



COMMENT AND REVIEW
to the
REQUEST FOR PROPOSAL (RFP) #070121
Entitled

HVAC Systems and Related Services

The following advertisement was placed May 13, 2021 in *USA Today*, in South Carolina's *The State*, in *The Oklahoman* 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, PublicPurchase.com, and May 14, 2021 in Oregon's *Daily Journal of Commerce*:

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for HVAC Systems and Related 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 July 1, 2021, 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:

ACCO Engineered Systems, Inc.	ICOM Refrigeration Corp.
Adrian L. Merton, Inc.	Johnson Controls Canada, LP
Advantage Air and Service	Johnson Controls, Inc.
Ainsworth, Inc.	Juice Technologies, Inc.
Alterna Mechanical Systems, Ltd.	Lakeshore Learning Materials
Austin Air Systems (Canada), Inc.	Limbach Company, LLC
Automated Logic Contracting Services	McCloskey Mechanical Contractors, Inc. Corporate Headquarters
Berg Chilling Systems, Inc.	Mechanical Services of Central Florida, Inc.
Black & McDonald, Limited	Mechanical Technology, Inc.
BMP Mechanical, Ltd.	Nalco Company, LLC
Cantherm Heaters	Nalco Water
Carmichael Engineering, LTD	NationWide Home Services Corp.
Carrier Global Corp	Norstar Heating & Cooling, Inc.

Carson Design and Manufacturing, Inc.	Office of General Services
CCG Automation, Inc.	Ogni, Inc.
Charlton and Hill, Ltd	Onec Air
Clean Air Group	Ottawa Construction Association
Climate by Design International, Inc.	Plumbing & Heating Wholesale
Comfort Care, Inc.	Precision Control Systems, Inc.
Comfort Systems USA	Pure Air Control Services, Inc.
Construction Bid Source	RealTerm Energy US, L.P.
Construction Industry Center	Regina Construction Association
Control Solutions, Inc.	Robinson Supply
Cooling Guard Mechanical Corp.	Safe Air UV
Core Control, Inc.	Siemens Industry, Inc.
Daikin Applied Americas, Inc.	simple air hvac corp.
Daystar Mechanical Plumbing and Heating, Inc.	Simpson Technical Services, LLC
Delos Canada	Smardt Chiller Group, Inc.
E.S. Fox, Limited	SPCAZ
Edon Properties, Inc. o/a Edon Management	Sterasure, Inc.
EMCOR Facilities Services, Inc.	The Blue Book Network
FAMD, INC.	The Limbach Company
Filtration Group IAQ	The Tools Man, Inc.
Gateway Mechanical Systems, Inc.	Timilon Corporation
General & Mechanical Services	Trane U.S.
Global Plasma Solutions, Inc.	W W Grainger, Inc.
Green PI, Inc.	Winsupply Anniston AL CO
Grok Energy Services, Inc.	WSP Canada, Inc.
Hill Mechanical Corp.	Yates Company, LLC
Honeywell International, 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 July 1, 2021, at 4:34:37 pm CT. Proposals were received from the following:

- ACCO Engineered Systems, Inc.
- Austin Air Systems (Canada), Inc.
- Black & McDonald, Limited
- Carrier Global Corp
- Carson Design and Manufacturing, Inc.
- CCG Automation, Inc.
- Comfort Systems USA
- FAMD, INC. (HMI Industries, Health-Mor, Inc.)
- General & Mechanical Services
- Global Plasma Solutions, Inc.
- Hill Mechanical Corp.
- Honeywell International, Inc.
- Johnson Controls, Inc.

Juice Technologies, Inc.
Onec Air
Pure Air Control Services, Inc.
Safe Air UV (EvergreenUV, LLC)
Siemens Industry, Inc.
Smardt Chiller Group, Inc.
The Limbach Company
The Tools Man, Inc.

Proposals were reviewed by the Proposal Evaluation Committee:

Kim Austin, MBA, CPPB, Procurement Lead Analyst
Michael Muñoz, CPPB, Procurement Analyst
Carol Jackson, Procurement Analyst
Beverly Hoemberg, 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.

Carrier Global Corp. is a manufacturer of heating, ventilation, air-conditioning and refrigeration systems, controls, services, and sustainable solutions for commercial and industrial applications. They are offering parts, equipment, factory startup, turnkey product installations, upgrades, indoor air quality solutions. Carrier has 99 field offices and a distributor network to serve Sourcewell participating entities throughout the United States and Canada. Their products and services are being offered with significant discounts off list price.

FAMD, INC., is the manufacturer of FilterQueen Defender, an FDA registered Class II medical device. This device is portable and removes over 99.99% of particles down to 0.1 micron. They have a sales and distributor network available throughout the United States and Canada. FAMD is offering notable discounts off retail pricing to Sourcewell participating entities.

Honeywell International, Inc., manufactures a suite of products that promote integration of building and business systems to help optimize productivity, efficiencies, and resources. Honeywell is strategically located throughout the United States and Canada and is ready to serve Sourcewell participating entities. They are offering a range of discounts off MSRP pricing.

Johnson Controls, Inc., is the manufacturer of York brand HVAC equipment, and also installs and services HVAC mechanical systems and controls of other brands. They have over 160 branch locations throughout the US and Canada and a service force of 4,800 front-line service providers. Johnson Controls has a firm commitment to environmental and social requirements and goals; as well as a supplier diversity program with over 700 Historically Underutilized Business Entities. They are offering considerable discounts off the standard list price.

Juice Technologies, Inc., is a reseller and service provider offering HVAC services, energy engineering, project development, consulting, and project management services. They offer turnkey project development and implementation, HVAC controls engineering services, facility and energy master planning services, on-site generation services and energy consulting services. Their sales and distribution network are geographically spread

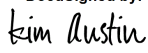
across the United States and Canada to serve Sourcewell participating entities. Juice Technologies is offering a competitive discount off MSRP/list pricing.

Siemens Industry, Inc. is the manufacturer and reseller of building automation, fire, and security products, and a provider of building automation services, energy, electrical, and mechanical services. Their sales and services teams stand ready to serve Sourcewell participating entities throughout the United States and Canada. Siemens offers considerable discounts from MSRP or list pricing, and with standard shipping, delivery, and freight included in the continental US.

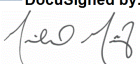
For these reasons, the Sourcewell Proposal Evaluation Committee recommends award of Sourcewell Contract #070121 to:

Carrier Global Corp.	#070121-CAR
FAMD, INC.	#070121-HMI
Honeywell International, Inc.	#070121-HNY
Johnson Controls, Inc.	#070121-JHN
Juice Technologies, Inc.	#070121-JUC
Siemens Industry, Inc.	#070121-SIE


The preceding recommendations were approved on August 11, 2021.

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Kim Austin, MBA, CPPB Procurement Lead Analyst

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Michael Munoz, CPPB, Procurement Analyst

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Carol Jackson, Procurement Analyst

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Beverly Hoemberg, 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 #070121 for HVAC Systems and Related 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 contracts.
2. The procurement process and resulting contracts 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.

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Jeremy Schwartz, CSSBB, CPPO
Chief Procurement Officer