



DISTRICT SCHOOL BOARD OF PASCO COUNTY

Kurt S. Browning, Superintendent of Schools

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638

Purchasing Services

Nicole Westmoreland, MBA, Purchasing Agent

813/ 794-2221 Fax: 813/ 794-2111

727/ 774-2221 TDD: 813/794-2484

352/ 524-2221 e-mail: nwestmor@pasco.k12.fl.us

April 1, 2014

MEMORANDUM

TO: Honorable School Board Members

FROM: Nicole Westmoreland, MBA, Purchasing Agent *NW*

RE: RFP #11-067-AF, HVAC Factory Chiller Services
One-Year Extension of a Three-Year Contract
Cortez Heating & Air Conditioning, Inc.
Daikin Applied (Formerly McQuay International)

On September 6, 2011, official action (attached) was taken to award the above-referenced RFP to Cortez Heating & Air Conditioning, Inc. and McQuay International. This RFP is a three-year contract, renewable annually based upon mutual consent of the parties. The third year of this contract will expire April 19, 2014.

Effective October 1, 2013, McQuay International was acquired by Daikin Applied. Daikin Applied has agreed in writing (attached) to honor the existing terms and conditions of RFP #11-067-AF, HVAC Factory Chiller Services.

Considering services have been satisfactory, Dan Snider, Vice President, Cortez Heating & Air Conditioning, Inc. and Craig Szenay, District Manager, Daikin Applied were contacted to verify their willingness to enter into a one-year extension as permitted under the general terms and conditions of the contract. As such they have agreed in writing (attached) to enter into a one-year extension of the contract.

It is my recommendation to enter a one-year extension of the contract from April 20, 2014 through April 19, 2015.

Should you have any questions regarding this matter, please feel free to contact Debra Reaves, extension 42219, at your earliest convenience.

NW/dr
Attachments

Date/Time: March 26, 2014 08:34:00

(813)794-2000 • (352) 524-2000 • (727) 774-2000 • www.pasco.k12.fl.us

The District School Board of Pasco County is System Accredited by AdvancED/Southern Association of Colleges and Schools



DISTRICT SCHOOL BOARD OF PASCO COUNTY

Kurt S. Browning, Superintendent of Schools

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638

Purchasing Services
Nicole Westmoreland, MBA, Purchasing Agent
813/794-2221 Fax: 813/794-2111
727/774-2221 TDD: 813/794-2484
352/524-2221 e-mail: nwestmor@pasco.k12.fl.us

REQUEST FOR PROPOSAL EXTENSION REQUEST
REQUEST FOR PROPOSAL #11-067-AF
REQUEST FOR PROPOSAL TITLE: HVAC Factory Chiller Services

X

Yes, I agree to extend RFP #11-067-AF for one year under the same terms and conditions as the existing RFP. The one year extension period shall be from April 20, 2014 through April 19, 2015.

No, I do not agree to extend RFP #11-067-AF

COMPANY NAME: Cortez Heating & Air Conditioning, Inc.

SIGNATURE: D. Snider

TYPED NAME AND TITLE: Daniel Snider / VP Industrial Division

TELEPHONE (WITH AREA CODE): 1-866-755-5211

FAX NUMBER (WITH AREA CODE): 941-758-4210

E-MAIL: dancortezac@mac.com

DATE: 3/5/14

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 EMAIL BACK TO: dreaves@pasco.k12.fl.us
DISTRICT SCHOOL BOARD OF PASCO COUNTY
ATTENTION: Debra Reaves, Buyer Assistant
PURCHASING DEPARTMENT
20430 GATOR LANE
LAND O' LAKES, FL 34638
(813) 794-2219 (PHONE)
(813) 794-2111 (FAX)

District Wide Accreditation • Southern Association of Colleges and Schools



DISTRICT SCHOOL BOARD OF PASCO COUNTY

Kurt S. Browning, Superintendent of Schools

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638

Purchasing Services

Nicole Westmoreland, MBA, Purchasing Agent

813/ 794-2221 Fax: 813/ 794-2111

727/ 774-2221 TDD: 813/ 794-2484

352/ 524-2221 e-mail: nwestmor@pasco.k12.fl.us

REQUEST FOR PROPOSAL EXTENSION REQUEST REQUEST FOR PROPOSAL #11-067-AF REQUEST FOR PROPOSAL TITLE: HVAC Factory Chiller Services

 X

Yes, I agree to extend RFP #11-067-AF for one year under the same terms and conditions as the existing RFP. The one year extension period shall be from **April 20, 2014 through April 19, 2015.**

 No, I do not agree to extend RFP #11-067-AF

COMPANY NAME: Daikin Applied

SIGNATURE: 

TYPED NAME AND TITLE: Craig Szenay / District Manager

TELEPHONE (WITH AREA CODE): 813-621-8440

FAX NUMBER (WITH AREA CODE): 813-621-6979

E-MAIL: craig.szenay@daikinapplied.com

DATE: March 5, 2014

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 EMAIL BACK TO: dreaves@pasco.k12.fl.us
DISTRICT SCHOOL BOARD OF PASCO COUNTY
ATTENTION: Debra Reaves, Buyer Assistant
PURCHASING DEPARTMENT
20430 GATOR LANE
LAND O' LAKES, FL 34638
(813) 794-2219 (PHONE)
(813) 794-2111 (FAX)

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

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.

Bid #11-067-AF

Page 2

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 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		
Part I: **Award Date: September 6, 2011**					
Labor Rates Per Manufacturer:					
Manufacturer: Carrier					
Certified Chiller Technician Hourly Rate:	\$115.00	\$85.00	No Bid		
Certified Control Technician Hourly Rate:	\$125.00	\$85.00	No Bid		
Manufacturer: McQuay					
Certified Chiller Technician Hourly Rate:	No Bid	\$85.00	\$95.00		
Certified Control Technician Hourly Rate:	No Bid	\$85.00	\$95.00		
Manufacturer: Trane					
Certified Chiller Technician Hourly Rate:	No Bid	\$85.00	No Bid		
Certified Control Technician Hourly Rate:	No Bid	\$85.00	No Bid		
Criteria:					
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		
Score:	Disqualified	156.33	116.71	RANK ORDER - HIGH TO LOW	
				Cortez Heating & Air Conditioning, Inc.	156.33
				McQuay International	116.71
				Carrier Corporation	Disqualified