



ARKANSAS SCHOOL
FOR MATH, SCIENCES, + THE ARTS

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Financial Proposal Packet
ASMSA FB-27001
HVAC Maintenance, Monitoring, and Related Services

CAUTION TO SUPPLIER

Supplier's failure to submit required items and/or information as specified in the solicitation may result in disqualification.

Financial Proposal Instructions

Provide a complete and transparent breakdown of all costs associated with the proposed services.

For purposes of evaluating the cost component of this RFP, ASMSA will use the Total Base Price for the required base level of services over the Initial Contract Term. The Base Price shall include the full cost of providing all services identified as required for inclusion in the Base Price.

Suppliers shall reference the Solicitation, specifically Section 2 – Requirements & Specifications, for further details regarding the scope, specifications, performance expectations, and requirements applicable to each component of the required base level of service. These requirements shall serve as the basis for calculating the Base Price for the Initial Contract Term, as reflected in the Financial Summary in Section 10 of this Financial Proposal Packet.

The Financial Proposal shall clearly distinguish between costs included in the Base Price and rates or charges applicable only to services, materials, or other costs expressly permitted outside the Base Price.

Include all requested fees, rates, markups, recurring charges, non-recurring charges, assumptions, exclusions, and other financial information necessary for ASMSA to understand the proposed pricing structure and potential costs under the Contract.

Pricing, rates, markups, fees, and other financial information shall be provided only in this Financial Proposal Packet and shall not be included in the Information for Evaluation sections.

All costs necessary to provide the required base level of services shall be included in the Base Price. Pricing provided elsewhere in this Financial Proposal Packet shall not be used to exclude, separately charge for, or otherwise reduce services required to be included in the Base Price.

Any costs identified outside the Base Price shall be clearly described, including the circumstances under which the cost may apply and the basis upon which it will be charged.

All pricing shall be provided in U.S. dollars.

1. Base Contract Price

Mandatory Requirements – Included in Base Price

The Contractor's **Base Price** shall include all labor, supervision, equipment, tools, materials, supplies, consumables, transportation, and other costs necessary to provide the services identified below.

All services listed below are required and shall be included in the Base Price. These services are not optional, additional, or separately priced services. See **Section 2 – Requirements & Specifications** of the solicitation document (ASMSA FB-01-27 HVAC Maintenance, Monitoring, and Related Services) for details for scope of services required relating to each of the following required services.

1. **On-site HVAC/R staffing**
2. **Preventive maintenance**
3. **Routine service calls**
4. **Routine troubleshooting and diagnostics**
5. **Routine corrective maintenance**
6. **Filters and routine consumables**
7. **Refrigerant service* (not including cost of refrigerant)**
8. **Routine controls support**
9. **Remote monitoring**
10. **Alarm management**
11. **Equipment inspections**
12. **Testing and calibration**
13. **Service documentation and reporting**
14. **Minor HVAC-related electrical work**
15. **Minor HVAC-related plumbing work**

Base Price Requirement: The Contractor shall include the full cost of providing each service listed above in its Base Price. No separate, supplemental, or additional charges will be permitted for these required services. Base Price Structure should be represented by Fixed Annual Fee in addition to the Detailed Base Price Cost Breakout provided below.

Detailed Base Price Cost Breakout

The Contractor shall allocate its total Base Price among the categories below. **All services identified within each category are required and shall be included in the Base Price.** The breakout is for pricing transparency and evaluation purposes and does not modify or limit the Contractor's scope of services.

Cost Category	Required Services Included	Annual Cost
1. On-Site Staffing & HVAC Service/Support	All HVAC/R staffing, labor, maintenance, repairs, and diagnostics, excluding filters and routine consumables.	\$ _____
2. Consumables/Materials	Filters and routine consumables	\$ _____
3. Controls, Monitoring & Reporting	Controls support; Remote monitoring; Alarm management; Service documentation and reporting (technology)	\$ _____
4. Administrative Costs	Any and all admin. associated costs not included in cost categories above	\$ _____
	TOTAL BASE PRICE	\$ _____

Cost Breakout Requirement: The sum of Categories 1 through 4 shall equal the Contractor's Total Base Price. The allocation of costs among categories is for cost transparency and contract administration and shall not be construed as establishing separate or optional services. **All services listed above are required and included in the Total Base Price.**

Total Base Price Schedule

Contract Year	Base Contract Price
Year 1	\$ _____
Year 2	\$ _____
Total Initial Contract Term	\$ _____
Year 3, if applicable	\$ _____
Year 4, if applicable	\$ _____
Year 5, if applicable	\$ _____

If the proposed base price changes during the contract term, explain the reason and methodology for the change in Section 9.

2. Standard Labor and Service Rates

Provide the rates that apply to services outside the base contract price or otherwise authorized separately by ASMSA.

Service / Personnel Classification	Unit	Regular Rate	After-Hours Rate	Emergency Rate	Holiday Rate
HVAC/R Technician	Hour	\$	\$	\$	\$
Senior / Lead Technician	Hour	\$	\$	\$	\$
Controls Technician	Hour	\$	\$	\$	\$
Engineer / Specialist	Hour	\$	\$	\$	\$
Other: _____	Hour	\$	\$	\$	\$
Service / Trip Charge	Trip	\$	\$	\$	\$
Diagnostic Charge	Service	\$	\$	\$	\$

Define the applicable hours and circumstances for each rate.

Regular Hours: _____

After-Hours: _____

Emergency: _____

Holiday: _____

Minimum Labor or Service Charge, if applicable:

3. Parts, Materials, Equipment, and Subcontractor Pricing

Provide the proposed markup or pricing methodology for costs outside the base contract price.

Category	Pricing Basis (Actual Acquisition Cost, Manufacturer/List Price, Catalogue Price, or Other Basis)	Markup	Other Fee(s)
HVAC/R parts		%	
Electrical components		%	
Controls components		%	
Refrigerant		%	
Motors		%	
Other materials		%	
Subcontractor services		%	

Clarification of Other Pricing Basis, if applicable:

Additional Material or Equipment Fees:

Minimum Material or Equipment Charge, if applicable:

4. Emergency and After-Hours Pricing

Identify all charges that may apply to emergency, after-hours, weekend, or holiday service, **not included in base price**.

Charge	Rate / Amount	When It Applies
Emergency dispatch	\$	
Emergency labor	\$	
After-hours labor premium	\$	
Weekend labor premium	\$	
Holiday labor premium	\$	
Emergency trip/service charge	\$	
Other: _____	\$	

Identify any emergency or after-hours charges already included in the base contract price.

5. Technology, Controls, Monitoring, and Recurring Charges

Provide detailed analysis of costs associated with technology required by the proposed solution **included in the Base Price schedule**.

Technology / Service	One-Time Cost	Recurring Cost
Software	\$	\$
Licensing	\$	\$
Monitoring	\$	\$
Subscription	\$	\$
Hardware	\$	\$
Cloud services	\$	\$
Support / maintenance	\$	\$
Other: _____	\$	\$

Identify any required proprietary systems, third-party technology, licenses, subscriptions, or other recurring commitments.

Identify any expected renewal or price-adjustment provisions associated with these costs.

6. Standard Pricing Scenario

To support a consistent comparison of pricing models, suppliers should calculate the cost of the following standardized service scenario using the rates and markups provided in this Financial Proposal Packet.

Pricing Scenario

For comparison purposes, assume the following services are required during one contract year:

Service	Assumed Quantity	Supplier Price	Extended Cost
After-hours technician labor	100 hours	\$/hour	\$
Emergency technician labor	50 hours	\$/hour	\$
Emergency service calls	10 calls	\$/call	\$
Refrigerant (R-134A)	500 lbs.	\$/lb.	\$
Parts / materials	\$1,000	Markup: ____%	\$
Subcontracted services	\$500	Markup: ____%	\$
Total Scenario Cost			\$

Important: The pricing scenario is provided solely to establish a consistent basis for comparing supplier pricing models. It does not represent a guaranteed volume of work, minimum purchase, or forecast of actual ASMSA expenditures.

If the supplier's pricing methodology differs from the assumptions above, explain the methodology below.

Pricing Scenario Assumptions / Explanation:

7. Optional and Additional Services

Provide pricing for services that are not included in the proposed base contract price but may be requested by ASMSA.

Optional / Additional Service	Unit	Unit Price	Labor Included?	Materials Included?
Additional preventive maintenance		\$	☐ Yes ☐ No	☐ Yes ☐ No
Additional Controls programming		\$	☐ Yes ☐ No	☐ Yes ☐ No
Energy assessment		\$	☐ Yes ☐ No	☐ Yes ☐ No
Major repair		\$	☐ Yes ☐ No	☐ Yes ☐ No
Equipment replacement support		\$	☐ Yes ☐ No	☐ Yes ☐ No

Optional / Additional Service	Unit	Unit Price	Labor Included?	Materials Included?
Other: _____		\$	☐ Yes ☐ No	☐ Yes ☐ No

Additional services and recommendations should correspond with the supplier's Recommended Options Form, where applicable.

8. Price Adjustments

Identify any proposed adjustments to pricing during the contract term.

Adjustment Frequency:

Adjustment Methodology / Index:

Maximum Adjustment, if applicable:

First Eligible Adjustment:

If no adjustment is proposed, indicate "None."

9. Assumptions and Exclusions

Identify assumptions, exclusions, conditions, or other circumstances that may affect the proposed pricing.

Assumptions

Exclusions

Other Conditions Affecting Pricing

10. Financial Summary

Provide a summary of the proposed pricing for ease of comparison. (Initial Contract Term is Years 1 & 2. Please also provide Years 3-5 for additional context.)

Cost Category	Year 1	Year 2	Year 3 (If Applicable)	Year 4 (If Applicable)	Year 5 (If Applicable)
Base Contract Price	\$	\$	\$	\$	\$
Total Initial Contract Term		\$			
Optional and Additional Services	\$	\$	\$	\$	\$

Initial Contract Term (Years 1-2): \$_____

11. Financial Proposal Certification

By submitting this Financial Proposal Packet, the supplier confirms that the information provided represents its complete proposed pricing for the services described in the solicitation. The supplier confirms that applicable fees, rates, markups, recurring charges, assumptions, and exclusions have been identified and that the pricing provided is consistent with the supplier's proposed solution and scope of services.

Supplier Name: _____

Authorized Representative: _____

Title: _____

Signature: _____

Date: _____