Proposal: HVAC Preventive Maintenance and Controls Support Services

Prepared for Oxford Preparatory School · Response to RFP issued February 23, 2026

Portfolio sample by Mike McCarthy. This answers a real, public RFP from Oxford Preparatory School (Oxford, NC). The respondent, Hartwell Mechanical, is fictional, and bracketed items are placeholders a real contractor would fill. It was not submitted.

The brief: Oxford Preparatory School, a K-12 charter school in North Carolina, wanted one contractor for quarterly HVAC maintenance at three buildings, 24/7 emergency service, and monitoring of its Trane building controls. Proposals were scored on company experience, school experience and technical approach (20% each), staffing and pricing (15% each), and controls expertise (10%).

Cover letter

April [date], 2026

Andrew Swanner, Executive Director
Oxford Preparatory School
6041B Landis Rd., Oxford, NC 27565

Dear Mr. Swanner,

Thank you for the opportunity to propose on HVAC preventive maintenance and controls support for Oxford Prep's Lower School, Upper School and Athletic Fieldhouse.

We understand what this contract is really for: classrooms that stay comfortable all year, a Lower School building automation system that is watched and tuned rather than left alone, and a contractor who works around the school day instead of through it. We have read the full RFP, accept its scope and terms, and confirm our interest in a one-year agreement with renewal options.

This proposal follows the ten sections in RFP Section 3.1. A compliance matrix after the executive summary shows where each requirement is answered.

Our pricing remains valid for 90 days from April 6, 2026. I am authorized to bind Hartwell Mechanical and am your single point of contact throughout.

Sincerely,

[Name], [Title]
Hartwell Mechanical · [phone] · [email]

Executive summary

Hartwell Mechanical will keep all three Oxford Prep buildings running through four planned visits a year, a guaranteed emergency response, and around-the-clock monitoring of the Lower School's Trane Tracer SC+ system. Here is how we meet each of the committee's scoring criteria:

Criterion (weight)	What we offer
Company qualifications (20%)	**[] years serving commercial and institutional buildings; []** full-time HVAC technicians; fully licensed, insured and bonded.
K-12 experience and references (20%)	[__] current school clients, including [similar-size school]; three references with direct contacts.
Technical approach (20%)	Quarterly visits timed to the school calendar, seasonal checklists, photo-documented reports after every visit.
Staffing (15%)	One named account manager, one lead technician per campus, and a named backup for each.
Controls expertise (10%)	Trane-trained technicians and remote access to Tracer SC+ for monitoring, alarms and schedule changes.
Pricing and value (15%)	Fixed annual PM and controls fees per building, published repair rates, no surprise charges.

The result for Oxford Prep: fewer breakdowns during the school day, one accountable team, and clear records the Board Facilities Committee can use to plan equipment replacement.

Compliance matrix

Every item RFP Section 3.1 asks for is answered below or attached.

RFP requirement	Where it's answered
1. Cover letter and executive summary	Cover letter; Executive summary
2. Company qualifications and experience	Executive summary; Attachment A (licences, insurance, bonding, references)

RFP requirement	Where it's answered
3. Experience with educational facilities	Executive summary; Attachment B (school client list)
4. Technical approach	Technical approach
5. Controls expertise	Controls expertise
6. Staffing plan	Staffing and service levels
7. Service level commitments	Staffing and service levels
8. Pricing proposal	Pricing
9. Contract terms	Cover letter; Questions for the school
10. Additional information	Technical approach (equipment replacement planning)
EPA 608 certificates, business licences, certificate of insurance, manufacturer authorizations	Attachments C–F

Technical approach

We plan the year around the school calendar, not the other way round.

Preventive maintenance: four visits a year at each building

Visit	Timing	Focus
Spring	Late April	Cooling start-up: coil cleaning, refrigerant charge, compressors, capacitors, condensate drains
Summer	Late July, before staff return	Full inspection while buildings are quiet; filters and annual belt changes
Fall	Late October	Heating start-up: heat pump defrost, auxiliary heat, gas valves, heat exchangers, flues, limit switches
Winter	During the December break	Mid-season check; filters; findings for the annual report

Every rooftop unit, split system, heat pump, air handler and exhaust fan is checked against a written seasonal list. Work in occupied buildings is scheduled before 7:00 AM or after dismissal, and technicians check in at the front office every visit.

Emergency response

- 24/7 phone line answered by a person, not a voicemail.
- On site within 4 hours on school days (7:00 AM–5:00 PM, Monday to Friday) and within 8 hours after hours.
- Priority dispatch during heat waves and cold snaps, when a failed unit can close a classroom.

Reporting

- A service report within 48 hours of each visit, with photos of anything significant.
- An equipment inventory with condition ratings, built in the first visit and updated every quarter.
- An annual report ranking each unit by remaining life, so the Board can budget for replacements before they fail.

Controls expertise

The Lower School's Trane Tracer SC+ system is only as good as the way it's watched and programmed. We will:

- **Monitor it 24/7** through secure remote access, with alarms routed to an on-call technician, not just logged.
- **Program it to the school year:** holidays, breaks, early dismissals, evening events and summer setbacks entered at the start of each term and updated within one business day of a request.
- **Visit quarterly** to calibrate sensors, apply software updates, and fix anything trending the wrong way.
- **Report twice a year** on alarm history, uptime and energy use, with specific changes that would cut costs.
- **Train your staff** on everyday adjustments, and keep a written record of all programming so nothing lives only in one technician's head.

Our controls technicians hold [Trane certification / training details]. We will extend the same monitoring to the Fieldhouse once we confirm what controls it has (see Questions for the school).

Staffing and service levels

Oxford Prep gets the same small team every visit, so they learn the buildings and the people.

Role	Name	Responsibility
Account manager	[Name]	Single point of contact, scheduling, reports, invoicing

Role	Name	Responsibility
Lead technician, Lower School and Fieldhouse	[Name, certifications]	PM visits, Tracer SC+ support
Lead technician, Upper School	[Name, certifications]	PM visits, emergency calls
Backup technicians	[Names]	Cover vacations, sick days and peak emergencies

All technicians hold EPA 608 certification, pass criminal background checks before working on school property, and complete [__] hours of training a year.

Our commitments

Service	Commitment
PM visits	4 per building per year, scheduled 30 days ahead
Emergency response, school hours	On site within 4 hours
Emergency response, after hours and weekends	On site within 8 hours
Visit reports	Within 48 hours
Controls schedule changes	Within 1 business day
Controls reports	Twice a year, plus an annual assessment

If we miss a response commitment, [the next PM visit for that building is credited at 10%], a guarantee the committee can hold us to.

Pricing

Fixed annual fees cover all planned work, so Oxford Prep knows its maintenance cost up front.

Service	Annual fee
PM, Lower School (38,000 sq ft), 4 visits	[amount]
PM, Upper School (45,000 sq ft), 4 visits	[amount]
PM, Athletic Fieldhouse (3,000 sq ft), 4 visits	[amount]

Service	Annual fee
Controls support, Lower School: 24/7 monitoring, quarterly visits, schedule changes, alarm response	[amount]
Total annual fixed fee	**[amount]**

Additional rates	Rate
Repairs, school hours	[amount] per hour
Emergency, after hours and weekends	[amount] per hour
Parts markup	[__]%
Refrigerant (R-410A / R-454B)	[amount] per lb
Travel	Included

Quarterly filters, annual belts and coil-cleaning materials are included in the PM fees, as the RFP requires. Pricing is valid for 90 days; renewal-year increases are capped at [__]%. Terms are net 30, with PM billed quarterly and controls billed monthly.

Questions for the school

We would submit these by the March 18 deadline, because each affects price or scope:

1. **Contract length:** Section 6.1 sets a one-year term with renewals, but Section 9 invites 1-, 3- or 5-year proposals. Which should we price?
2. **Fieldhouse controls:** Section 2.2 includes the Fieldhouse, but only the Lower School's Tracer SC+ is described. What controls does the Fieldhouse use?
3. **Site visit:** No date is given for the pre-proposal walkthrough. When can we schedule it with Mr. Evans?