachments

- Attachment 1 — Proposal Cover Page
- Attachment 2 — Pricing (Annual Preventive Maintenance Price, Labor Rates, and Other Charges)
- Attachment 3 — References (minimum three)
- Attachment 4 — Proposal Response (maximum eight pages) and Insurance Supplement

6.3 Right to Reject

USAO reserves the right to reject any or all proposals without prior notice and without liability, and to waive all informalities.

6.4 Addenda and Interpretations

No oral interpretation of the meaning of this RFP will be made. Any interpretation or supplemental instruction will be issued by written addendum posted to the vendor portal. All addenda shall become part of the RFP and must be acknowledged on Attachment 1.

ATTACHMENT 1 — PROPOSAL COVER PAGE

Legal Name of Offeror: _____

Business Address: _____

City / State / ZIP: _____

Federal Employer ID (FEI): _____

Contact Name and Title: _____

Telephone: _____

Email: _____

Oklahoma Mechanical Contractor License No.: _____

Addenda Acknowledged (list numbers): _____

By submitting this Proposal, the Offeror certifies it has the authority to enter into the Contract pursuant to its organizational documents, that the prices proposed were arrived at independently without collusion, and that all statements in this Proposal are true and correct.

Authorized Signature: _____

Printed Name and Title: _____

Date: _____

Conflict of Interest

Describe, if any, all current personal, business, and/or governmental relationships between yourself or your family members and the University. If none, state “None.”

_____

Proposed Alternative Terms

Offerors may propose alternative and/or additional terms by attaching a separate Word document with tracked changes.

Export Control

Please indicate whether the Offeror’s Proposal includes a service and/or product that is export controlled: ☐ Yes ☐ No

ATTACHMENT 2 — PRICING

A. Preventive Maintenance Price

Enter a firm price for the full preventive maintenance program described in Section 2.2 for each building, for (1) the initial term of October 1, 2026 through June 30, 2027, and (2) a full renewal contract year (July 1 – June 30). Prices shall include all labor, filters, belts, lubricants, and incidental materials.

Building	Initial Term Price (10/1/26 – 6/30/27)	Annual Price (renewal years, 7/1 – 6/30)
Student Center (including Bookstore)	$	$
Gary Hall	$	$
Canning Hall	$	$
Nash Library	$	$
Music Annex	$	$
Art Annex	$	$
Drover Fieldhouse	$	$
Te Ata Memorial Auditorium	$	$
President's House	$	$
Alumni House	$	$

Total Initial Term Price (10/1/26 – 6/30/27): $ _____

Amount in words: _____ dollars (amount in words governs).

Total Annual Price (renewal years): $ _____

B. Labor Rates for Repair Services

The following fully burdened hourly rates will apply to repair work authorized under Section 2.3 and will remain firm for the initial contract term:

Labor Category	Regular Hours (M–F, 8 AM–5 PM)	After Hours / Weekend	Holiday / Emergency
Service Technician (per hour)	$	$	$
Apprentice / Helper (per hour)	$	$	$

C. Parts, Materials, and Other Charges

Item	Rate
Parts and materials markup (% over Contractor's documented cost)	%
Refrigerant R-410A (per lb, installed)	$
Refrigerant R-22 or substitute (per lb, installed)	$
Other refrigerant (specify): _____	$
Trip / service call charge, if any (per occurrence)	$

Repairs estimated to exceed $1,000 in total cost require the Owner's written authorization before work proceeds, except emergency work necessary to protect life or property.

ATTACHMENT 3 — REFERENCES

Minimum three (3) references required. All fields are required; incomplete references will not receive credit. References must reflect comparable commercial or institutional HVAC maintenance contracts.

Reference 1

Organization: _____

Contact Name and Title: _____

Telephone / Email: _____

Contract Description and Equipment Types: _____

Contract Dates and Annual Value: _____

Reference 2

Organization: _____

Contact Name and Title: _____

Telephone / Email: _____

Contract Description and Equipment Types: _____

Contract Dates and Annual Value: _____

Reference 3

Organization: _____

Contact Name and Title: _____

Telephone / Email: _____

Contract Description and Equipment Types: _____

Contract Dates and Annual Value: _____

ATTACHMENT 4 — PROPOSAL RESPONSE AND INSURANCE SUPPLEMENT

The Proposal Response shall not exceed eight (8) pages. Submissions exceeding this limit may be considered nonresponsive.

A. Executive Summary

Provide a concise executive summary of the services your firm proposes to perform.

B. Maintenance Program and Approach

Describe your preventive maintenance program for the equipment listed in Appendix A, including your inspection checklists, scheduling approach around the academic calendar, and your approach to chiller and boiler plant maintenance and seasonal changeover at Gary Hall and Nash Library.

C. Experience and Case Studies

Provide relevant experience and case studies from comparable commercial or institutional clients, including staff certifications.

D. Staffing, Response Times, and Service Capacity

Describe the technicians who will be assigned to this contract, your dispatch and after-hours procedures, guaranteed response times, and your capacity to support this contract alongside existing commitments.

E. Safety Plan

Describe your safety program for working in occupied academic buildings, including lockout/tagout, refrigerant handling, rooftop fall protection, and OSHA compliance.

Insurance Supplement

Prior to beginning any work, Contractor shall acquire and maintain the following minimum insurance coverages:

Coverage	Minimum Limits
Workers' Compensation	Statutory; Employer's Liability $1,000,000 each accident / disease
Commercial General Liability	$1,000,000 per occurrence / $2,000,000 aggregate
Business Automobile Liability	$1,000,000 combined single limit
Umbrella / Excess Liability	$1,000,000 per occurrence

Contractor shall provide a certificate of liability insurance naming USAO and the Board of Regents for Oklahoma Colleges as additional insureds, with thirty (30) days' written notice of cancellation or material change.

APPENDIX A — HVAC EQUIPMENT INVENTORY

The following inventory is provided for the offeror's convenience. See Section 3.2.

Student Center

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Roof Top Unit w/Gas Heat		1	1	6000	14		
Heat Recovery Unit	SEMCO	1	1	24000			
Roof Top Unit w/Gas Heat		1	2	6600	14		
Heat Recovery Unit	SEMCO	1	1	2400	4.3		
Roof Top Unit w/Gas Heat		1	3	3500	8.3		
Roof Top Unit w/Gas Heat		1	4	2200	5		
Split System w/Gas Heat		1	1	2000	5		
		1	2	2000	5		
		1	3	2000	5		
Cooling Only	Magic Aire	1	4	8000	20		
		2	5 & 6	2100	5		
Roof Top Unit w/Gas Heat		1	1	1200	3		Bookstore Roof
		1	2	1100	3		
		1	3	1100	3		
		1	4	1500	4		
Vertical Split Sys. DX w/electric Ht.		1					Bookstore east porch roof

Gary Hall

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Chiller	Carrier	1			60		

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Gas Htg Water Boiler		1					
Chilled Water Pumps		2					
Heating Water Pumps		2					
Condensate Pumps		2					
Magic Aire Air Handling Units		6	1		10		
			2		10		
			3		10		
			4		10		
			5		10		
			6		10		
Exhaust Fans		9					
Roof Mtd. Centrifugal			1				
Roof Mtd. Centrifugal			2				
Roof Mtd. Centrifugal			3				
Roof Mtd. Centrifugal			4				
In-line			5				
Roof Mtd. Centrifugal			6				
Roof Mtd. Centrifugal			7				
Roof Mtd. Centrifugal			8				
Roof Mtd. Centrifugal			9				
Outside Air Intake Hoods		4					

Canning Hall

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Split Sys w/Gas Heat	LENNOX	8	1	2000	5		
			2	2000	5		
			3	1755	5		
			4	1605	4		
			5	1755	5		
			6	1755	5		
			7	1755	5		
			8	1755	5		
Cooling only Split Sys		2	9	406	1		
Cooling only Split Sys			10	406	1		
Outside Air Intake Hood		1		840			
In-line supply fans	8		1	305		0.2	Connected to run with corresponding AHU #
			2	270		0.2	
			3	250		0.2	
			4	130		0.11	
			5	160		0.12	
			6	120		0.11	
			7	330		0.2	
			8	130		0.11	
Exhaust Fans		4	1	75			
Roof Mtd Centrifugal			2	150			
			3	500			
			4	575			

Nash Library

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Chiller w/pump	Carrier	1			100		
Gas Htg Water Boiler w/pump							
Air Handling Unit			1	8720			
Air Handling Unit			2	11949			
Air Handling Unit			3	11878			
Fan Powered Terminal Units		35					
Return Fan		1	RF-1	20502		5	
Return Fan		1	RF-2	12008		3	
Exhaust Fan		1	EF-1	1767		1/6	
Exhaust Fan		1	EF-2	488		1/3	

Music Annex

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Split Sys Heat Pump w/Electric	Mitsubishi			431 CFM	2		
Heat and Humidifier							

Art Annex

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Horizontal Split Sys w/ Gas Heat							
	Lennox		CU-1		5		
			CU-2		5		
			CU-3		5		
			CU-4		5		
			CU-5		2.5		
			CU-6		5		
Exhaust Fans							

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Roof Mtd Centrifugal			EF-1	500 CFM		0.2	
Roof Mtd Centrifugal			EF-2	500 CFM		0.2	
Roof Mtd Centrifugal			EF-3	270 CFM		0.2	
Roof Mtd Centrifugal			EF-4	100 CFM		0.2	
Roof Mtd Centrifugal			EF-5	1000 CFM		0.2	
Wall Mtd Propeller			EF-6	1000 CFM		0.25	
Wall Mtd Propeller			EF-7	1000 CFM		0.25	
Wall Mtd Propeller			EF-8	6000 CFM		0.5	
Wall Mtd Propeller			EF-9	1000 CFM		0.25	

Drover Fieldhouse

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Make up air units DX w/Gas Heat	AAON	1			40		
Make up air units DX w/Gas Heat	AAON	1			40		
RTU w/Gas Heat	YORK	1			5		
RTU w/Gas Heat	RHEEM	1			5		
RTU w/Gas Heat	TRANE	1			5		
RTU w/Gas Heat	LENNOX	1			4		
RTU w/Gas Heat	CARRIER	1			4		

Te Ata Memorial Auditorium

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Split Systems w/Steam Heat	York	2	1		25		

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
			2		25		

President's House

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Split System w/Gas Heat	LENNOX	2	1		4		
			2		4		

Alumni House

Equipment	Manufacturer	Qty	Mark	CFM	Tons/Cap.	HP	Location
Split System w/Gas Heat	LENNOX	2	1		3		
			2		3		