REQUEST FOR QUOTATIONS (RFQ)

HVAC PREVENTIVE MAINTENANCE AND REPAIR SERVICES

1. PURPOSE

The Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians ("CTCLUSI" or "Tribes") is requesting quotations from qualified HVAC contractors to provide scheduled preventive maintenance, inspection, diagnostic, repair, emergency response, and related HVAC services for CTCLUSI properties identified in **Attachment A – Property Locations.**

CTCLUSI facilities may include administrative offices, medical/healthcare facilities, residential properties, warehouses, community facilities, and other Tribal properties.

The objective of this RFQ is to establish a service agreement with a qualified contractor capable of maintaining CTCLUSI HVAC equipment in safe, reliable, efficient, and serviceable conditions while providing timely repair and emergency-response services when required.

2. SCOPE OF SERVICES

The selected Contractor shall provide all labor, supervision, tools, diagnostic equipment, transportation, and other resources necessary to perform HVAC preventive maintenance and authorized repair services.

2.1 Preventive Maintenance

The Contractor shall perform scheduled preventive maintenance services at the frequencies specified in **Attachment B – Preventive Maintenance Schedule**, in accordance with equipment manufacturer recommendations, applicable codes and regulations, and generally accepted HVAC industry standards and best practices.

Attachment C – HVAC Service, Maintenance Type, by Location identifies the types of HVAC systems and equipment currently installed at each CTCLUSI facility. The Contractor shall tailor preventive maintenance activities to the specific equipment type, operating requirements, and conditions at each location.

Preventive maintenance services shall include, but are not limited to, the following, as applicable to each HVAC system:

- Inspect HVAC equipment for proper operation and overall condition;
- Inspect, clean, and/or replace filters as required;
- Inspect belts, pulleys, bearings, motors, and related components;
- Check refrigerant systems for proper operation and indications of leakage;
- Inspect condensate drains, drain pans, and associated piping;
- Inspect evaporator and condenser coils and clean as required;
- Inspect electrical connections, contactors, relays, capacitors, disconnects, and controls;
- Check thermostats, sensors, control systems, and operating sequences;
- Inspect fans, blowers, dampers, and associated components;
- Inspect heat exchangers, burners, ignition systems, and combustion components, when applicable;
- Verify operating temperatures, pressures, amperage, voltage, and other applicable operating conditions;
- Inspect outdoor equipment for debris, damage, deterioration, and proper airflow;
- Lubricate equipment where required;
- Identify unusual noise, vibration, leakage, wear, corrosion, or other conditions requiring attention;
- Verify equipment is operating safely and efficiently;
- Document deficiencies and recommended corrective actions; and
- Provide a written service report following each scheduled maintenance visit.

The Contractor shall not perform repairs or replacements outside the authorized preventive-maintenance scope without prior CTCLUSI authorization, except when immediate action is necessary to address an imminent threat to life or property.

2.2 HVAC Repair Services

CTCLUSI may request HVAC diagnostic and repair services on an as-needed basis.

Services may include:

- Troubleshooting and diagnostics;
- Equipment and component repair;
- Motors, belts, bearings, capacitors, contactors, relays, and controls;
- Thermostats and sensors;
- Refrigerant-related repairs;
- Compressors;
- Fans and blower assemblies;
- Pumps;
- Electrical components associated with HVAC equipment;

- Condensate systems;
- Equipment controls;
- Replacement of failed components; and
- Other HVAC repairs authorized by CTCLUSI.

For repairs the Contractor shall provide a written estimate and obtain written authorization or purchase order number from CTCLUSI before proceeding.

The written estimate shall identify anticipated labor hours, labor rate, parts/materials, applicable markup, equipment, subcontractor costs, and any other charges.

2.3 Emergency Services

The Contractor shall provide an established process for requesting emergency HVAC services.

Respondents shall identify in their quotation:

- Normal business hours;
- After-hours contact procedures;
- Emergency contact number;
- Typical response time during normal business hours;
- Typical response time after hours, weekends, and holidays;
- Emergency labor rates;
- Minimum service-call charges, if applicable; and
- Geographic or other limitations affecting emergency response.

Conditions involving medical/healthcare facilities, loss of critical heating or cooling, potential property damage, or other critical Tribal operations may require priority response.

2.4 Equipment Replacement and System Improvements

During maintenance or repair activities, the Contractor may identify equipment requiring major repair, replacement, or modernization.

Recommendations shall be provided separately in writing and shall include, as applicable:

- Description of the existing condition;
- Recommended corrective action;
- Estimated remaining useful life;
- Repair versus replacement considerations;
- Estimated cost;
- Energy-efficiency considerations; and
- Potential operational impacts.

CTCLUSI is not obligated to purchase recommended equipment or improvements from the Contractor under this agreement.

Major equipment replacements, capital improvements, or projects outside the scope of this RFQ may require separate quotations, competitive procurement, or written authorization by CTCLUSI.

3. SERVICE DOCUMENTATION

Following each preventive-maintenance or repair visit, the Contractor shall provide a service report identifying:

- CTCLUSI property/location;
- Date and time of service;
- Technician performing the work;
- Equipment serviced;
- Equipment identification or asset number, when available;
- Maintenance or repair performed;
- Condition of equipment;
- Parts or materials used;
- Deficiencies identified;
- Recommended repairs or corrective actions;
- Safety concerns, if any; and
- Technician's name/signature or electronic verification.

CTCLUSI may use these records to establish and maintain HVAC equipment and maintenance history for Tribal properties.

4. CONTRACTOR QUALIFICATIONS

Respondents shall provide sufficient information to demonstrate the firm's ability to perform the requested services.

At a minimum, the quotation shall include:

1. Company name, address, telephone number, email address, and primary contact;
2. Current licenses required to perform the proposed HVAC services in the State of Oregon;
3. Applicable HVAC certifications and professional credentials;
4. Evidence of appropriate insurance coverage;
5. Description of the firm's HVAC maintenance and repair experience;
6. Experience servicing commercial, residential, medical/healthcare, warehouse, governmental, or similar facilities;
7. Number and qualifications of technicians available to serve CTCLUSI locations;

8. Geographic service area;
9. Normal and emergency response capabilities;
10. Ability to maintain service and equipment records;
11. At least three references for clients receiving comparable HVAC services; and
12. Disclosure of any subcontractors anticipated to perform services.

Experience working with Tribal governments, Tribal enterprises, governmental entities, federally funded projects, or similar organizations may be identified but is not required unless specifically stated elsewhere in this RFQ.

5. PRICING

Respondents shall provide complete pricing sufficient for CTCLUSI to evaluate the anticipated cost of services.

Pricing shall identify, at minimum:

Scheduled Preventive Maintenance

- Preventive-maintenance price for each property;
- Preventive-maintenance price by equipment/unit, if applicable;
- Proposed frequency of service; and
- Annual total preventive-maintenance cost.

Labor Rates

- Regular business-hours HVAC technician rate;
- Journeyman or specialized technician rate, if different;
- Apprentice/helper rate, if applicable;
- After-hours rate;
- Weekend rate;
- Holiday rate; and
- Emergency service rate.

Additional Charges

- Service-call/trip charge;
- Minimum labor charge;
- Mileage or travel charges;
- Diagnostic charges;
- Parts/material markup percentage;
- Equipment markup percentage;
- Subcontractor markup percentage;
- Refrigerant pricing or pricing methodology;

- Filter pricing, if not included in preventive maintenance; and
- Any other fee or charge that may be invoiced to CTCLUSI.

Any charge not identified in the Contractor's quotation may be subject to CTCLUSI approval before it is incurred.

Respondents shall clearly identify what materials, filters, consumables, travel, and other costs are included in the preventive-maintenance price.

6. INVOICING AND PURCHASE AUTHORIZATION

The Contractor shall not perform work beyond authorized preventive maintenance without appropriate CTCLUSI authorization.

CTCLUSI may issue a Purchase Order, Blanket Purchase Order, work authorization, or other written authorization for services.

Invoices shall reference the applicable CTCLUSI Purchase Order number and identify:

- Property/location;
- Date of service;
- Description of services;
- Technician labor hours and applicable rate;
- Parts and materials;
- Applicable markup;
- Service-call or travel charges, if authorized; and
- Associated service report or work order.

Invoices containing unauthorized charges may be returned for correction.

7. INSURANCE AND SAFETY

The selected Contractor shall maintain all licenses, certifications, insurance, and workers' compensation coverage required by applicable law and the resulting agreement.

Contractor personnel shall comply with applicable federal, state, local, Tribal, environmental, occupational safety, refrigerant-handling, and facility-specific requirements.

Additional requirements may apply when services are performed at CTCLUSI healthcare, residential, public safety, or other restricted facilities.

8. QUESTIONS AND CLARIFICATIONS

Questions or requests for clarification regarding this RFQ shall be submitted in writing by email to **procurement@ctclusi.org** no later than **November 13th, 2026, at 3 PM Pacific Time.**

Questions should identify the applicable RFQ section, attachment, equipment item, or requirement.

Responses that clarify, modify, or materially affect the Scope of Work, quotation requirements, schedule, specifications, or other solicitation requirements may be issued to prospective Respondents by written Addendum.

Only a written Addendum issued by CTCLUSI Procurement may modify the requirements of this RFQ.

9. QUOTATION BID SUBMISSION

Quotations shall be submitted no later than:

November 30th 2026
3 PM Pacific Time

Submission Method: **procurement@ctclusi.org**

Quotations received after the stated deadline may be rejected in accordance with CTCLUSI procurement requirements.

Contract will start in **January 2027**.

10. QUOTATION EVALUATION

CTCLUSI may evaluate quotations based upon factors including:

- Responsiveness and completeness;
- Contractor qualifications and applicable licensing;
- Relevant HVAC experience;
- Preventive-maintenance approach;
- Ability to service the CTCLUSI locations identified in Attachment A;
- Staffing and technical resources;
- Routine and emergency response capabilities;
- References and past performance;
- Pricing and overall cost;
- Exceptions to CTCLUSI requirements; and
- Overall ability to meet CTCLUSI's operational requirements.

CTCLUSI may request clarification or additional information and may verify licenses, certifications, references, insurance, and other information submitted by a Respondent.

Award, if made, will be made in accordance with applicable CTCLUSI procurement requirements.

11. SOLICITATION CONDITIONS

Proposal/Quotation Costs. CTCLUSI is not responsible for costs incurred by a Respondent in preparing, submitting, presenting, or clarifying a quotation.

No Guarantee of Work. Estimated quantities, service calls, repairs, and expenditures are not guarantees of future work. CTCLUSI makes no guarantee regarding the amount of repair or emergency work that will be required.

Right to Reject. CTCLUSI reserves the right to reject any or all quotations, waive minor informalities when permitted, request clarification or additional information, cancel or amend the solicitation, and make an award determined to be in CTCLUSI's best interest and consistent with applicable procurement requirements.

Conflicts of Interest. Respondents shall disclose actual, potential, or apparent conflicts of interest associated with the proposed services.

Non-Collusion. By submitting a quotation, the Respondent certifies that its quotation was independently prepared without collusion, price fixing, or other agreement intended to improperly restrict competition.

Suspension and Debarment. When applicable to federally funded work, the Contractor and applicable principals and subcontractors shall not be suspended, debarred, or otherwise excluded from participation in covered federal transactions.

Tribal Sovereignty. Nothing in this RFQ, the procurement process, or any resulting agreement constitutes or shall be construed as a waiver of CTCLUSI's sovereign immunity, rights, privileges, jurisdiction, or authority. Any waiver must be expressly authorized in writing by the appropriate CTCLUSI governing authority.

12. TERM OF AGREEMENT

CTCLUSI anticipates an initial agreement term of **two years**, with a **one year optional renewal period** subject to satisfactory performance, continued need, funding availability, applicable procurement requirements, and written agreement by CTCLUSI.

Pricing shall remain firm for the initial contract period unless otherwise expressly provided in the resulting agreement.

Any proposed price adjustment for an optional renewal period must be submitted in writing and supported by the pricing-adjustment methodology identified in the Contractor's quotation.