



## District School Board of Pasco County

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638 • 813/ 794-2000

Heather Fiorentino, Superintendent

[www.pasco.k12.fl.us](http://www.pasco.k12.fl.us)

Department of Purchasing  
Kendra Goodman, CPPO, CPPB, Purchasing Agent  
813/ 794-2221 Fax: 813/ 794-2111  
727/ 774-2221 TDD: 813/ 794-2484  
352/ 524-2221 e-mail: [kgoodman@pasco.k12.fl.us](mailto:kgoodman@pasco.k12.fl.us)

April 17, 2012

### MEMORANDUM

TO: Honorable School Board Members

FROM: Kendra Goodman, CPPO, CPPB, Purchasing Agent *KDG*

RE: RFP #11-067-AF HVAC Factory Chiller Services  
Second Year Renewal of a Three-Year Contract  
Cortez Heating & Air Conditioning, Inc.  
McQuay International

On September 6, 2011, official action (attached) was taken to award Part I of the above-referenced RFP for HVAC Factory Chiller Services to Cortez Heating & Air Conditioning, Inc. for the manufacturer Trane and to McQuay International for the manufacturer McQuay. On December 6, 2011, official action, Part II, was taken to reject the remaining proposal under evaluation for the manufacturer Carrier for the above-referenced RFP for HVAC Factory Chiller Services. This RFP is a three-year contract, renewable annually based upon mutual consent of the parties. The first year of the agreement will expire on April 19, 2012.

Considering services have been satisfactory, Daniel Snider, Vice President, Cortez Heating & Air Conditioning, Inc. and Michael Best, Service Operations Manager, were contacted to determine their willingness to enter into the second year of the agreement. As such, they have agreed in writing (attached) to enter into the second year of the agreement.

It is my recommendation at this time to enter into the second year of the agreement with the vendors noted above. The second year of the contract will cover the period of April 20, 2012 through April 19, 2013. Should you have any questions regarding this matter, or if I can be of further assistance, please feel free to contact me at your earliest convenience.

KDG/acf  
Attachments

Date/Time: April 11, 2012 09:20:00



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March 19, 2012

## BID RENEWAL REQUEST

**BID #: 11-067-AF**

**BID TITLE: HVAC Factory Chiller Services**

☒ Yes, I agree to renew for the second year of a three year agreement for **11-069-AF** under the same terms and conditions for the period of **April 20, 2012** and expire on **April 19, 2013**.

☐ No, I do not agree to renew **11-067-AF**

Company Name: Cortez Heating & Air Conditioning, Inc.

Signature: D Snider Date: 3/28/12

Typed Name and Title: VP Industrial

Telephone (w/area code): 1-866-755-5211 Fax Number (w/area code): 941-758-4210 or dancortezac@mac.com

**DATE DUE: PLEASE FAX TO PURCHASING NO LATER THAN MONDAY, MARCH 26, 2012.**

By agreeing to renew, vendor acknowledges and agrees to be in compliance with the "Jessica Lunsford Act". Vendors conducting business, with the District School Board of Pasco County, who will (1) be at the school when students are present, or (2) have direct contact with students, or (3) have access to or control of school funds **must** be Level 2 fingerprinted by Human Resources. If any of the above applies to this contract, you **must** have those individuals Level 2 fingerprinted and screened by the Districts Human Resource Department **prior** to commencement of services or work and must provide a list of employees with renewal. Please contact 813/794-2521 to arrange for an appointment. Costs associated with this background screening are to borne by the vendor. You may access information regarding this law through the internet link: [http://election.dos.state.fl.us/laws/051laws/ch\\_2005-028.pdf](http://election.dos.state.fl.us/laws/051laws/ch_2005-028.pdf). This law became effective September 1, 2005.

The prospective bidder certifies, by submission and signature of this bid renewal form, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of Florida Statute 287.133(2)(a).

PLEASE RETURN TO: DISTRICT SCHOOL BOARD OF PASCO COUNTY  
ATTN: Deb Mateo, Buyer Assistant  
PURCHASING DEPARTMENT  
20430 GATOR LANE  
LAND O' LAKES, FL 34638  
(813) 794-2227 (PHONE) (813) 794-2111 (FAX)





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March 19, 2012

### BID RENEWAL REQUEST

BID #: 11-067-AF

**BID TITLE: HVAC Factory Chiller Services**

☒ Yes, I agree to renew for the second year of a three year agreement for 11-069-AF under the same terms and conditions for the period of April 20, 2012 and expire on April 19, 2013.

☐ No, I do not agree to renew 11-067-AF

Company Name: McQuay International

Signature: Michael Best Date: 3/28/2012

Typed Name and Title: Michael Best Service Operations Manager

Telephone (w/area code): 813-621-8440 Number (w/area code): 813-621-6979 or [michelle.neal@mcquay.com](mailto:michelle.neal@mcquay.com)

DATE DUE: PLEASE FAX TO PURCHASING NO LATER THAN MONDAY, MARCH 26, 2012.

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|                                |  |  |  |                            |
|--------------------------------|--|--|--|----------------------------|
| <b>RFP Title</b>               | HVAC Factory Chiller Services – Part I |  | <b>Number of Vendors Notified</b>      | 561                        |
| <b>RFP Number</b>              | 11-067-AF                              |  | <b>Number of RFPs Distributed</b>      | 30                         |
| <b>Date Solicited</b>          | February 18, 2011                      |  | <b>Number of Vendors Proposing</b>     | 3                          |
| <b>Date Opened</b>             | March 10, 2011                         |  | <b>Number of Vendors Not Proposing</b> | 0                          |
| <b>Date Board Presentation</b> | September 6, 2011                      |  | <b>Funding Source</b>                  | Capital                    |
| <b>Total Savings</b>           | N/A                                    |  | <b>Grand Total of RFP</b>              | <b>Estimated \$150,000</b> |

**Recommendation:**

Recommend acceptance of RFP from vendors as noted on the attached RFP tabulation sheet, as the highest average score and best RFP meeting written specifications.

**Term of Contract:**

The intent of this proposal is to establish a three-year contract between the District School Board of Pasco County and a contractor/supplier for each respective chiller brand on an “as needed” basis for Carrier, McQuay, and Trane chillers for factory services, labor, repairs and OEM replacement parts (Carrier and Trane OEM parts excluded as they are provided under a previously existing contract) during the contract period. This contract will commence upon Board approval and shall remain in effect through April 19, 2012.

**Notations and Exceptions:**

Each RFP was evaluated according to the criteria outlined in the specifications, with individual scores totaled and averaged to obtain the respondent with the highest average scores. Copies of the evaluation forms are on file in the Purchasing Department.

Recommend rejection of the proposal submitted by Carrier Corporation as the vendor received a referenced totaling an average of below a three (3). The RFP states that any reference totaling an average of below a three (3) would result in the proposer’s disqualification from the RFP process.

Recommend rejection of proposal submitted by Cortez Heating & Air Conditioning, Inc. for McQuay HVAC factory chiller services for failure to provide a letter from the manufacturer stating that their firm is a Chiller Factory Authorized Service Agent as outlined in the RFP documents.

The proposal submitted by Cortez Heating & Air Conditioning, Inc. for Carrier chiller services is still under evaluation, and will be submitted to a future Board meeting as Part II.

**District School Board  
of Pasco County**

**SEP 06 2011**

**Board Approved**

**Notations and Exceptions:**

Offers from the vendors listed herein are the only offers received timely as of the specified opening date and time. All other offers submitted in response to this solicitation, if any, are hereby rejected as late.

**Bids Evaluated By:**

Emil Dacanay, Mechanical Engineer  
Rich McInnis, HVAC Crew Chief, Maintenance Department  
Sean McKillen, Assistant Crew Chief, Maintenance Department

**Bids Prepared By:**

Amy Flack, Buyer, Purchasing Department

**Reviewed and Authorized By:**

Kendra Goodman, CPPO, CPPB, Purchasing Agent, Purchasing Department *mw / KDG*

**District School Board  
of Pasco County**

**SEP 06 2011**

**Board Approved**



## DISTRICT SCHOOL BOARD OF PASCO COUNTY RFP TABULATION

|   |                         |   |                                 |   |              |
|---|-------------------------|---|---------------------------------|---|--------------|
| Date of Opening: March 10, 2011 @ 2:30 pm               | Carrier Corporation     | Cortez Heating & Air Conditioning, Inc. | McQuay International            |   |              |
| RFP Title: HVAC Factory Chiller Services                | 8656 Elm Fair Boulevard | 5928 21st Street East                   | 1911 US Hwy 301 North Suite 300 |   |              |
| RFP #: 11-067-AF  | Tampa, FL 33610         | Bradenton, FL 34203                     | Tampa, FL 33619                 |   |              |
| <b>Part I: **Award Date: September 6, 2011**</b>        |                         |   |                                 |   |              |
| <b>Labor Rates Per Manufacturer:</b>                    |                         |   |                                 |   |              |
| <b>Manufacturer: Carrier</b>                            |                         |   |                                 |   |              |
| Certified Chiller Technician Hourly Rate:               | \$115.00                | \$85.00                                 | No Bid                          |   |              |
| Certified Control Technician Hourly Rate:               | \$125.00                | \$85.00                                 | No Bid                          |   |              |
| <b>Manufacturer: McQuay</b>                             |                         |   |                                 |   |              |
| Certified Chiller Technician Hourly Rate:               | No Bid                  | \$85.00                                 | \$95.00                         |   |              |
| Certified Control Technician Hourly Rate:               | No Bid                  | \$85.00                                 | \$95.00                         |   |              |
| <b>Manufacturer: Trane</b>                              |                         |   |                                 |   |              |
| Certified Chiller Technician Hourly Rate:               | No Bid                  | \$85.00                                 | No Bid                          |   |              |
| Certified Control Technician Hourly Rate:               | No Bid                  | \$85.00                                 | No Bid                          |   |              |
| <b>Criteria:</b>  |                         |   |                                 |   |              |
| A. Letter of Transmittal/Table of Contents (max 10 pts) | n/a                     | 8.00                                    | 4.30                            |   |              |
| B. Firms's Profile (max 30 pts)                         | n/a                     | 20.00                                   | 18.33                           |   |              |
| C. Firm's Technical Qualifications (max 40 pts)         | n/a                     | 23.33                                   | 13.33                           |   |              |
| D. Proposal (max 5 pts)                                 | n/a                     | 30.00                                   | 15.00                           |   |              |
| E. Pricing (max 50 pts)                                 | n/a                     | 5.00                                    | 5.00                            |   |              |
| F. References (max 20 pts)                              | n/a                     | 50.00                                   | 44.75                           |   |              |
|   |                         | 20.00                                   | 16.00                           |   |              |
| <b>Score:</b>   | Disqualified            | 156.33                                  | 116.71                          | <b>RANK ORDER - HIGH TO LOW</b>         |              |
|   |                         |   |                                 | Cortez Heating & Air Conditioning, Inc. | 156.33       |
|   |                         |   |                                 | McQuay International                    | 116.71       |
|   |                         |   |                                 | Carrier Corporation                     | Disqualified |

District School Board  
of Pasco County

SEP 06 2011

Board Approved