EVALUATION FACTORS
HVAC PREVENTATIVE MAINTENANCE
Standing Rock IHS Hospital - Ft. Yates, ND and YRTC - Wakpala, SD

BASIS FOR AWARD

- Award will be made using Lowest Price Technically Acceptable (LPTA) procedures.
- All non-price factors are rated Acceptable/Unacceptable only; no trade-offs will be made.
- A proposal must be Acceptable for every non-price factor to be eligible for award.
- The Government will evaluate price for fair and reasonable pricing.
- Award will be made to the lowest evaluated price offeror that is technically acceptable and responsible.
- The Government intends to award without discussions; initial proposals should be complete and include the offeror's best terms.

ACCEPTABLE / UNACCEPTABLE RATINGS

Rating	Evaluation Standard
ACCEPTABLE	Proposal clearly meets the minimum solicitation requirements and demonstrates an adequate understanding of the HVAC PM requirement.
UNACCEPTABLE	Proposal does not clearly meet the minimum requirements, fails to provide required information, or demonstrates an inadequate understanding of the requirement.

TECHNICAL FACTOR 1 - PAST PERFORMANCE

Definitions:
For this factor, **"recent"** means a past performance record that is either:

- Completed within three (3) years before the proposal due date;
- Ongoing within three (3) years before the proposal due date; or
- Reflected in a CPARS final assessment dated within three (3) years before the proposal due date.

For this factor, **"relevant"** means a past performance record that demonstrates experience with HVAC preventive maintenance, inspection, troubleshooting, repair, emergency response, or related mechanical systems maintenance for a commercial, institutional, healthcare, federal, tribal, or mission-critical facility.

Relevant past performance may include work on systems such as AHUs, boilers, chillers/condensing units, pumps, VAV boxes, BAS/controls, or JCI Metasys/comparable systems. A single past performance record may be used to satisfy more than one relevance requirement if it clearly demonstrates each applicable requirement.

Offeror Submittal Checklist:

☐ No submittal is required if recent and relevant CPARS are available for the offeror's SAM UEI.
☐ If no relevant CPARS are available, the offeror may submit PPQs or customer references.
☐ If relying on an affiliate, predecessor, subcontractor, or teaming partner, explain the relationship and how that entity will support this requirement.

Evaluation Checklist:

☐ Recent = ongoing, completed, or CPARS final assessment date within 3 years of the proposal due date.
☐ Relevant = HVAC preventive maintenance, inspection, troubleshooting, repair, or mechanical systems maintenance for commercial, institutional, healthcare, federal, tribal, or mission-critical facilities.
☐ Acceptable if recent/relevant CPARS or PPQs do not show one Unsatisfactory rating in any category or two or more Marginal ratings.
☐ Unknown past performance is considered Acceptable and is not evaluated favorably or unfavorably.

TECHNICAL FACTOR 2 - SPECIALIZED EXPERIENCE

For this factor, **"recent"** means a project that is either:

- Completed within seven years before the proposal due date; or
- Ongoing and at least 75% complete by the proposal due date.

For this factor, **"relevant"** means a project that demonstrates experience performing HVAC preventive maintenance, inspection, troubleshooting, repair, emergency response, or related mechanical system services for a commercial, institutional, healthcare, federal, tribal, or mission-critical facility.

Relevant experience may include work on systems such as AHUs, boilers, chillers/condensing units, pumps, VAV boxes, BAS/controls, or JCI Metasys/comparable systems. A single project may be used to satisfy more than one relevance requirement if it clearly demonstrates each applicable requirement.

Offeror Submittal Checklist:

☐ Submit at least two (2), but no more than five (5), relevant project examples.
☐ Each project must be at least 75% complete or completed within 7 years of the proposal due date.
☐ For each project, provide:
- Contract number, project title, and customer/agency name;
- Facility name, location, and facility type;
- Period of performance and contract value;
- Customer point of contact, phone number, and email address;
- Offeror role: prime, subcontractor, joint venture member, or other;
- Work self-performed and work subcontracted;
- Brief description of HVAC PM, inspection, troubleshooting, repair, emergency response, or mechanical services performed;
- Equipment/systems maintained, such as AHUs, boilers, chillers/condensing units, pumps, VAV boxes, BAS/controls, or JCI Metasys/comparable systems;
- Whether work occurred in a healthcare, occupied institutional, federal, tribal, or mission-critical facility;

☐ Submit one sample HVAC service report or inspection report showing how completed work was documented.

Evaluation Checklist:

☐ At least two (2) submitted projects are recent and relevant.
☐ At least one project shows HVAC preventive maintenance, inspection, troubleshooting, or repair of commercial/institutional mechanical systems.
☐ At least one project shows work in a healthcare, occupied institutional, federal, tribal, or mission-critical facility. The same project may be used to satisfy this requirement and the HVAC experience requirement above, if applicable.
☐ Submitted project information is specific enough to verify scope, role, value, dates, and customer reference.
☐ Sample service report shows the ability to document equipment inspected, work performed, service dates, technician information, and customer acknowledgment/sign-off, as applicable.

TECHNICAL FACTOR 3 - TECHNICAL / MANAGEMENT APPROACH

Offeror Submittal Checklist:

☐ Organization chart identifying the Project Manager, field lead or lead technician, emergency response contact, and any proposed subcontractor/team member roles.
☐ Preventive maintenance plan or schedule for the SOW equipment, including AHUs, boilers, chillers/condensing units, pumps, VAV boxes, BAS/controls, and related equipment.
☐ Emergency response plan showing how required response times will be met for Ft. Yates and Wakpala/YRTC, including dispatch process, primary/backup contacts, and technician availability.
☐ Staffing and subcontracting approach identifying what work will be self-performed and what work will be subcontracted.

☐ If subcontractors or teaming partners are proposed, provide a commitment letter or similar documentation identifying the firm, scope of work, and availability for this requirement.

☐ JCI Metasys/BAS capability documentation. At minimum, identify who will perform BAS work and provide one or more of the following:

- JCI Metasys or BAS training/certification/authorization;
- Recent project experience performing JCI Metasys or comparable BAS work;
- Resume or qualification summary for the BAS technician/company; or
- Other documentation showing capability to perform BAS verification, alarm/override review, backups, sensor calibration, and controls troubleshooting.

☐ Quality control and reporting approach, including how completed PM work, deficiencies, recommendations, and emergency calls will be documented and submitted to the COR/facility representative.

☐ Occupied-facility coordination approach, including advance notice, scheduling with facility staff, and minimizing disruption to patient care/treatment operations.

Note:

The key technical qualification to substantiate for this factor is JCI Metasys/BAS capability. Proof of certification or license may be provided for this factor. The contractor remains responsible for complying with all applicable laws, codes, permits, and SOW requirements during performance.

Evaluation Checklist:

☐ Approach is clear, realistic, and covers both locations.

☐ Approach addresses recurring PM, annual inspections, emergency response, documentation, and coordination with facility staff.

☐ Proposed staffing/subcontracting approach shows who will perform the required HVAC PM work.

☐ Subcontractor commitments are provided if the offeror relies on subcontractors/team members for key technical work.

☐ JCI Metasys/BAS capability is supported by training, certification, authorization, experience, resumes, or other reasonable documentation.

☐ Emergency response plan appears adequate to meet the SOW response requirements.

FACTOR 4 - PRICE

Offeror Submittal Checklist:

☐ Submit a completed Price Schedule Sheet.

☐ Price must include all labor, supervision, materials, tools, equipment, travel, subcontractor costs, overhead, profit, and all other costs necessary to perform the SOW.

Evaluation Checklist:

☐ Evaluate Total Evaluated Price (TEP) as the sum of the base period and all option periods/CLINs identified in the solicitation.

☐ Evaluate price for reasonableness using comparison to proposed prices, the IGE, historical pricing, or other FAR-permitted price analysis methods.

☐ An unreasonably high or unrealistically low price may indicate lack of understanding of the solicitation requirements and may result in the overall proposal being considered unacceptable.

INTENT TO AWARD WITHOUT DISCUSSIONS

- The Government intends to evaluate proposals and award without discussions.
- The Contracting Officer may conduct discussions if later determined necessary.
- If discussions are held, the Government may establish a competitive range in accordance with the solicitation and FAR requirements.