

REQUEST FOR PROPOSAL (RFP)

FOR

HVAC/MECHANICAL MAINTENANCE SERVICES



**Village of Waterford, WI
123 N River St.
Waterford, WI 53185
zjackson@waterfordwi.org**

May 28, 2019

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NOTICE TO BIDDERS

HVAC AND MECHANICAL MAINTENANCE SERVICES

FOR THE VILLAGE OF WATERFORD, WISCONSIN

Village of Waterford, through this Request for Proposal, invites written proposals from qualified firms for HVAC and mechanical services. Sealed bid proposals will be received by the Village for the **HVAC AND MECHANICAL MAINTENANCE SERVICES RFP** and should be addressed to: Director of Public Works, Village of Waterford, 123 N River St. Waterford, WI 53185. Sealed bids will be accepted until 4:00 PM Thursday, June 27, 2019 at which time bids will be publicly opened and read aloud. The term of the contract will be three years, contingent upon annual appropriations by Village of Waterford.

All bids must be in writing and must contain an original signature by an authorized officer of the firm. Electronic bids (i.e., telephonic, FAX, etc.) are NOT acceptable. All bids shall clearly contain on the outside of the sealed envelope in which they are submitted: **HVAC AND MECHANICAL MAINTENANCE SERVICES**.

Bid documents are on file and may be obtained at the Village Administrator's office at 123 N. River St and on the Village's website at www.waterfordwi.org.

It is the responsibility of the bidder to schedule an **on-site walk through** for each site prior to submitting a bid and to verify equipment details herein. To schedule a walk-through appointment, please contact Jim Bergles, Director of Public Works at (262) 534-1861.

The Village reserves the right to accept or reject any proposal, to waive irregularities in a proposal, or to negotiate if it appears to be in the best interest of the Village. The undersigned hereby agrees that if the foregoing proposal shall be accepted by the Village, the successful bidder will, within ten (10) consecutive calendar days after receiving notice of the acceptance of such bid proposal, provide proof of insurance and enter into a contract to furnish labor, equipment, and tools necessary to completely execute the work at the pricing provided in the attached cost proposal.

INSTRUCTION TO BIDDERS

1. Each proposal must include this entire packet with attachments as required and be signed by the bidder with their usual signature. Bids by partnerships should be signed with the partnership name by one of the members of the partnership or by an authorized representative, followed by the signature and title of the person signing. Proposals by corporations must be signed with the name of the corporation, followed by the signature and designation of the president, vice-president or person authorized to bind it contractually. **Any proposal not properly executed or missing any required information as specified herein will cause the bid to be considered non-responsive and shall be rejected by the Village.**
2. Proposals, to receive consideration, must be received prior to the specified time of opening and reading as designated in the invitation.
3. Bidders are required to use the proposal form furnished by the Village when submitting their proposal. Envelopes must be **sealed** when submitted and clearly marked on the outside indicating the name of the bid.
4. Proposals having any erasures or corrections thereon may be rejected unless explained or noted over the signature of the bidder.
5. References in the specifications or description of materials, supplies, equipment, or services to a particular trade name, manufacturer's catalog, or model number are made for descriptive purposes to guide the bidder in interpreting the type of materials or supplies, equipment or nature of the work desired. They should not be construed as excluding proposals on equivalent types of materials, supplies, and equipment or for performing the work in a manner other than specified.
6. Proposals should be mailed or delivered to Director of Public Works, Village of Waterford, 123 N River St. Waterford, WI 53185.
7. Special conditions, if any, included in this document shall take precedence over any conditions listed under General Conditions or Instructions to Bidders.
8. Bodily injury, property damage, liability, and worker's compensation insurance – As part of its bid response, the contractor shall attach copies of valid certificates of insurance as evidence that the contractor carries adequate insurance satisfactory to the Village (see Appendix B for required insurance types and minimum liability limits). Upon execution of the contract, the contractor shall provide copies of the same insurance, but with the addition of the Village of Waterford named as an additional insured party.

GENERAL SPECIFICATIONS HVAC/MECHANICAL MAINTENANCE SERVICES

Village of Waterford is seeking a well-qualified firm to provide a comprehensive heating-ventilation-air conditioning (HVAC) maintenance and repair program for its various facilities. The work will include provision of a total preventative maintenance program including the inspection, preventative maintenance, repair, programming, and other tasks and services necessary to ensure safe, well-maintained and efficiently operating HVAC and boilers.

SCOPE OF SERVICES

Equipment to be serviced – see page 16, Appendix A, List of Equipment by Facility.

The bidder shall retain licensed, professional personnel who have successfully and competently provided private, Village and/or government facility HVAC and mechanical maintenance and repair services on projects of similar scope and complexity. It shall be the bidder's responsibility to develop and implement a routine maintenance program to effectively maintain, to the satisfaction of the Village, all aspects of HVAC and mechanical systems in Village-identified facilities. For the purpose of this contract, routine preventative HVAC maintenance shall be defined as scheduled routine inspection and proactive servicing of HVAC systems so as to facilitate heating/cooling with minimal downtime. Routine maintenance and all repairs shall be provided in accordance with the highest standards of the industry, skill, workmanship and applicable trade practices, meet all warranties, and be in conformance with all applicable laws, codes, and regulations. It is the responsibility of the service provider to maintain the units at their highest efficiency. The successful bidder's maintenance program and repairs shall, at a minimum, include but not be limited to the following specifications:

1. Prices as stated on the Proposal A form shall include labor and consumables.
2. Consumables shall be generally defined as lubricants, refrigerants, belts, filters, plugs, and electrodes.
3. Each building/area identified on the Proposal A form shall be listed on the successful bidder's invoice by location.
4. Successful bidder shall provide oversight and document that all Village-owned facilities under contract with bidder are receiving required work.
5. Successful bidder shall investigate noises and lubricate and adjust as recommended per manufacturer's specifications, at no additional cost to the Village.
6. Prior to beginning any repair or replacement, successful bidder will troubleshoot the system to diagnose the system's problems. The Village shall not incur any extra charge for this service. Successful bidder will itemize the equipment list recommended for repair or replacement.
7. All repairs (including both labor & materials) not covered under Bid Proposal A, but covered under Bid Proposal B, will be discounted as stated in Bid Proposal B as a percent of MSRP and displayed clearly on all quotes and invoices.
8. Successful bidder shall report any extenuating conditions, which are not covered in the contract, which may affect the performance quality of equipment.

9. Successful bidder shall inspect all HVAC systems at least four (4) times each year, with seasonal startup and run inspections performed and documented. This shall include two (2) mid-season inspections (between February and August), one cooling season (between April and May), and one heating season (between October and November).
10. Successful bidder shall provide a complete, detailed service report quarterly, referencing the building name and unit serviced, for each unit listed. Contractor shall provide a heating and air conditioning checklist after each visit specifying the preventative maintenance performed (see sample below) along with notification of any defective or worn parts needing replacement. **Only with proper written authorization from the Village shall repairs be made.**

Sample Preventive Maintenance Report

Heating checklist for preventive maintenance – four (4) times per year

	Spring	Mid Season	Fall	Mid Season
General Unit Tasks (GU)				
Cabinetry			X	X
Check for Unusual Vibrations			X	X
General Appearance			X	X
Unit Integrity			X	X
Area Conditions			X	X
Fan Tasks (FT)				
Belt and Drive Inspection			X	
Bearing, Shaft and Mount Inspection			X	
Belt Replacement			X	
Adjust and Alignment of Drive Parts			X	
Fan wheel Inspection			X	
Housing Inspection			X	
Filter Maintenance	X	X	X	X
Lubrication of Applicable Parts			X	
Heating Tasks (HT)				
Heat Exchanger Check			X	

Safety controls Check
 Burner and Pilot Inspection
 Combustion Fan Inspection
 Flue and Diverter Inspection
 Gas Pressure and Regulator Check

		X	
		X	X
		X	X
		X	X
		X	

Electrical Tasks (ET)

Power Connections
 Disconnect Condition
 Wiring Integrity Check
 Tighten all Connections
 Verify Incoming Voltage
 Record all Motor Data
 Overload Protection and Starter Check
 Safety Circuit Check

		X	X
		X	X
		X	
		X	
		X	
		X	
		X	
		X	

System Check (SC)

Heating Cycle and Record Temperatures
 Measure and Record Temperature Rise
 Operational Sequence Check
 Note: Check applicable boxes

		X	X
		X	
		X	

Issues identified: _____

Air conditioning checklist for preventive maintenance – four (4) times per year

General Unit Tasks (GU)

Cabinetry
 Check for Unusual Vibrations
 General Appearance
 Unit Integrity

	Spring	Mid Season	Fall	Mid Season
	X	X		
	X	X		
	X	X		
	X	X		

Area Conditions

X	X		
----------	----------	--	--

Refrigeration Tasks (RT)

Condenser Coil Inspection Visual

X	X		
----------	----------	--	--

Pressure Clean Condenser Coil

X			
----------	--	--	--

Check Refrigerant Levels

X	X		
----------	----------	--	--

Safety and Operating Check

X	X		
----------	----------	--	--

Capacity Control Checks

X	X		
----------	----------	--	--

Moisture Checks

X			
----------	--	--	--

Check for Visible Leaks

X			
----------	--	--	--

Metering Device Check

X			
----------	--	--	--

Verify Crankcase Heater Operation

		X	
--	--	----------	--

Inspect Piping for Wear and Potential Leaks

X			
----------	--	--	--

Record Temperatures and Pressures

X	X		
----------	----------	--	--

Condenser Fan Inspection and Sequence

X	X		
----------	----------	--	--

Electrical Tasks (ET)

Power Connections

X	X		
----------	----------	--	--

Disconnect Condition

X	X		
----------	----------	--	--

Wiring Integrity Check

X			
----------	--	--	--

Tighten all Connections

X			
----------	--	--	--

Verify Incoming Voltage

X			
----------	--	--	--

Record all Motor Data

X			
----------	--	--	--

System Checks (SC)

Cooling Cycle and Record Temp and Pressures

X	X		
----------	----------	--	--

Issues identified: _____

Furnace Checklist for preventive maintenance – four (4) times per year

	Spring	Mid Season	Fall	Mid Season
General Unit Tasks (GU)				

Cabinetry
 Check for Unusual Vibrations
 General Appearance
 Unit Integrity
 Area Conditions

		X	X
		X	X
		X	X
		X	X
		X	X

Fan Tasks (FT)

Belt and Drive Inspection
 Bearing, Shaft and Mount Inspection
 Belt Replacement
 Adjust and Alignment of Drive Parts
 Fan wheel Inspection
 Housing Inspection
 Filter Maintenance
 Lubrication of Applicable Parts

		X	
		X	
		X	
		X	
		X	
		X	
X	X	X	X
		X	

Heating Tasks (HT)

Heat Exchanger Check
 Safety controls Check
 Burner and Pilot Inspection
 Combustion Fan Inspection
 Flue and Diverter Inspection
 Gas Pressure and Regulator Check

		X	
		X	
		X	X
		X	X
		X	X
		X	

Electrical Tasks (ET)

Power Connections
 Disconnect Condition
 Wiring Integrity Check
 Tighten all Connections
 Verify Incoming Voltage
 Record all Motor Data

		X	X
		X	X
		X	
		X	
		X	
		X	

Overload Protection and Starter Check

		X	
		X	

Safety Circuit Check

System Check (SC)

Heating Cycle and Record Temperatures

		X	X
		X	
		X	

Measure and Record Temperature Rise

Operational Sequence Check

Issues identified: _____

Boiler Checklist for Preventive Maintenance – Four (4) times per year

	Spring	Mid Season	Fall	Mid Season
General Unit Tasks (GU)				
Cabinetry			X	X
Check for Unusual Vibrations			X	
General Appearance			X	X
Unit Integrity			X	
Area Conditions			X	X

Electrical Tasks (ET)

Power Connections	X	X	X	X
Disconnect Condition	X	X	X	X
Wiring Integrity Check	X	X	X	X
Tighten All Connections	X		X	
Verify Incoming Voltage			X	
Record All Motor Data	X	X	X	X

Fire Side Tasks (FS)

Combustion Chamber Check			X	X
Check Tubes Clean as Necessary			X	
Check Gasketing			X	
Flue and Diverter Inspection			X	X

Refractory Integrity Check

		X	
--	--	---	--

Burner Tasks (BT)

Verify Burner Sequence

		X	X
--	--	---	---

Safety Sequence Check and Verification

		X	X
--	--	---	---

Check operation of Burner

		X	X
--	--	---	---

Combustion Analysis

		X	
--	--	---	--

Gas Leak Checks

		X	
--	--	---	--

Draft Fan Inspection

		X	X
--	--	---	---

Boiler Gas Fired Continued

	Spring	Mid Season (Optional)	Fall	Mid Season (Optional)
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Water Side Tasks (WT)

Inspect and Check Feed System

		X	X
--	--	---	---

Check for Leaks

		X	
--	--	---	--

Test Low Water Cutoff Sequence/
Blowdown

		X	X
--	--	---	---

Measure and Record Pressures

		X	X
--	--	---	---

Verify Pump Operation

		X	X
--	--	---	---

Expansion Tank and Relief Operation

		X	X
--	--	---	---

System Check (SC)

Cycle Unit for Proper Operation

		X	
--	--	---	--

Record Temperatures and Set Points

		X	X
--	--	---	---

Verify Operation of Reset Controllers

		X	
--	--	---	--

Issues identified: _____

***** Successful bidder shall provide a detailed maintenance program for each building as an addendum to this contract for services.**

GENERAL CONDITIONS

1. Bid Acceptance – Village of Waterford reserves the right to reject any or all proposals. Unless otherwise specified, the Village reserves the right to accept any item in a proposal. In case of error in extending the total amount of the bid, the unit prices shall govern.
2. Payment – Current payment shall be considered to have been made as computed from 30 days from the date of delivery and acceptance at destination, or from date correct bill or claim voucher properly certified by the successful bidder is received. Partial payments, based on a certified approved estimated by the Village, of materials, supplies or equipment delivered or work done, may be made upon presentation of a properly executed claim voucher. Final payment will be made by the Village when materials, supplies, equipment or the services performed have been fully delivered or completed to the full satisfaction of the Village.
3. Bid Default – In case of default by the bidder or contractor, Village of Waterford may procure the articles or services required by this agreement from other sources and hold the successful bidder responsible for any excess costs.
4. Unit Prices – Prices should be stated in units of quantity specified.
5. Quoted Prices – Unless otherwise stated by the successful bidder, prices quoted will be considered as being based on delivery to a designated destination and to include all charges for packing, crating, containers, shipping, etc., and in strict accordance with specifications and standards as originally stated.
6. Substitutions – Wherever a reference is made in the specifications or description of the materials, supplies, equipment or services required, to a particular trade name, manufacturer's catalogue, or model number, the bidder if awarded a contract or order, will be required to furnish the particular item referred to in strict accordance with the specifications or description unless a departure or substitution is clearly noted and described in the proposal.
7. Hold Harmless – The successful bidder agrees to protect, defend, and save the Village harmless against any demand for payment for the use of any patented material, process, article, or device that may form a part of the work covered by either order or contract. Bidder further agrees to indemnify and save the Village harmless from suits or action of every nature and description brought against it, for or on account of any injuries or damages received or sustained by any party or parties, by or from any of the acts of the contractor, his employees, subcontractors, or agents.
8. W-9 Form – Successful bidder agrees to complete and place on file annually or as otherwise required by the Village, a federal W-9 Form, "Request for Taxpayer Identification Number and Certification."
9. Proof of Insurance – The successful bidder agrees to provide proof of insurance, naming the Village of Waterford as an additional insured, as specified in Appendix B.

Bid Proposal A

HVAC Preventative Maintenance Services – Village of Waterford

Bidder must provide pricing for each item listed. If additional pricing elements are being offered by the bidder, they are to be listed under “other services/items offered.”

_____ (Bidder name) having examined the bid proposal forms and specifications, does hereby offer the following HVAC/MECHANICAL MAINTENANCE SERVICES from August 1, 2019 through July 31, 2022, by location at the following prices:

#	Location	Description	Unit Price 2019/2020	Unit Price 2020/2021	Unit Price 2021/2022	3 Year Total
1	Village Hall	2 makeup air units, 2 condensing units, 3 boilers				
2	Library	2 boilers, 1 rooftop unit, 1 makeup air unit				
3	Seidel Building	1 rooftop unit, ground level for makeup air heating/AC unit				
4	DPW Building	1 furnace < 5 tons, 1 condensing unit				

Additional Questions required to complete bid:

1. How many clients does your company currently serve with the type of services described? Are any of them Wisconsin municipalities?

2. Please provide the names, phone numbers and email addresses of at least three current customers with similar mechanical equipment to whom you provide preventive maintenance.

**Bid Proposal B
Labor Rates Only**

Bidder shall provide pricing for each item listed below. If additional pricing elements are being offered by the bidder, they are to be listed under “other services/items offered.”

Guaranteed Response Time: Bidder should build into its pricing a requirement by the Village to guarantee an on-site response time as follows for both Bid Proposal A and Bid Proposal B: For a reported failure during business hours (Monday-Friday, 8 AM – 5 PM) of four (4) hours. On weekends and holidays a guaranteed response time of twelve (12) hours.

_____ (Bidder name) having examined the bid proposal forms and specifications, does hereby offer the following HVAC/MECHANICAL MAINTENANCE SERVICES from August 1, 2019 through July 31, 2022, by location at the following prices:

Item	Description	Price 2019/2020	Price 2020/2021	Price 2021/2022
1	Regular Hourly Rate			
2	Overtime Rate (when does OT rate apply) _____ _____			
3	Weekend Rate			
4	Holiday Rate			
5	Travel time/mileage/other if not included above, with explanation of how calculated:			
6	Replacement parts discount rate, if offered:			

The above pricing is for service and repair work determined necessary as a result of preventative maintenance activities, or at the request of the Village in the event of a problem that occurs between preventative maintenance visits. **In no event shall this work commence without the written approval of the Village.**

VARIANCE FROM SPECIFICATIONS: If the bidder is unable to comply with the specifications as outlined, the bidder shall clearly note these variations from the specifications. The bidder may

also propose additions to these specifications for the Village to consider, but the costs associated with these additions shall be stated separately.

Oh behalf of _____, I hereby submit this proposal for your consideration on _____, 2019 (insert date). The undersigned acknowledges that this proposal is subject to the General Conditions and the General Specifications included in the contract documents. In submitting this proposal, it is understood that the right is reserved by the Village to reject any and all proposals, and waive any irregularities in the bidding process.

Bidder Representative Name & Title (printed)

Witness Name (printed)

Signature

Witness Signature

Street Address

City

State

ZIP

Business Phone

Emergency/After Hours Phone

Appendix A – List of Equipment by Facility/Location

Village Hall – 123 River Street

- Two (2) makeup air units, Trane
- Two (2) exterior condensing units, Trane
- Three (3) boilers, AO Smith models GB200200, 200GB300, 200GB300
- Three (3) boiler pumps, ¼ ton, B&G
- Ten (10) reheat coils
- One (1) tracer controls system, Trane

Library– 101 N. River Street

- Two (2) boilers, Weil McLain Ultra 310, installed 2008
- Four (4) boiler/system pumps, B&G, 2001
- One (1) roof top A/C condenser unit, 60 ton, York, 2001
- One (1) makeup air unit, McQuay, 2001
- One (1) return and exhaust fan, McQuay, 2001

Seidel Building – 625 N River Road

- One (1) 12.5-ton Trane HVAC unit, installed in 2018

DPW Building – 801 Ela Avenue

- One (1) furnace/makeup air unit, Carrier, 2006
- One (1) condenser, carrier 38 TKB, 2006

It is the responsibility of the bidder to schedule an **on-site walk through** for each site prior to the bid opening and to verify equipment details herein. To schedule a walk-through appointment, please contact Jim Bergles, Director of Public Works at (262) 534-1861.

Appendix B – Required Proof of Insurance

The successful bidder shall provide proof of insurance that includes the following specifications and follows this general form:

This is to certify that the following endorsement is part of the policies described below:

NAMED INSURED (CONTRACTOR)	COMPANIES OFFERING COVERAGE
ADDRESS	A. B. C.

It is hereby understood and agreed that the Village of Waterford, its Village commission and each member thereof and every officer and employee of the Village shall be named as joint and several assureds with respect to claims arising out of the following project:

HVAC/MECHANICAL MAINTENANCE SERVICES

It is further agreed that the following indemnity agreement between the Village of Waterford and the named insured is covered under this policy: Contractor agrees to indemnify, hold harmless and defend Village, its Village commission and each member thereof and every officer and employee of Village from any and all liability or financial loss resulting from any suits, claims, losses or actions brought against and from all costs and expenses of litigation brought against Village, its Village commission and each member thereof and any officer or employee of Village that results directly or indirectly from the wrongful or negligent actions of contractor's officers, employees, agents or others employed by Contractor while engaged by contractor in the performance of this agreement.

It is further agreed that the inclusion of more than one insured shall not operate to increase the limit of the company's liability and that insurer waives any right on contribution with insurance which may be available to the Village of Waterford.

The contractor, or any of its subcontractors, shall not commence work under this contract until it has attained the insurance required below and shall keep such insurance in force during the entire life of this contract. All coverage shall be with insurance companies licensed and admitted to do business in the State of Wisconsin and acceptable to Village of Waterford. The requirements below should not be interpreted to limit the liability of the contractor. All deductibles and SIRs are the responsibility of the Contractor.

The Contractor shall procure and maintain the following insurance coverage:

1. Workers Compensation Insurance including Employer's Liability Coverage, in accordance with all applicable statutes of the State of Wisconsin
2. Commercial General Liability Insurance on an "occurrence basis" with limits of liability not less than \$1 million per occurrence and aggregate. Coverage shall include the following extensions: (a) Contractual Liability; (b) products and completed operations;

(c) Independent Contractors Coverage; (d) Broad Form General Liability Extensions or equivalent, if not already included.

3. Automobile Liability including Wisconsin No-Fault Coverage, with limits of liability not less than \$1 million per occurrence, combined single limit for Bodily Injury, and Property Damage. Coverage shall include all owned vehicles, all non-owned vehicles, and all hired vehicles.
4. Additional Insured – Commercial General Liability and Automobile Liability, as described above, shall include an endorsement stating the following shall be Additional Insureds: Village of Waterford, all elected and appointed officials, all employees and volunteers, all boards, commissioners, and/or authorities and board members, including employees and volunteers thereof. It is understood and agreed by naming Village of Waterford as additional insured, coverage afforded is considered to be primary and any other insurance Village of Waterford may have in effect shall be considered secondary and/or excess.
5. Cancellation Notice – All policies, as described above, shall include an endorsement stating that it is understood and agreed that a ten (10) day notice for non-payment of premium is required and a thirty (30) day notice is required for non-renewal, reduction, and/or material change, shall be sent to: Village Administrator, Village of Waterford, 123 N River St Waterford WI, 53185.
6. Proof of Insurance Coverage – The contractor shall provide Village of Waterford at the time that the contracts are returned by him/her for execution, a Certificate of Insurance as well as the required endorsements.

If any of the above coverages expire during the term of this contract, the contractor shall deliver renewal certificates and endorsements to Village of Waterford at least ten (10) days prior to the expiration date.

Please include a copy of insurance declaration verifying amounts of coverage. The verification of insurance is not an insurance policy and does not amend, extend, or alter the coverage afforded by the policies listed herein. Notwithstanding any requirement, term, or condition of any contract or other document with respect to which this certificate or verification of insurance may be issued or may pertain, the insurance afforded by the policies described herein is subject to all the terms, exclusions and conditions of such policies.

Date _____ BY _____
Authorized Insurance Agent

Agency _____ Title _____

Address _____