



## GREGORY-PORTLAND ISD

PROJECT NAME: **High School Phase II HVAC Air Side Systems Replacements & Upgrades**

CLIENT NAME: Gregory-Portland ISD

LOCATION: 1200 Broadway Blvd., Portland, TX 78374

PROJECT NUMBER: RFP# 2223-04

PROPOSAL DUE DATE: Tuesday May 9, 2023 @ 2:00 PM

### **SECTION 00 21 13 – INSTRUCTIONS TO PROPOSERS**

Proposals/Bids are solicited for furnishing the merchandise, supplies, services and/or equipment set forth in this proposal/bid. Complete proposal documents will be **accepted until May 9, 2023 @ 2:00 p.m.**, at:

Gregory-Portland ISD Administration Office, Attn: Chris Casarez- Purchasing Coordinator  
1200 Broadway Blvd.  
Portland, Texas 78410

**LATE** proposals will not be opened. Bidders are invited to be present at the proposal opening. **PLEASE MARK THE FRONT OF ENVELOPE WITH CSP# 2223-04 High School Phase II HVAC Air Side Systems Replacements & Upgrades.**

The Conditions of the Contract and applicable requirements of Division 01 govern this section.

Proposers are expected to inform themselves regarding all local conditions and are expected to inspect the site of work at Gregory-Portland High School, 4601 Wildcat Dr., Portland, Texas 78374.

Proposal documents may be examined at the following location:

Stridde, Callins and Associates, Inc.  
342 S. Navigation Blvd.  
Corpus Christi, Texas 78405  
(361) 883-9199

The Proposer shall check all proposal documents furnished them immediately upon receipt of the documents, and shall promptly notify the Engineer of any discrepancies or conflicts therein. During the time given for preparing proposals, the Engineer will give no verbal instructions to the proposers. Written addenda will be issued by the Engineer to correct discrepancies and conflicts in the documents or clarify any items that are not clearly understood.

Proposals are to be based exactly on the proposal documents. Include the materials, manufacturers and processes specified. No substitutions may be used unless they are incorporated into the proposal documents by addenda. Make requests for substitutions at least five (5) days prior to the proposal receipt date. Provide sufficient technical information on substitution items to allow the Engineer to make equitable comparison with specified items.

Addenda issued during the course of the proposal preparation time shall be delivered to each person who previously received a complete set of proposal documents. Addenda will be e-mailed no later than one (1) day prior to the proposal receipt date. Proposers must acknowledge receipt of all addenda received during the proposal preparation time as provided for on the proposal form. Such acknowledgment will constitute evidence that the Proposer has considered all changes and clarifications to the proposal documents included in the addenda in preparing his proposal and will accept inclusion of the addenda in the evaluation and/or negotiation process and ultimately in an executed contract for construction.

All proposals must be submitted on proposal form provided by the Engineer. All blanks on the proposal form shall be completed, in ink or type-written, with sums expressed in both words and figures (in case of discrepancy between the two, the amount written in words shall govern). All requested alternates shall be priced, and if no change in the base price is required, the phrase "No Change" shall be inserted into the appropriate location. Any proposal forms with qualifications added may be rejected.

A proposer may modify their proposal prior to closing time provided such modification is over the signature of the proposer.

Enclose copies of proposal form, proposal security and other documents required to be submitted in a sealed envelope addressed to the Board of Trustees, and clearly labeled with the corresponding CSP#:

Faxed proposals will not be accepted.

All questions relating to specifications must be in writing to:

Chris Casarez [ccasarez@g-pisd.org](mailto:ccasarez@g-pisd.org) , Purchasing Coordinator

Please check the website daily for addendums, and questions and answers posted.

## GREGORY-PORTLAND INDEPENDENT SCHOOL DISTRICT

1200 Broadway Blvd. Portland, TX 78374; 361-777-1091

### SCOPE OF SERVICES

The Work is generally described as the replacement of existing outside air units, energy recovery units, exhaust fans and the like and the installation of new systems and various other HVAC system improvements. The project will also include maintenance type repairs to existing HVAC systems and associated control systems. The Work is more particularly described in the drawings, specifications, proposal documents and other Contract Documents prepared by Stridde, Callins and Associates, Inc. (The Engineer), and shall include all general construction, roofing, structure, mechanical, electrical, plumbing, and other work as indicated in the Contract Documents.

### ESTIMATED PROJECT BUDGET

Five Million Two Hundred Thousand and 00/100 Dollars (\$5,200,00.00) including an Owner's Contingency Allowance of Three Hundred Thousand Dollar (\$300,000.00) and a Four Hundred and Fifty Thousand Dollar (\$450,000.00) Allowance for the BAS system construction cost.

### PROPOSER QUALIFICATIONS

Each Proposer shall deliver **Four (4) paper copies** of the Contractor's complete proposal package; One (1) original and Three (3) copies. Each copy shall be accompanied with a full electronic version in PDF format stored on the USB flash drive. Include any additional forms or documentation to supplement the Qualifications Statement for substantiation of qualifications required for the Selection Criteria. Failure to submit Qualifications Statement and required additional forms or documentation shall subject the proposal to be rejected as non-conforming.

### EVALUATION CRITERIA FOR AWARD

Award of the Contract resulting from this solicitation shall be under the selection process described herein. A committee appointed by the Owner will evaluate Proposals submitted in response to this solicitation. Contractor's Qualifications and Proposal Form are each significant consideration in the selection of a Contractor for this Project.

Pursuant to Section 2269.055(a) of the Texas Government Code, in determining the award of a contract, The Gregory-Portland Independent School District *may* consider:

- (1) the purchase price;
- (2) the Proposer's experience and reputation;
- (3) the quality of the Proposer's goods or services;
- (4) the extent to which the services meet the district's needs;
- (5) the Proposer's safety record;
- (6) the Proposer's proposed personnel;
- (7) whether the Proposer's financial capability is appropriate to the size and scope of the project; and
- (8) any other relevant factor specifically listed in the request for bids, proposals, or qualifications.

Proposals will be ranked based upon the following weighting criteria as applied to various elements of the proposal.

1. Price of Proposals: 40 possible points
2. Meets the Districts Needs: 20 possible points
3. Quality of Vendors Services: 15 possible points
4. Reputation of Vendors Services: 15 possible points
5. Proposal Packet: 10 possible points

Each of the Criteria has been assigned an appropriate weight by the Gregory-Portland Independent School District. Following an analysis and evaluation of the proposals, ranking of the Offerors will be made based upon the selection criteria. Subjective judgment on the part of the District is implicit in the criteria selection process. The application of the foregoing criteria selection process, permits placing technical and other considerations above total price. Therefore, the District reserves the right to award to other than the lowest proposed price. The Gregory-Portland Independent School District shall select the Proposer that offers the best value for the District based on its ranking evaluation. The District shall first attempt to negotiate a contract with the top ranked Proposer. The District and its Engineer and/or selection committee may discuss with the top ranked Proposer options for a scope or time modification and any price change associated with the modification. If the District is unable to negotiate a contract with the top ranked Proposer, the District shall, formally and in writing, end negotiations with that Proposer and proceed to the next Proposer in the order of the selection ranking until a contract is reached or all proposals are rejected.

Any Proposal may be considered unacceptable if the committee determines it fails to provide adequate information in technical and price proposals as specified in these Instructions to Proposers.

In determining best value for the Gregory-Portland Independent School District, the District is not restricted to considering price alone, but may consider any other factor stated in the selection criteria.

**Reservation of Rights** G-PISD expressly reserves the right to:

1. Reject or cancel any or all proposals;
2. Waive any defect, irregularity or informality in any proposal or CSP procedure;
3. Waive as an informality, minor deviations from specifications at a lower price than other proposals meeting all aspects of the specifications if it is determined that total cost is lower and the overall function is not impaired;
4. Reissue an CSP;
5. Consider and accept an alternate proposal as provided herein when most advantageous to G-PISD;
6. G-PISD has the right to cancel the contract with a thirty-day written notice, without prejudice, for factors including, but not limited to, non-availability or non-appropriation of funds; and/or
7. Procure any item or services by other means to meet time-sensitive requirements.

## Responsibilities of Offerors

1. The responsibility for compliance with this solicitation and the subsequent contract shall be with the bidder/ offeror.
2. Offerors are expected to provide prompt service that is due under this contract including warranties and identified deliverables. Past performance of offerors may be a factor in awarding future contracts.
3. Offerors are expected to deliver service(s) per specifications.
4. **Submit three (3) copies and one (1) original and one (1) electronic copy (jump drive)**
5. The proposer declares that in the event of the award of a contract to the undersigned to this offer will comply with all federal, state and local laws.
6. Respondents are asked to honor the fidelity of the proposal process by limiting contact regarding the proposal to only the District's representatives designated herein.

**Responses to the RFP are due to the District by 2:00 P.M. on May 9, 2023**

## ATTACHMENTS TO BE COMPLETED AND RETURNED WITH EACH PROPOSAL

Attachment A.	W-9
Attachment B.	Form CIQ: Conflict of Interest Questionnaire
Attachment C.	Felony Conviction Notice
Attachment D.	Non-Collusion Statement
Attachment E.	Suspension or Debarment Certificate

# Request for Taxpayer Identification Number and Certification

**Give Form to the  
 requester. Do not  
 send to the IRS.**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

<b>Print or type. See Specific Instructions on page 3.</b>	<b>1</b> Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	<b>2</b> Business name/disregarded entity name, if different from above	
	<b>3</b> Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.	<b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	Exempt payee code (if any) _____
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.	Exemption from FATCA reporting code (if any) _____
	<input type="checkbox"/> Other (see instructions) ▶ _____	<small>(Applies to accounts maintained outside the U.S.)</small>
	<b>5</b> Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
<b>6</b> City, state, and ZIP code		
<b>7</b> List account number(s) here (optional)		

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

<b>Social security number</b>											
				-			-				
<b>or</b>											
<b>Employer identification number</b>											
				-							

## Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
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## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

**CONFLICT OF INTEREST QUESTIONNAIRE**  
**For vendor doing business with local governmental entity**

**FORM CIQ**

**This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.**

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

**OFFICE USE ONLY**

Date Received

**1 Name of vendor who has a business relationship with local governmental entity.**

**2**  **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

**3 Name of local government officer about whom the information is being disclosed.**

\_\_\_\_\_  
Name of Officer

**4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.**

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes       No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes       No

**5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.**

**6**  **Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).**

**7**

\_\_\_\_\_  
Signature of vendor doing business with the governmental entity

\_\_\_\_\_  
Date

**FELONY CONVICTION NOTICE**

Texas Education Code, Section 44.034, Notification of Criminal History, Subsection (a) states, "a person or business entity that enters into a contract with a School District must give **advance notice** to the District if the person or owner or operator of the business entity has been convicted of a felony." The notice must include a general description of the conduct resulting in the conviction of a felony.

Subsection (b) states, "a school District may terminate a contract with a person or business entity if the District determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction." The District must compensate the person or business entity for services performed before the termination of the contact.

I, the undersigned agent for the firm named below, certify that the information concerning notification of felony conviction has been reviewed by me and the following information furnished is true to the best of my knowledge.

Vendor's Name \_\_\_\_\_

Authorized Company  
Official's Name (please print) \_\_\_\_\_

A. My firm is not owned or operated by anyone who has been convicted of a felony.

Signature of Company Official \_\_\_\_\_ Date: \_\_\_\_\_

B. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony.

Name of Felon(s) \_\_\_\_\_  
\_\_\_\_\_

Details of Conviction(s) \_\_\_\_\_  
\_\_\_\_\_

Signature of Company Official \_\_\_\_\_ Date: \_\_\_\_\_

C. My firm is a publicly owned, Stock-exchange Corporation; therefore, this reporting requirement is not required.

Signature of Company Official \_\_\_\_\_ Date: \_\_\_\_\_



## **Suspension or Debarment Certificate**

Non-Federal entities are prohibited from contracting with or making subawards under covered transactions to parties that are suspended or debarred or whose principals are suspended or debarred. Covered transactions include procurement for goods or services equal to or in excess of \$100,000.00. Contractors receiving individual awards for \$100,000.00 or more and all subrecipients must certify that the organization and its principals are not suspended or debarred.

By submitting this offer and signing this certificate, the bidder:

- Certifies that the owner/operator has not been convicted of a felony except as indicated on separate attachment to this offer, in accordance with Section 44.034, Texas Education Code, and
- Certifies that no suspension or disbarment is in place, which would preclude receiving a federally funded contract under the Federal OMB, A-102, Common Rule ( \_36)

Vendor Name \_\_\_\_\_

Authorized Company Official's Name \_\_\_\_\_

Signature of Company Official \_\_\_\_\_ Date \_\_\_\_\_

Vendor E-mail Address \_\_\_\_\_

Vendor Telephone Number \_\_\_\_\_