



Devoted to the Future of You.

**REQUEST FOR PROPOSALS:**

**HVAC PM  
FOR**

**CARLOW UNIVERSITY**

**05/02/2025**

***Proposals Due: 05/23/2025 5pm***

## **REQUEST FOR PROPOSALS – HVAC PM**

### **1.0 Introduction**

#### **1.1 Background on the Request for Proposal**

- A. Carlow University (the “University” or “CARLOW”) is requesting “Proposals” Carlow University is seeking proposals from qualified vendors for **HVAC PM**, while ensuring compliance with federal and state regulations. To be considered, written proposals addressing the questions provided herein must be delivered in a sealed envelope, bearing on the outside: the name of the Proposer, the Proposer’s address, the words “Carlow University’s RFP #2025-003”, to the Office of Facilities, Attention: Michael Spano, **on or before 5 p.m. EST on 05/23/2025** at 3333 Fifth Avenue, Pittsburgh, PA 15213. Late submissions will not be considered.
- B. At the conclusion of this RFP process, and if the cost-benefit analysis supports a change, CARLOW is prepared to select and enter into an agreement with the selected individual and/or firm to assure that CARLOW has ongoing and expeditious access to HVAC PM at competitive (and preferably discounted) rates.

#### **1.2 Carlow’s Mission**

Carlow University, rooted in its Catholic identity and embodying the heritage and values of the Sisters of Mercy, offers transformational educational opportunities for a diverse community of learners and empowers them to excel in their chosen work as compassionate, responsible leaders in the creation of a more just and merciful world.

#### **1.3 Overview of the University**

Carlow is a private, co-educational, Catholic liberal arts university located in the Oakland neighborhood, the heart of Pittsburgh’s “Eds, Meds, and Tech” district. Founded by the Sisters of Mercy in 1929, this diverse, inclusive Mercy University embodies the values of its founders, offering its students transformational educational opportunities that empower them to excel in their chosen work as compassionate, responsible leaders in the creation of a more just and merciful world.

In today’s societal landscape, these espoused values have never been more relevant.

Consistent with its tradition of academic excellence, Carlow’s curricula and partnerships reflect its strong commitment to social justice, ethical forward-thinking leadership and meaningful service to the community that makes an impact. Carlow offers over 50 undergraduate, graduate and certificate programs, including nursing, physical therapy, occupational therapy, education, business, and more. In addition to the traditional classroom teaching, Carlow offers experiential learning opportunities and internships through regional partnerships. Carlow

provides transformational learning experiences that empower graduates to become forward-thinking, ethical leaders who give back and make a difference in the world.

Carlow's men's, women's and co-ed sports are known as the Celtics, a reflection of the University's Irish heritage and roots.

**Address:**

Carlow University  
3333 Fifth Avenue  
Pittsburgh, PA 15213

**Website:**

[www.carlow.edu](http://www.carlow.edu)

**Telephone:**

412-578-6000

## **2.0 Summary & Overview**

This Request for Proposal (RFP) serves as a foundation for engaging a vendor who can deliver high-quality solutions that align with our needs. Respondents are expected to thoroughly address each section to demonstrate their ability to meet or exceed Carlow's requirements.

The primary goal of this RFP is to solicit proposals from qualified firms that can provide HVAC PM and offer the best overall fit for CARLOW. The RFP includes providing detailed responses to the following critical questions, to ensure alignment with Carlow's goals and requirements.

<b>QTY</b>	<b>Component</b>	<b>Manufacturer</b>	<b>Model</b>	<b>Rating</b>	<b>Location</b>
4	AHU's	McQuay			AJP BUILDING
2	<i>RIA</i> Fans				AJP BUILDING
2	Exhaust Fans				AJP BUILDING
2	HWBoilers	Peerless			AJP BUILDING
I	Floor Pump				AJP BUILDING
I	5-ton Split System			ST	Antonian Hall
I	Steam Boiler	Peerless			St. Agnes
4	Residential Furnace				St. Agnes

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4	Residential Condenser				St. Agnes
I	Heat Exchanger	Xetex			St. Joe's <b>Gymnasium</b>
2	Floor Mount pumps	Armstrong			St. Joe's <b>Gymnasium</b>
2	Power Fan Boiler	Lochinvar			St. Joe's Gymnasium
I	Steam Boiler	Peerless		460,000BTU	Trinity Hall
2	BCU	Trane			Tieznnon Hall
2	<b>Condenser</b>	Trane		5-ton	Tieznnon Hall
I	RTU	<b>Trane</b>			Tieznnon Hall
I	Exhaust Fan				Tieznnon Hall
I	AHU				University <b>Commons</b>
2	Steam Boiler	<b>Peerless</b>			Dougherty Hall
2	Condensate Pump				Dougherty Hall

<b>QTY</b>	<b>Component</b>	<b>Manufacturer</b>	<b>Model</b>	<b>Rating</b>	<b>Location</b>
2	Floor mount pump	B&G			Dougherty Hall
1	Domestic HW boiler	AO Smith	<b>Duramax</b>		Doughery Hall
1	HW boiler	Weil Mclain			Francis Ward
1	HWBoiler	American Standard			Francis Ward
1	Domestic HW boiler	AO Smith	<b>Duramax</b>		Francis Ward
2	Floor mounted pumps				Francis Ward
1	<b>Air compressor</b>				Curran Hall
1	Air dryer				Curran Hall
1	Steam Boiler	<b>Peerless</b>	211A-10-W/S-I	1,890,000BTU	Curran Hall
1	Inline pump	Grundfos			Curran Hall
I	AHU	Westinghouse	PGA-0117-1		Curran Hall

I	Axial fan for Westinghouse AHU				Curran Hall
I	<b>Condenser</b>	<b>Trane</b>	RAUCC50FBZI 300D000009	C08F06488	Curran Hall

1. Four (4) visits per year: Labor only to provide maintenance inspections and testing. Services to be provided:
  - a. Coil Cleaning - For all applicable equipment (1x per Yr.)
  - b. Inspect and test boilers (2x per Yr.)
  - c. Inspect and lubricate pumps (4x per Yr.)
  - d. Inspect and lubricate air handlers (4x per Yr.)
  - e. Inspect exhaust fans (1x per Yr.)
  - f. Filter changes

<b>QTY</b>	<b>Component</b>	<b>Manufacturer</b>	<b>Model</b>	<b>Rating</b>	<b>Location</b>
1	Chiller	McQuay	PEH063-CCBS		AJP
1	Chiller	McQuay	PEH063-CCBC		AJP
1	Chiller	McQuay	PEH087-ABBB		University Commons
1	Chiller	McQuay	ACA110BT306		Saint Francis
2	Floor Pump	B&G	VXC – VXCS 9	30HP	
2	Floor Mounted Pump	B&G	VXC – VSC 8.125	25HP	
2	Floor Mounts Pump (CP-1 & CP-2)	B&G			
2	Vertical Inline Pump	B&G			
1	Floor Mounted Pump (CHP-1)	B&G		30HP	

#### Preventative Maintenance Services for (4) McQuay Chillers

1. Chiller tube cleaning (1x / Yr.)
2. Clean coils on Air Cooled chiller (1x / Yr.)
3. Check starter operation and all connect points
4. Meggar all motors including oil pump motors
5. Grease all motors
6. Change Cooling tower belts
7. Clean strainers
8. Inspect and adjust overloads
9. Inspect and tighten all electrical connections
10. Pressure check for refrigeration leaks
11. Take oil sample and send for analysis
12. Mechanical clean condenser tubes

13. Check liquid line filters
14. Check refrigeration temperatures
15. Check superheats
16. Check subcooling
17. Check voltages
18. Check amperages
19. Check water temperatures
20. Check water pressures
21. Check condenser flow
22. Check evaporator flows
23. Monitor purge run times
24. Refrigerant
25. Change oil and filter
26. Leak repairs
27. Check subcooling
28. Check voltages
29. Check amperages
30. Check water temperatures
31. Check water pressures
32. Check condenser flow
33. Check evaporator flows
34. Monitor purge run times

#### **A. Conflict of Interest**

All Respondents must disclose the name of any officer, director or agency who is also an employee of Carlow University. All Respondents must disclose the name of any Carlow employee who owns, directly or indirectly, any interest in the Respondents' business or any of its campuses. Such disclosure must be submitted as a cover letter included with the Request for Proposal, addressed to the Assoc. VP, Human Resources & Chief HR Officer no later than the proposal due date of January 31, 2025.

## B. Fee

CARLOW will review the submitted options and potentially select a firm to provide services. CARLOW may choose, in the sole exercise of its discretion, one of the Respondents. In addition, the selection of a Respondent pursuant to this RFP does not guarantee that CARLOW will award a contract to any of the firms responding to this RFP.

CARLOW prefers a payment schedule which breaks down the total yearly cost into equal installments, paid throughout the year, such as bi-annually, quarterly, or monthly. Carlow's preference is Net 60, although Net 45 is a consideration.

## C. Proposal Submission Content

Proposals must include all the information listed below:

- a. Cover Letter
- b. Respondent Qualifications
- c. Answers to all applicable questions asked in Section 2.0
- d. Full costs broken down by service provided
- e. List of three (3) references

## 3.0 Submission of Responses

### 1.1 Schedule

**3.1.1.1** The RFP process will proceed according to the following anticipated schedule:

ACTIVITY	DATE
RFP Issued	05/02/2025
Full Proposals Due	05/23/2025 (5:00 p.m. EST)
On Site Visits	05/26/2025-06/13/2025
Contract Awarded	6/20/2025

**3.1.1.2** Responses must be received by CARLOW at the address set forth in Section 3.2 (b) no later than **5:00 p.m. EST, on 05/23/2025**. An electronic response may be accepted by CARLOW for purposes of meeting the response submission deadline only, provided that it is received by CARLOW within the deadline set forth above and further provided that the electronic response is followed up by delivery of a hard copy that must be received by CARLOW within forty-eight (48) hours

after CARLOW's receipt of the electronic response and that such hard copies do not vary, modify or correct the electronic response provided. CARLOW shall determine in its sole discretion whether the response has been received within the deadlines established herein. CARLOW shall not be responsible or liable in any way for late delivery or receipt of responses for any reason whatsoever including, but not limited to, equipment, technical, or network malfunction. Respondents shall assume the risk that an electronic submission may not be received by CARLOW within the deadlines established in section 3.1(b) because of equipment, network or technical malfunction.

**3.1.1.3** The responses will be evaluated pursuant to the criteria set forth in this RFP. Notification of selection or non-selection of all Respondents who submitted conforming responses will be mailed when the prequalification selection process is final.

**3.1.1.4** All respondents are solely responsible for obtaining and completing the required attachment identified in the RFP and for checking any modifications that are subsequently made to this RFP or its attachment(s).

**3.1.1.5** The selected Respondent(s) will execute the HVAC PM Agreement. RESPONDENTS ARE REQUIRED TO SPECIFY ANY EXCEPTIONS TO THE MASTER SERVICES AGREEMENT AND TO MAKE ANY SUGGESTED COUNTERPROPOSAL WITH THEIR RESPONSE. CARLOW WILL REVIEW ANY SUCH SUGGESTIONS, BUT RESERVES SOLE RIGHT TO ACCEPT OR DENY SUCH SUGGESTIONS. A FAILURE TO SPECIFY EXCEPTIONS AND/OR COUNTERPROPOSALS WILL BE DEEMED AN ACCEPTANCE OF THE MASTER SERVICES AGREEMENT'S TERMS AND CONDITIONS.

#### **3.2.4 Proposal submittal**

Proposals must be received by CARLOW no later than **5:00 p.m. EST on 05/23/2025** at the street and e-mail address indicated at the bottom of this section. Proposals must be limited to ten 8½" x 11" pages and clearly marked "CARLOW RFP #2025-003" Firms shall submit one unbound, reproducible original copy of the proposal and four bound copies to the street address below **and** submit the proposal in PDF format to the e-mail address below.

Michael Spano  
Maintenance Supervisor  
Carlow University  
3333 Fifth Avenue



Pittsburgh, PA 15213  
mjspano@carlow.edu

#### **4.0 Evaluation Criteria**

All proposals must meet or exceed mandatory requirements outlined in this RFP in order to be reviewed. Those proposals meeting the minimum mandatory requirements will be considered based upon a point scoring evaluation system described in this section. Evaluations and selection will be based on written qualification and oral presentation, if deemed necessary, with emphasis on Respondent Qualifications, Answers to Questions, Interviews, and Total Cost of the proposal. Considerations will also be made to respondents with shared values and/or MWDBE certification. The maximum possible for the combined areas will be 100 points.

#### **5.0 Other Information**

- A. The University reserves the right to seek additional information from any responding party and to schedule interviews with one or more of the responding firms.
- B. Carlow University reserves the right to reject any and all Proposals, to waive any minor informality in the Proposals or to enter into any contract deemed by the University to be in its best interest.
- C. The University reserves the right to amend this RFP at any time and negotiate the scope of services and/or fee terms with one or more of the responding firms.

#### **6.0 Equal Employment Opportunity, Non-Discrimination and Affirmative Action**

CARLOW is committed to equal employment opportunity and non-discrimination in contracting for goods and services necessary to perform its business. CARLOW will take affirmative action to ensure equal employment opportunity and to eliminate discriminatory barriers. CARLOW will strongly consider the Respondents' commitment to equal employment opportunity and affirmative action in selecting the individuals or firms and Respondents are encouraged to propose a team that reflects such diversity. As set forth in Section 3.3(1) of this RFP, Respondents are required to submit copies of their employment and affirmative action policies demonstrating their commitment to equal opportunity, non-discrimination and diversity. Respondents are encouraged to propose a team reflecting its commitment to diversity.

#### **7.0 General Information & Other Provisions**

- A. CARLOW reserves the right to cancel or modify this RFP, in whole or in part, or reject all Proposals submitted in response to this RFP if such action is determined to be in the best interest of the University. CARLOW may extend the deadline for submission of Proposals if, in CARLOW's judgment, such extension is necessary for any reason. If CARLOW determines that it is necessary to revise any part of this RFP, or if CARLOW determines

that additional data is necessary to clarify any of its provisions, an Addendum will be posted on CARLOW's website at [www.carlow.edu](http://www.carlow.edu). CARLOW's failure to provide such notification shall not relieve interested individuals and firms desiring to submit a proposal from their responsibility to obtain the Request for Proposals and any and all addenda that may be issued in connection with this RFP.

- B. CARLOW reserves the right to reject any and all responses if CARLOW determines, within its sole discretion, that it is in the best interests of CARLOW to so, CARLOW reserves the right to reject any Response that fails to meet any of the terms, conditions, requirements, and procedures included in this RFP. If a Respondent fails to meet any material terms, conditions, requirements or procedures, the Response may be deemed unresponsive and disqualified.
- C. All expenses and costs, including but not limited to legal costs, associated with developing or submitting a proposal in response to this RFP, or associated with oral or written clarification thereof, including all presentation materials and related costs and travel expenses, shall be borne solely by the responding firm, and under no circumstances shall CARLOW be responsible for any such cost or expense incurred by any responding firm. CARLOW assumes no responsibility for these costs and expenses.
- D. Responding firms may withdraw their proposals, by written request only, received by CARLOW prior to, but not after, the time set for proposal submission. Thereafter, proposals shall be irrevocable for a period of not less than sixty (60) days and may not be withdrawn or modified.
- E. Any proposal which is not received by CARLOW by the date and time and at the location for submission of proposals set forth herein will be determined to be late and shall not be considered.
- F. CARLOW reserves the right to waive any irregularities or requirements; and to negotiate with all respondents, in any manner necessary, in its sole judgment and discretion, to serve the best interest of CARLOW.
- G. All responses, proposals, related documentation and information submitted in response to this RFP are subject to the Pennsylvania Freedom of Information Act, regarding public access to such documents. Any statements submitted by the respondent that purport to reserve any confidentiality or privacy rights in submitted responses or that are otherwise inconsistent with these statutes will be void and disregarded. By submitting its Response to CARLOW, the Respondent agrees that CARLOW shall not be liable under any circumstances for the subsequent disclosure of any materials submitted to it by Respondent pursuant to this RFP and/or in connection with any contract entered into between Respondent and CARLOW as a result of the RFP process.
- H. Further, any selected Respondent must recognize that in the performance of the Master Services Agreement, and any contract issued thereto, it may become a holder of personal data or other information deemed confidential. Respondent shall comply with the laws and regulations relating to confidentiality and privacy, including any policies and procedures of CARLOW. Any questions concerning issues of confidentiality, the submission of materials to CARLOW, or any other questions related to these matters, should be directed

to Michael Spano at [mjspano@carlow.edu](mailto:mjspano@carlow.edu).

- I. Unless otherwise specified in this RFP, all communications, responses, and documentation must be in English, and all cost proposals or figures in U.S. currency. All responses must be submitted in accordance with the specific terms of this RFP.
- J. Respondents are prohibited from communicating directly with any employee of CARLOW, except as specified in this RFP, regarding the RFP, and no other individual CARLOW employee or representative is authorized to provide any information or respond to any questions or inquiries concerning this RFP. Respondents may contact the Contact Person for this RFP provided in Section 3.2.4, in the event that this RFP appears incomplete in any way.
- K. CARLOW may provide reasonable accommodations, including the provision of material in an alternative format, for qualified Respondents with disabilities or other hardships. Respondents requiring accommodation shall submit requests in writing, with supporting documentation justifying the accommodations, to the contact person listed in Section 3.2.4 above. CARLOW reserves the right to grant or reject any request for accommodations.
- L. If a Respondent is unable to meet any of the specifications required in this RFP, the Respondent's response must include an alternative method for meeting such specification by identifying the specification, the proposed alternative and thoroughly describing how the alternative achieves substantially equivalent or better performance to the performance required in the RFP specification. CARLOW will determine, in its sole discretion, if a proposed alternative method of performance achieves substantially equivalent or better performance.
- M. Costs that are not specifically identified in the Respondent's response and not specifically accepted by CARLOW as part of a Contract will not be compensated under any Contract awarded pursuant to this RFP. CARLOW shall not be responsible for any costs or expenses incurred by Respondents in responding to this RFP.
- N. The Respondent may not alter the RFP or its components except for those portions intended to collect the Respondent's response. Modifications to the body of this RFP, specifications, terms and conditions, or which change the intent of this RFP are prohibited. Any modifications other than where the Respondent is prompted for a response will disqualify the bid. The foregoing notwithstanding, proposed exceptions and/or counterproposals to the Master Services Agreement are permitted to be submitted with a Response.
- O. Respondent's submitted Response shall be treated by CARLOW as an accurate statement of Respondent's capabilities and experience. Should any statement asserted by Respondent prove to be inaccurate, misleading or inconsistent with the foregoing, such inaccuracy or inconsistency shall constitute sufficient cause for rejection of the Response and/or of any resulting contract. CARLOW, within its sole discretion, will rule on any such matters and will determine appropriate action.
- P. Prior approval by CARLOW is required for any subcontracted services under any Master

Services Agreement entered into as a result of this RFP. Selected Respondent contractors are responsible for the satisfactory performance and adequate oversight of their subcontractors. Subcontractors are required to meet the same requirements and are held to the same reimbursable cost standards as the selected Respondent contractors.

- Q. Master Services Agreements entered into as a result of this RFP shall be on a fee for service basis. Once the Respondent has been selected and executed a Master Services Agreement, CARLOW intends to award all contracts for HVAC PM based on either (1) bids submitted by selected Respondents, or (2) based on CARLOW's sole discretion in determining which of the selected Respondents presents the best value option (the "List Selection"). Procurement done by either Bids or List Selection shall be deemed competitive. It is further anticipated that the term of the Master Services Agreement entered into pursuant to this RFP will be for a term of at least twenty-four (24) months, with CARLOW's option to renew it in its sole discretion.

## **8.0 Responsiveness & Irregularities**

- A. Any proposal determined to be non-responsive to this RFP, including instructions governing the submission of proposals, will be disqualified without evaluation unless the evaluation committee determines that the noncompliance is insubstantial.
- B. CARLOW reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to request modifications of the response, to request clarification of the response, and to accept or reject any or all of the responses received.

Thank you in advance for your interest in providing services to Carlow University.

Michael Spano  
Maintenance Supervisor  
Carlow University

**List of Attachments to the RFP**

Attachment A: *Authorized Representative's Signature and Acceptance Form*

**ATTACHMENT A**

**CARLOW UNIVERSITY**  
**AUTHORIZED RESPONDENT'S SIGNATURE AND ACCEPTANCE FORM**

The undersigned is a duly authorized representative of the Respondent listed below. The Respondent has read and understands the RFP requirements. The Respondent acknowledges that all of the terms and conditions of the RFP are mandatory, and that Respondent's response is compliant with such requirements. The Respondent understands that, if selected by Carlow University ("CARLOW"), the respondent and CARLOW will execute written agreements specifying the mutual requirements of participation. The Respondent agrees that the RFP will be incorporated into and made part of any Agreement resulting from the Respondent's response to the RFP. The Respondent further agrees to the contract terms in CARLOW consultants' Master Services Agreement. The respondent agrees that the entire bid response will remain valid for sixty (60) days from the proposal due date to CARLOW.

I hereby certify that: (a) I am an authorized representative of the Respondent herein; and (b) the statements made in this response to the RFP, including all attachments and exhibits, are true and correct to the best of my knowledge.

Respondent: \_\_\_\_\_  
(Printed Name of Respondent)

By: \_\_\_\_\_  
(Signature of Authorized Representative)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_