

Bid Package Review

Tomball ISD RFP #1000-26: New HVAC System at Lakewood and Willow Creek Elementary Schools

This is a sample of what Addenda Desk delivers for each bid package. A 58-page RFP is reduced to a snapshot, key dates, flags, a scope checklist, a requirements matrix and a forms checklist, with every item tied to its page so you can check it in seconds. It was built from a public package, [Tomball ISD RFP #1000-26](#), whose bid date has passed. It was not prepared for a client, and Addenda Desk has no connection to the district or to any bidder.

Bid snapshot

A competitive sealed proposal to replace four air-cooled chillers at two elementary schools, with an owner estimate of \$770,000 and price worth only 25 of 100 points.

Item	What the RFP says	Page
Owner	Tomball Independent School District	3
Procurement method	Competitive sealed proposal, Texas Government Code § 2269, Subchapter D	3
Sites	Lakewood ES and Willow Creek ES, Tomball, TX 77377	3
Owner's estimated cost	\$770,000, including a \$70,000 owner's contingency	4
Substantial completion	July 17, 2027	4, 7, 25
Contract form	AIA A101-2017 and A201-2017, as amended by the owner	22
Bid bond	5% of the proposal, from a surety licensed in Texas	29
Proposal validity	60 days for the base proposal, 120 days for alternates	24
Contract execution	Within 10 days after the documents are presented	24
Permit timing	About 90 calendar days from submission to permit release (an estimate; work can be required to start sooner, see below)	25
Allowances	Contractor allowances are not allowed; owner-requested allowances in the specifications are included in the base proposal	5, 25
Delivery	Sealed package, in person, to the CFO at 1110 Baker Dr, Tomball. No fax or email.	5, 7

Key dates

The first deadline falls a week after posting: references are due before the pre-proposal conference.

Date and time	Event	Page
May 18, 2026	RFP posted	6
May 25, 2026, 1:00 PM	List of references due to Chelsea Randle at LAN, the program manager's firm	6
May 26, 2026, 11:00 AM	Pre-proposal conference at 1110 Baker Drive (optional); a site visit may follow	6
June 1, 2026, 12:00 PM	Deadline for questions	6
June 4, 2026, 2:00 PM	Final addendum posted	7
June 9, 2026, 2:00 PM	Proposals due. Late proposals are returned unopened.	7

Date and time	Event	Page
August 11, 2026, 5:00 PM	Anticipated Board of Trustees approval	7
About August 21, 2026	Notice to proceed	7
July 17, 2027, 11:59 PM	Substantial completion	7

Flags to raise before bidding

Thirteen items need a question to the owner or a decision by the estimator. The first five affect price or compliance directly.

#	Flag	Why it matters	Page
1	Liquidated damages and warranty terms are not stated in the RFP	They are likely in the amended AIA documents, which are separate files not reviewed here. Confirm them before pricing.	57–58
2	Insurance types and limits are not stated	Exhibit G asks for proof of insurability meeting the contract's requirements. Confirm coverage types and limits in the contract files before pricing insurance.	35
3	Performance and payment bond amounts are not stated	Only the requirement is given. Confirm the required bond amounts before pricing them.	29
4	Pump scope is ambiguous: "Replace 2 chilled water pumps as an alternate; potentially 4 pumps"	The alternate could double. Ask which alternate line covers pumps 3 and 4.	3
5	General scope list names 15 categories, including site utilities, paving, and fire detection and alarm	The stated work is chiller replacement. Ask in writing before the June 1 question deadline so an addendum settles which apply. Exhibit J is not for scope deviations (p. 39).	4
6	Form 1295 instructions cite "RFQ #987-25"	This solicitation is RFP #1000-26. A wrong number on a filed ethics form could make the proposal non-responsive.	44
7	Table of Awarded Points has no band for 14.01% to 15% above low bid	The price score is undefined in that range.	21–22
8	Exhibit C is titled for unit prices but lists none	Confirm whether unit prices are required.	28
9	Submission instructions are inconsistent: the Exhibit B (Key Subcontractors) page is marked "Submit with Part 2" while all others say Part 1, and Tab E (p. 9) asks for "Three (2) copies" plus one original	The RFP describes a one-part process, and the number of copies is unclear.	5, 9, 27
10	Prevailing wage rate pages have no machine-readable text	Exhibit U needs a manual read before labor is priced.	54–56
11	Chiller capacities are not in the RFP	Check the drawings and specifications (separate files, not reviewed here) for tonnage and performance data.	3
12	Conflict of interest exhibit lists trustees as placeholders ("Name 1" to "Name 7")	The questionnaire cannot be completed accurately without the names.	52
13	Section II refers to "RFQ section III", and Exhibit L (p. 42) refers to a "Request for Qualifications"	Minor, but shows the document was adapted from another solicitation, so other carry-over errors are likely.	5

Scope checklist

Base scope is four chillers with piping, rails and control wiring; pumps and manufacturer options are priced as alternates.

- ☐ Replace 2 existing air-cooled chillers at Lakewood ES (p. 3)
- ☐ Replace 2 existing air-cooled chillers at Willow Creek ES (p. 3)
- ☐ Modify piping and housekeeping rails as required (p. 3)
- ☐ Replace control wiring from the control panel to the chillers (p. 3)
- ☐ Price chillers as alternates by manufacturer: Trane, York, Carrier (p. 3)
- ☐ Cover both compressor types named: screw and scroll (p. 3)
- ☐ Price replacement of 2 chilled water pumps as an alternate, "potentially 4" (p. 3)
- ☐ Give a price and a lead time in weeks for each of the 14 alternate lines: 01A, 01B, 02A, 02B, 03A, 03B, 04, 05A, 05B, 06A, 06B, 07A, 07B, 08 (p. 26)
- ☐ List the top three subcontractors or vendors per category, each with an all-inclusive add or deduct price (p. 27)
- ☐ State the base proposal as a lump sum in words and figures; words govern (p. 25)
- ☐ Acknowledge each addendum by date on the proposal form (p. 25)
- ☐ Visit the site; the owner may reject claims based on lack of inspection (p. 24)

Requirements matrix

The submission is one bound original in five tabs plus a flash drive, and most of the effort is in Tab A.

Tab	Requirement	Page
Format	8½" × 11" single-sided sheets, coil or three-ring bound, one executed original	8
Format	One flash drive with a PDF of the full proposal and the completed Excel file in native format	10
Format	Section numbers on every response item. No blanks anywhere in the questionnaire.	10, 11
A	Letter of interest	11
A	Executive summary: qualifications and how the respondent meets the evaluation criteria	11
A	Firm information and organization: business form, years in business, principals	12
A	Project experience by year, 2021 to 2025: total value, Texas value, Harris-area share, K-12 share, staff count, largest contract	12–13
A	Completed K-12 projects in Texas in the last 36 months	13
A	Reference survey on the owner's Excel file; data on each completed project, including change orders, RFIs and claims	14–15
A	Up to five similar current projects on an 11×17 Excel table	15
A	Claims, suits and failure-to-perform disclosures; own-forces work	16
A	Safety: OSHA logs for three years, insurer loss analysis, loss history	16
A	Organization chart; project manager and superintendent with experience and last three assignments	16–17
A	Five letters of recommendation from Texas K-12 district customers	17

Tab	Requirement	Page
B	Audited financial statements, bank reference, bonding company and available capacity. May go in a separate sealed envelope marked "CONFIDENTIAL – FINANCIALS".	8, 18
C	Bid forms: Exhibits A, B and C	8
D	All remaining exhibits. Objections to the AIA contract go on Exhibit J.	9
E	Additional information. The copy count is unclear in the RFP (see flag 9).	9
Rule	If LAN was the program manager on a reference project, do not list LAN as the owner's primary contact (pp. 14–15)	15
Rule	No promoting your firm or proposal to trustees, administration or staff from release to award, except as requested in writing by the named point of contact; violation may disqualify	19
Rule	Confidentiality claims must be made page by page and line by line	10

Forms checklist

Twenty exhibits must be completed; six depend on outside parties or an online filing, so they should start first.

Exhibit	Form	What it needs	Page
A	Proposal form	Lump sum, addenda dates, 14 alternates with lead times, company block, signature	24–26
B	Key subcontractors	Top three per category with add or deduct prices	27
C	Bid alternates and unit prices	Refers back to Exhibit A	28
D	Bid bond	5% bond or certified check; surety signature, corporate seals, power of attorney attached	29–31
E	Felony conviction notification	Choose one of three options; official's signature	32–33
F	Non-collusion acknowledgment	Respondent and company official signatures	34
G	Proof of insurability	Letter or sample certificates from the insurer	35
H	Proof of bonding capacity	Letter from the bonding agent: limit, current obligations, free capacity	36
I	Signature page and declaration of compliance	Business structure, tax IDs, board resolution if a corporation	37–38
J	Deviations and exceptions	Must be signed and submitted even if blank	39–40
K	Certificate of residency	Resident or non-resident bidder; signature	41
L	Debarment and suspension statement	Signature	42
M	Taxpayer identification	IRS Form W-9	43
N	Form 1295, certificate of interested parties	Filed online with the Texas Ethics Commission, printed with its certification number, signed	44–45
O	Terrorist organizations and Israel boycott certification	Signature	46
P	Energy company boycott certification	Signature	47

Exhibit	Form	What it needs	Page
Q	Firearm industry discrimination certification	Signature	48
R	Foreign-owned companies and critical infrastructure	Signature	49–50
S	Antitrust certification	Signed under penalty of perjury	51
T	Conflict of interest questionnaire	Required whether or not a conflict exists; p. 53 is the Ethics Commission's statute text, as a scanned image	52–53
U	Prevailing wage rates	Reference only; read manually	54–56
V, W	AIA A101-2017 and A201-2017	Not submitted. Review and record objections on Exhibit J.	57–58

Start on day one. To request from others: bid bond and power of attorney (D), insurer letter (G), bonding capacity letter (H), five recommendation letters and audited financials (Tabs A and B). To file online: Form 1295 (N).

How the proposal is scored

Price is a quarter of the score; references carry the same weight, and the references list is due 15 days before proposals are due.

Criterion	Points	Page
Proposed amount (base plus owner-selected alternates)	25	20
Reference survey	25	20
History of company performance	15	20
Similar company project experience	10	20
Similar personnel project experience	10	21
Proposed equipment performance	5	20
Financial stability	5	21
Prior positive experience with the owner	5	21

- Price points fall quickly: a proposal 3.9% to 4.15% above the low bid earns 77.5% of the price points, one 10.25% to 11% above earns 18.25%, and one more than 19% above earns 0.75% (pp. 21–22). The table skips 14.01% to 15% (flag 7).
- With four or fewer reference responses, the reference score is reduced by 20% for each missing response below five, so five responses are needed for full credit. A floor of 20% of the points applies (p. 20).
- A respondent with no prior work for the owner starts with 2.5 of 5 points (p. 21).

Award and contract terms that affect price

Six provisions affect price, compliance or risk; most are easy to miss because they sit in boilerplate.

Term	What the RFP says	Page
Work before the permit	The owner may issue notice to proceed before the permit is released, and the contractor must start submittals, mobilization and subcontractor buyout	25
Unit prices set change orders	Unit prices, if requested, include overhead and are used to price change orders for quantity changes	24
Owner picks your subs	Of the three subcontractors or vendors listed per category, the owner may select any one or discard all	27
Prices are read aloud	Bidder names, prices and alternates are read publicly at the opening; ranking follows within 45 days	7
Partial award	The owner may accept any submission in whole or in part	22
Questions go to different people	RFP questions go to the program manager, John Carey (LAN); contract-document questions go to the Architect, Adam Jones, PE; the references list goes to Chelsea Randle (LAN)	5, 6

Addenda tracker

No addenda were reviewed for this sample. Only addenda posted on the owner's website are official (p. 6).

Addendum	Date issued	What changed	Acknowledged on Exhibit A
1			
2			
3			
4			
5			

The proposal form has acknowledgment lines for Addenda 1 through 5 (p. 25). The final addendum was scheduled for June 4, 2026, 2:00 PM (p. 7).

Draft letter of interest

A first draft for Tab A, for a firm bidding as prime contractor. Bracketed items are for the contractor to supply.

[Date]

Mr. Zachery Boles, Chief Financial Officer
Tomball Independent School District
1110 Baker Drive, Tomball, TX 77375

Re: RFP #1000-26, New HVAC System at Lakewood and Willow Creek Elementary Schools

[Company name] submits this proposal to replace the four air-cooled chillers at Lakewood and Willow Creek Elementary Schools, with the associated piping, housekeeping rails and control wiring work, and to reach substantial completion by July 17, 2027.

We have [number] years of commercial mechanical experience in the Harris County area and have completed [number] K-12 projects in Texas in the last 36 months, including [project names]. Our proposed project manager, [name], and superintendent, [name], led [similar project].

Our proposal includes the base lump sum, all 14 alternates with lead times, and our key subcontractors as requested in Exhibits A and B. We have visited both sites [visit before signing; see p. 24], acknowledge Addenda [numbers and dates], and take [no exceptions / the exceptions listed on Exhibit J] to the contract documents.

This proposal remains open for 60 days; alternates remain open for 120 days.

[Signature, printed name, title]

How this sample was made, and its limits

- It covers the 58-page RFP only. The drawings, technical specifications, amended AIA contract files and any addenda are separate files and were not reviewed. On a live bid, all of them are included.
- The first pass was drafted with AI. Two independent AI checkers then each tested all 110 statements against the machine-readable text of the source PDF. Every item questioned by either checker was re-read against the page and corrected where needed. Both checkers then looked for anything missing, which added the award and contract terms section. The one page reference the checkers disagreed on was settled by extracting the PDF text directly. Every client package also gets a human review before delivery.
- Pages 53 to 56 of the RFP are scanned images with no machine-readable text. Page 53, the Ethics Commission's statute text for Exhibit T, was read visually. The Exhibit U wage tables (pp. 54–56) were not reviewed; flag 10 covers them.
- No takeoff, pricing or engineering judgment is included. You keep control of the estimate and the final submission, and the page references are there so you can verify anything before you rely on it.

Want this for your next bid?

Send the full package (front end, specifications, drawings and addenda so far) with the bid date. If it reaches us by noon Central Time, the review is back by 5:00 PM Central the next business day (packages over 500 pages: timing agreed before we start).

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