



COMMENT AND REVIEW
to the
REQUEST FOR PROPOSAL (RFP) #080824
Entitled

HVAC Systems with Related Products and Services

The following advertisement was placed June 20, 2024, in and on the Sourcewell website www.sourcewell-mn.gov, Sourcewell Procurement Portal <https://proportal.sourcewell-mn.gov>, Biddingo, Merx, The New York State Contract Reporter www.nyscr.ny.gov, and PublicPurchase.com, June 20, 2024, and June 27, 2024 in the *USA Today* and *The Oklahoman*, and June 21, 2024, in South Carolina’s *The State*, the *Salt Lake Tribune*, the *Deseret News*, and in Oregon’s *Daily Journal of Commerce*:

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for HVAC Systems with Related Products and Services to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [https://proportal.sourcewell-mn.gov]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than August 8, 2024, at 4:30 p.m. Central Time, and late proposals will not be considered.

The solicitation process was conducted through the Sourcewell Procurement Portal. The following parties expressed interest in the solicitation by registering for this opportunity within the portal:

A&R Mechanical Contractors, Inc.	ATS Automation Inc.
ABM Building Solutions, LLC	Austin Air Systems, LTD
Abundant Air Heating & Cooling Inc.	Bexar Mechanical
ACCO Engineered Systems, Inc.	BGIS
Ainsworth Inc	Canadian Touch
Air Systems, Inc.	CAPP INC
ALL AMERICAN AA, LLC	Carrier Enterprise
Allied Construction Industries	Carrier Global Corp
Alpha Controls & Services Inc.LC	CCG Automation, Inc.
Ameresco, Inc.	Climate by Design International, Inc.
Ansell Canada Inc.	Climate Makers

Construction Reporter	McClure Company
Custom Controls Group, LLC	McKinstry Essention LLC
Daikin Applied Americas	McKinstry Viridis
Damascus Consulting LLC	McKinstry, LLC
EquipmentShare.com Inc	MDM Construction
Everest Mechanical Services, LLC	Mesa Energy Systems, Inc. dba EMCOR Services
Felicity Enterprises	NORESCO, LLC
FERGUSON ENTERPRISES LLC	North Texas Ductworks, LLC
Filterbuy Incorporated	NTS Holdings Ltd.
First Service Air Conditioning Contractors Inc	Oak Brook Mechanical Services Inc.
George S. Hall, Inc.	OPPM, State of Alaska
Greenheck Fan Corporation	Optimum Energy Co, LLC
Gunco LLC	PacificWest Energy Solutions Inc.
GWB Highlanders Heating & Air Conditioning INC	Path Company
Hardline Heating & Plumbing Ltd	PNW Diverse Solutions, LLC
Harris St. Paul, Inc	PWXPress
Havtech Service Division LLC	Regina Construction Association
Havtech, LLC	RJ Mechanical, Inc
HC Nye Co.	Robinson Supply
HD Supply Facilities Maintenance, Ltd.	RRT Inc
Henderson Building Solutions, LLC	Ryan Company Inc
Herc Rentals Inc.	Siemens Industry, Inc.
Hobbs & Associates	TCG Services LLC
Hoffman Mechanical Solutions	The Bosworth Company, Ltd.
Honeywell	The Jamar Company
Honeywell International, Inc.	The Salcido Connection, Inc.
Hotsy of Oklahoma	Thema LLC
Illinois Plumbing and Heating Supply Co.	Total Mechanical Services, Inc.
Innovational Water Solutions LLC	Turf Alliance LLC
ISOLT LLC	Universal Electric Motor Service, Inc
James M Pleasants, LLC	Veregy
Johnson Controls, Inc.	Veregy, LLC
Johnson-Laux Construction	Walsh Marine Products, Inc.
JONES ENVIRONMENTAL CONTR	WestExcel Automation
Lelam Holdings, LLC dba Climate Solutions	WWRC, Inc.

All Proposals remained sealed within the Sourcewell Procurement Portal until the scheduled due date and time. Proposals were electronically opened, and the list of all Proposers was made publicly available on the Sourcewell Procurement Portal, on August 8, 2024, 4:30 p.m., CT. Proposals were received from the following:

ABM Industries Inc.

A.T.S. Automation Inc.
Austin Air Inc.
Bexar Mechanical
Carrier Enterprise
Carrier Corporation
CCG Automation Inc.
Climate by Design International Inc.
Climate Makers
Daikin Applied Americas Inc
Filterbuy Incorporated
First Service Air Conditioning Contractors Inc.
Greenheck Fan Corporation
Harris St. Paul Inc.
Havtech LLC
H.C. Nye Company
Hobbs & Associates
Hoffman Mechanical Solutions Inc.
Honeywell
JMP Equipment Company LLC
Johnson Controls Inc.
Lelam Holdings LLC dba Climate Solutions
McClure Company
Optimum Energy Co LLC
PacificWest Energy Solutions Inc.
Path Company LLC
Siemens Industry Inc.
Legence Holdings LLC
Total Mechanical Services Inc.
Veregy LLC

Proposals were reviewed by the Proposal Evaluation Committee:

Brandon Town, NIGP-CPP, CPSM, CPSD, Senior Procurement Analyst
Joshua Young, CPPB, NIGP-CPP, Procurement Analyst II
Julie Riebe, Procurement Analyst II
David Gonzalez, Procurement Analyst

The findings of the Proposal Evaluation Committee are summarized as follows:

The Proposal Evaluation Committee applied the Sourcewell RFP evaluation criteria and determined that all proposal responses met the scope and mandatory submittal requirements and were evaluated.

ABM Industries, Inc. was founded in 1909 and by serving over 20,000 clients nationwide, they have generated annualized revenue of over \$8.1 billion in over 200 metro areas. ABM's energy professionals hold a wide range of certification and accreditations. They have over 250 branch offices and 166 sales professionals to meet the needs of participating entities. They are vendor neutral, therefore every solution will be based upon the individual needs of the entity. With their large volume buying discounts, they can pass that down to the participating entities for larger savings.

Carrier Global Corporation is a manufacturer of heating, ventilation, and HVAC systems, with a strong presence in the US and Canada. Carrier offers a comprehensive range of HVAC solutions, including preventive maintenance, installations, repairs, and sustainable solutions for commercial and industrial applications. The company operates through a network of 99 service offices and 900 dispatch points, ensuring extensive coverage and prompt service delivery across the US and Canada. Carrier's products have been recognized for their energy efficiency and versatility. Additionally, Carrier's customer service approach includes a dedicated Service Account Team and a response time of typically 4 hours for emergency outages. Carrier also emphasizes environmental sustainability, with initiatives like the use of environmentally responsible refrigerants and the development of energy-efficient technologies.

Daikin Applied Americas Inc. designs, manufactures, and sells heating, ventilation, and air conditioning (HVAC) products, systems, parts, and services for commercial buildings. Their commercial air conditioning solutions combine excellent energy savings and customizability with dependable maintenance service to fulfill a wide array of customer needs. With over 250 sales and service and over 2,650 sales and support staff in 80 offices, Daikin is willing and able to serve all of the US, US Territories, and Canada with no location restrictions and 24/7 support. They offer a significant discount off of line item pricing.

Greenheck Fan Corporation dba Greenheck Group is offering a wide range of air movement, control, conditioning, and distribution products. They are effectively able to sell and service participating entities throughout the United States and Canada through their 5,300 team members, and mechanical representative partners with 110 offices in the United States and 16 in Canada. They work to incorporate green initiatives not only with how their products perform, but also how their products are manufactured. Greenheck Fan Corporation is offering participating entities a generous discount off of list price which includes shipping in the continental United States

Honeywell International Inc. is a Fortune 100 company that has a 135-year history. Honeywell operates worldwide with 990 locations in over 100 countries, which includes more than 121 locations nationwide. With customized training plans and numerous technologically advanced products, Honeywell will be able to offer solutions to all participating entities within the United States and Canada. Their discount pricing includes 10% off MSRP and they will work with local utility companies to obtain all energy rebates available.

Johnson Controls Inc., is the manufacturer and service provider that is a leader in providing and servicing HVAC mechanical systems. They have over 160 branch locations and 92 distribution and warehouse facilities throughout the US and Canada with more than 42,000 direct employees. Johnson Controls has a firm commitment to environmental solutions being involved in over 500 renewable energy projects; additionally, Johnson Controls is committed to incorporating diverse-owned businesses into their product and service offerings. They are offering considerable discounts off the standard list price.

Siemens Industry, Inc., for more than 160 years, is a global manufacturer and innovator focusing on digitalization, electrification, and automation for the process and manufacturing industries and is a leader in power generation and distribution, intelligent infrastructure, and distributed energy systems. With approximately 9,000 representatives in sales and over 1,300 service representatives with over 100 offices in the US, Siemens is willing and able to serve all the US and US territories. Siemens offers a discount off MSRP for line items.

For these reasons, the Sourcewell Proposal Evaluation Committee recommends award of Sourcewell Contract #080824 to:


ABM Building Industries, Inc.

#080824-ABL


Carrier Global Corporation
Daikin Applied Americas Inc.
Greenheck Fan Corporation dba Greenheck Group
Honeywell International Inc.
Johnson Controls Inc.
Siemens Industry, Inc.

#080824-CAR
#080824-DIN
#080824-GRH
#080824-HNY
#080824-JHN
#080824-SIE


The preceding recommendations were approved on November 19, 2024.

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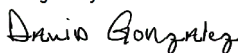
Brandon Town, NIGP-CPP, CPSM, CPSD, Senior Procurement Analyst

Signed by:

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Joshua Young, CPPB, NIGP-CPP, Procurement Analyst II

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Julie Riebe, Procurement Analyst II

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David Gonzalez, Procurement Analyst

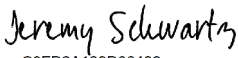
STATEMENT OF COMPLIANCE

As Chief Procurement Officer for Sourcewell, I have reviewed the recommendation of the Evaluation Committee and the accompanying support materials documenting the process followed for **RFP #080824 for HVAC Systems with Related Products and Services**.

The committee accepted, deemed responsive, evaluated, and recommended proposals for award. Under authority granted to the Chief Procurement Officer in Sourcewell's bylaws, the recommendations set forth above are approved.

I hereby certify:

1. Sourcewell is a government agency, created and authorized by Minnesota law to provide cooperative procurement master agreements.
2. The procurement process and resulting master agreements have been awarded in compliance with the laws of the State of Minnesota (Minnesota Statutes Chapter 471 and Minnesota Statutes Section 123A.21), and in conformity to Sourcewell's Procurement Policy.
3. The awards listed were made based on the results of the competitive solicitation process.
4. The awards listed were ratified by the Sourcewell Board of Directors on **November 19, 2024**.

Signed by:

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Jeremy Schwartz, CSSBB, CPPO, NIGP-CPP
Sourcewell Chief Procurement Officer