



**School Board of Leon County, Florida
District Term Contract
DTC-25-1034**

HVAC Installation, Maintenance, and Repair Services

This Contract is between the School Board of Leon County, a public school district within Leon County, Florida, with offices at 2757 West Pensacola Street, Tallahassee, FL 32304 (District), and Trane U.S., Inc., (Contractor) located at 8929 Western Suite 1 Jacksonville, Florida 32256. The District and Contractor are collectively referred to herein as "Parties" and individually as a "Party." All capitalized terms shall have the meaning assigned to them in the Contract unless otherwise defined here.

The Contractor responded to the District's Request for Proposals, No: RFP 256-2025, HVAC Installation, Maintenance, and Repair Services. The District has accepted the Contractor's Proposal and enters into this Contract in accordance with the terms and conditions of RFP 256-2025, HVAC Installation, Maintenance, and Repair Services.

Accordingly, and in consideration of the mutual promises contained in the Contract, the Parties agree as follows:

I. Scope of Work

The services and/or commodities to be provided by the Contractor pursuant to this Contract are defined in RFP 256-2025 HVAC Installation, Maintenance, and all Addenda which are referenced and incorporated herein. The vendor's proposal is attached as Exhibit B. This Contract serves as a master agreement, with individual purchases being made via purchase orders (P.O.s).

II. Contract Term

The initial term of the Contract is for three (3) years. The initial Contract term shall begin on May 15, 2024, or on the last date on which it is signed by all Parties, whichever is later.

III. Renewal Terms

The District and the Contractor may renew the Contract in whole or in part, for a renewal term not to exceed three (3) years or portions thereof, upon mutual agreement of the Parties as set forth in the Contract.

IV. Contract

This Contract, together with the following attached documents (Exhibits), sets forth the entire understanding of the Parties and supersedes all prior agreements, whether written or oral, with respect to such subject matter.

All Exhibits attached to this Contract are incorporated in their entirety and form part of this Contract. The Contract has the following Exhibits:

- a) Exhibit A: RFP 256-2025 HVAC Installation, Maintenance, and Repair Services and all Addenda;
- b) Exhibit B: Trane U.S., Inc., response to RFP 256-2025 HVAC Installation, Maintenance, and Repair Services; and
- c) Exhibit C: Trane U.S., Inc., cost proposal.

In case of conflict, the documents shall have priority in the order listed:

- a) The District Term Contract;
- b) Exhibit A: RFP 256-2025 HVAC Installation, Maintenance, and Repair Services and all Addenda;
- c) Exhibit B: Trane U.S., Inc., response to RFP 256-2025 HVAC Installation, Maintenance, and Repair Services; and
- d) Exhibit C: Trane U.S., Inc., cost proposal.

V. Amendments

No oral modifications to this Contract are acceptable. All modifications to this Contract must be in writing and signed by both Parties, except changes to Section VII., below. Any future amendments of the Contract, that alter the definition of the services, shall define the services in the same format as Exhibit A.

Notwithstanding the order listed in Section IV, amendments issued after Contract execution may expressly change the provisions of the Contract. If an amendment expressly alters the Contract, then the most recent amendment will take precedence.

VI. Contract Notices

Contract notices may be delivered by email to the Contractor's designated contact person as prescribed in Section VII.

VII. Contract Management

The District employee who is primarily responsible for maintaining the Contract Administration file is:

Shelly Kelley, Coordinator
Office of the General Counsel
Leon County Schools
3397 West Tharpe Street
Tallahassee, FL 32303
Telephone (850) 488-1206
Email: kelleys2@leonschools.net

The District's Contract Manager is:

Ryan Peck, Director
Maintenance Department
Leon County Schools
3420 W. Tharpe St., Suite 200
Tallahassee, Florida 32303
850-617-1818
peckr@leonschools.net

The District may appoint a different Contract Administrator or Manager, which will not require an amendment to the Contract, by sending written notice to the Contractor. Any communication to the District relating to the Contract shall be addressed to the District's Contract Manager or designee.

The Contractor has assigned the following individual(s) to serve as the designated contact person for this Contract:

Primary Contact:

Joe Follenweider, General Sales Manager, North Florida
Trane U.S., Inc.
8929 Western Suite 1 Jacksonville, Florida 32256
904-596-4158
joe.follenweider@trane.com

All questions and customer service issues concerning this Contract shall be directed to the Contractor's designated contact person(s), above. It will be the designated contact person's responsibility to coordinate with necessary District personnel, as required, to answer questions and resolve issues. The Contractor must provide written notice to the District's Contract Manager or designee if a new employee is designated as the contact person for this Contract.

VIII. Termination

A. Termination for Convenience

The Contract may be terminated by the District upon no less than 60 calendar days' notice and by the Contractor upon no less than 180 calendar days' notice, without cause, unless a lesser time is mutually agreed upon by both parties. Notice shall be delivered by certified mail (return receipt requested), by another method of delivery whereby an original signature is obtained, or in-person with proof of delivery.

B. Termination for Cause

If a breach of this Contract occurs by the Contractor, the District may terminate the Contract for cause. The District chooses to provide, at its exclusive option, an opportunity for the Contractor to cure the breach for cause within 30 calendar days upon written notice of the deficiency by the District. Any breach of this Contract which is still left uncured by the Contractor after the District has elected to provide 30 calendar days to cure (remedy) the breach, may result in the District's termination of this Contract upon 24 hours written notice by the District. If the District does not elect to afford an opportunity for the Contractor to cure a breach (e.g., instances of egregious Contractor conduct or other Contractor actions which may be harmful to the District), the District may immediately terminate this Contract for cause, upon 24 hours' written notice to the Contractor, as described in this section. Notice shall be delivered by certified mail (return receipt requested), in person with proof of delivery, or by another method of delivery whereby an original signature is obtained.

C. Termination for Unauthorized Employment

Violation of the provisions of Section 274A of the Immigration and Nationality Act shall be grounds for unilateral cancellation of this Contract.

D. Termination for Lack of Funds

In the event the funds to finance this Contract become unavailable, the District may terminate the Contract upon no less than 24 hours notice, in writing, to the Contractor. Notice shall be delivered by certified mail (return receipt requested), in-person with proof of delivery, or by another method of delivery whereby an original signature is obtained. The District shall be the final authority as to the availability of funds.

E. Contract Termination Requirements

If at any time, the Contract is canceled, terminated, or otherwise expires, and a Contract is subsequently executed with a contractor other than the Contractor or service delivery is provided by the District, the Contractor has the affirmative obligation to assist in the smooth transition of Contract services to the subsequent provider. This includes, but is not limited to, the timely provision of all Contract-related documents, information, and reports not otherwise protected from disclosure by law to the replacing party.

IX. Assignment

The Contractor shall not sell, assign, or transfer its responsibilities or interests under this Contract to another party without prior written approval of the District's Contract Manager or designee. The District shall, at all times, be entitled to assign or transfer its rights, duties, and obligations under this Contract to another governmental agency or special district of the State of Florida upon providing written notice to the Contractor.

X. Subcontracts

The Contractor is fully responsible for all work performed under this Contract. The Contractor may, upon receiving written consent from the District's Contract Manager or designee, enter into written subcontract(s) for the performance of certain obligations under this Contract. No subcontract shall relieve the Contractor of any responsibility for the performance of its contractual duties. All payments to subcontractors shall be made by the Contractor.

It is understood and agreed that the District shall not be liable to any subcontractor for any expenses or liabilities incurred under the subcontract and that the Contractor shall be solely liable to the subcontractor for all expenses and liabilities under this Contract. All subcontractors are subject to the same background check requirements as are referenced in Exhibit A.

XI. Price Adjustments

Any price decrease effectuated during the Contract period because of market change or special sales offered to other customers shall be passed on to the District. This shall also apply to all in-place equipment on a rent or lease plan. Price increases are not accepted unless otherwise stated. All prices are firm and shall be held for the duration of the Contract term. The District may, at its sole discretion, review a request from the Contractor for an equitable adjustment in Contract pricing if pricing or supply availability is affected by extreme or unforeseen conditions in the marketplace outside of the Contractor's control. Requests shall be submitted to the District's Contract Manager along with justification and backup information, as necessary, such as a letter from a manufacturer regarding price increases. The District will consider the request and respond within 30 days. The Contractor shall continue to fill orders at the current Contract pricing until a decision has been made.

XII. Additions/Deletions

During the term of the Contract, the District reserves the right to add or delete the number of commodities or services when considered to be in its best interest. Pricing shall be comparable to the amounts awarded.

XIII. Other Conditions

A. Public Records

The Contractor agrees to (a) keep and maintain public records required by the Board to perform the service; (b) upon request from the Board's custodian of public records, provide the Board with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Florida Statute; (c) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Contract term and following completion of the Contract if the Contractor does not transfer the records to the Board; and (d) upon completion of the Contract, transfer, at no cost to the Board all public records in possession of the Contractor, or keep and maintain public records required by the Board to perform contractual obligations. If the Contractor transfers all public records to the Board upon completion of the Contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public record disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Contract, then the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the Board, upon request, in a format that is compatible with its information technology systems. The Board may unilaterally terminate the Contract for refusal by any Contractor to allow public access to all documents, papers, letters, or other material made or received by the Contractor in conjunction with the Contract unless the records are exempt from Section 24(a) of Art. I of the State Constitution and either Section 119.07(1), F.S. or Section 119.071, F.S. Additionally, the Contractor may be subject to penalties under Section 119.10, F.S.

If the Contractor has questions regarding the application of Chapter 119, Florida Statutes, to the Contractor's duty to provide public records relating to this Contract, contact the custodian of public records at:

Leon County Schools
ATTN: Julie Jernigan
2757 West Pensacola Street
Tallahassee, Florida 32304
Telephone: (850) 487-7177
Email: jerniganj@leonschools.net

B. Disputes

Any dispute concerning the performance of the terms of this Contract shall be resolved informally by the Contract Managers. Any dispute that cannot be resolved informally shall be reduced to writing and delivered to the District's Purchasing Director or designee. The District's Purchasing Director, or designee, shall decide the dispute, reduce the decision to writing, and deliver a copy to the Parties, the Contract Managers, and the District's Contract Administrator.

C. Notices

All notices required or permitted by this Contract shall be given in writing and by hand-delivery or email to the respective Parties. All notices by hand-delivery shall be deemed received on the date of delivery, and all

notices by email shall be deemed received when they are transmitted and not returned as undelivered or undeliverable. Both Parties may change their contact information and Contract Manager by written notice given to the other Party as provided above.

D. Insurance

The Contractor agrees to provide adequate insurance coverage on a comprehensive basis and to hold such insurance at all times during the existence of this Contract. The Contractor accepts full responsibility for identifying and determining the type(s) and extent of insurance necessary to provide reasonable financial protection for the Contractor and the District under this Contract. At a minimum, this coverage shall include general liability coverage of less than \$1 million per occurrence and \$2 million in aggregate. Upon the execution of this Contract, the Contractor shall furnish the District's Contract Manager, or designee, written verification of such insurance coverage. Such coverage may be provided by a self-insurance program established and operating under the laws of the State of Florida. The District reserves the right to require additional insurance where appropriate.

If the Contractor is a state agency or subdivision as defined in Section 768.28, F.S., the Contractor shall furnish the District, upon request, written verification of liability protection in accordance with Section 768.28, F.S. Nothing herein shall be construed to extend any Party's liability beyond that provided in Section 768.28., F.S.

E. Employee Status

This Contract does not create an employee/employer relationship between the Parties. It is the intent of the Parties that the District and Contractor are independent contractors under this Contract and neither is the employee of the other for all purposes, including, but not limited to, the application of the Fair Labor Standards Act minimum wage and overtime payments, Federal Insurance Contribution Act, the Social Security Act, the Federal Unemployment Tax Act, the provisions of the Internal Revenue Code, the State Workers Compensation Act, and the State unemployment insurance law.

F. Force Majeure

Neither Party shall be liable for loss or damage suffered as a result of any delay or failure in performance under this Contract or interruption or performance resulting directly or indirectly from acts of God, fire, explosions, earthquakes, floods, water, wind, lightning, civil or military authority, acts of public enemy, war, riots, civil disturbances, insurrections, strikes, or labor disputes.

G. Available Funding

The District's performance and obligation to pay for goods and services under this Contract are contingent upon available annual funding. The costs of services paid under any other Contract or from any other source are not eligible for reimbursement under this Contract.

H. Scrutinized Companies Contractor Certification

The Contractor certifies they are not listed on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, F.S., and they are not currently engaged in a boycott of Israel. If the resulting Contract exceeds \$1,000,000.00 in total (not including renewal years), the Contractor certifies that they are not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List created pursuant to Sections 215.473, F.S., and 215.4725, F.S., and further certifies they are not engaged in business operations in Cuba or Syria.

Pursuant to Sections 287.135(5), F.S., and 287.135(3), F.S., the Contractor agrees the District may immediately terminate the resulting Contract for cause if the Contractor is found to have submitted a false certification or if the Contractor is placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or has engaged in business operations in Cuba or Syria during the term of the resulting Contract. Any company that submits a bid or proposal for a Contract or intends to enter into or renew a Contract with an agency or local governmental entity for goods or services of any amount must certify that the company is not participating in a boycott of Israel.

CONTRACTOR:

Trane U.S., Inc.



Authorized Representative

General Sales Manager, North Florida

Title

5/8/2024

Date

SCHOOL BOARD OF LEON COUNTY, FL



Rosanne Wood, Board Chair

5/14/24

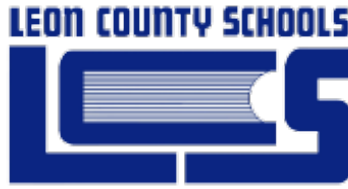
Date



Rocky Hanna, Superintendent

5/18/2024

Date



Request for Proposals (RFP)

Leon County Schools
Purchasing Department
3397 West Tharpe Street
Tallahassee, Florida 32303
purchasing@leonschools.net

HVAC Installation, Maintenance, and Repair Services RFP 256-2025

RFP Released: March 13, 2024

Deadline for Questions*: March 27, 2024

Proposals Due*: 2:00 p.m. on April 10, 2024

Nancy Scott

Procurement Officer

**Timeline subject to change. Changes will be communicated through an addendum to this RFP (see Section 1.8)*

RFP Timeline

| RFP Process Steps | Date and Time | Location (if applicable) |
|---|---------------------------|---|
| Release of RFP | March 13, 2024 | District Website https://www.leonschools.net/Page/4411 DemandStar https://www.demandstar.com |
| Written Questions Due | March 27, 2024 | Submit to: Nancy Scott, Procurement Officer Subject: RFP 256-2025 HVAC Installation, Maintenance, and Repair Services Email: purchasing@leonschools.net |
| Anticipated Posting of Answers to Submitted Questions | March 29, 2024 | District Website https://www.leonschools.net/Page/4411 DemandStar https://www.demandstar.com 17 |
| Sealed Proposals Due and Opened | April 10, 2024 at 2:00 pm | Submit to: Leon County Schools Purchasing Department Attn: Nancy Scott, Procurement Officer RFP 256-2025 HVAC Installation, Maintenance, and Repair Services 3397 W. Tharpe Street Tallahassee, FL 32303* <i>*Also the location for the Response Opening</i> |
| Evaluation Team Meeting | April 16, 2024 | Leon County Schools Purchasing Department 3397 W. Tharpe Street Tallahassee, FL 32303 |
| Anticipated Date the District will Advertise its Notice of Board Decision | April 30, 2024 | District Website https://www.leonschools.net/Page/4411 DemandStar https://www.demandstar.com |

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SECTION 1: Key Information



1.1 Quick Facts

The School Board of Leon County, Florida (hereinafter referred to as the “District”) is requesting sealed proposals from interested, available, and qualified firms to provide heating and air conditioning installation, maintenance, and repair services. The District does not guarantee to any Successful Proposer (hereinafter referred to as “Contractor”) a specific volume of work as a result of award.

- a. The use of capitalization (such as Proposer) denotes words and phrases with special meaning as defined in [Section 5, Definitions](#).
- b. All dates and times reflect Eastern Time (Tallahassee, Florida) unless otherwise indicated.
- c. The District reserves the right to perform, or cause to be performed, the services herein described in any manner it sees fit, including, but not limited to, award of other contracts, utilization of existing State or governmental contracts, public purchasing cooperatives, or to perform the work with its own employees.



1.2 Proposer Qualifications

Proposers shall maintain a permanent place of business, have adequate equipment to perform the requested services, be financially solvent, and maintain enough qualified personnel to perform the services of this Contract. Proposers shall provide necessary warranties, as appropriate, for the items they propose to furnish.

- A. The awarded Contractor(s) shall have a ***minimum of three (3) years experience within the last five (5)*** as a heating and air conditioning contractor, providing installation, maintenance, and repairs for commercial or governmental customers of the same nature as those sought by the District.
- B. At the time of submitting their proposal, and throughout the term of this Agreement, the Contractor shall hold and maintain an active certified license with the Department of Business and Professional Regulation of the State of Florida as a heating and air conditioning contractor. The Proposer shall submit copies of the license.
- C. At the time of submitting their proposal, and throughout the term of this Agreement, the Contractor must hold a valid Certificate of Prequalification from the Leon County School Board Construction and Facilities department. The Proposer shall submit copies of the qualifier’s LCS Prequalification Certificate, which shall be submitted with the bid proposal. Certificates must be renewed annually. **Proposals from firms not prequalified at the time of submittal will be deemed nonresponsive and will not be considered**



1.3 How to Contact Us (Procurement Rules and Information)

- a. All questions related to this RFP must be made in writing via email to the Procurement Officer listed below. Questions will only be accepted if submitted in writing on or before the date and time specified in the Timeline.

-
- b. On or about the date referenced in the Timeline, the District will advertise its answers to written questions on the District's website at <https://www.leonschools.net/Page/4411> and DemandStar at <https://www.demandstar.com/app/agencies/florida/leon-county-schools-purchasing-department/procurement-opportunities/ed9224e2-7a4c-4013-91a2-56aa6ed77478/>.
 - c. Between the release of the solicitation and the end of the 72-hour period following the advertisement of the Notice of Board Decision (the 72-hour period excludes Saturdays, Sundays, and District holidays), Proposers to this RFP or persons acting on their behalf may not contact any employee or officer of the Leon County School Board or Superintendent concerning any aspect of this solicitation, except in writing to the Procurement Officer as provided in this solicitation or directed by the District. Violation of this provision may be grounds for rejecting a Proposal.
 - d. Any person requiring special accommodations responding to this solicitation because of a disability should contact the LCS Purchasing Department at (850) 488-1206 at least five (5) days before any pre-solicitation conference, solicitation opening, or public meeting. Persons who are deaf, hard-of-hearing, deaf-blind, or speech-disabled may contact the LCS Purchasing Office by using the Florida Relay Service at 1-800-955-8771 (TTY/ASCII).
 - e. **The District's Procurement Officer**
Name: Nancy Scott, Procurement Officer
Purchasing Department
Leon County Schools
397 W. Tharpe Street
Tallahassee, FL 32303
Telephone: (850) 488-1206
Email: purchasing@leonschools.net
 - f. The Proposer shall not initiate or execute any decision or action arising from any verbal discussion with any District employee related to this RFP. Only written communications from the District's Procurement Officer and formal addendums are considered duly authorized expressions on behalf of the District. Additionally, only written communications from a Proposer are recognized as duly authorized expressions on behalf of the Proposer.
-



1.4 Developing Your Proposal

- a. This RFP is being issued as part of an open, competitive process and sets out the steps and conditions that apply.
 - b. Proposers should take the time to read and understand the RFP. In particular, they should:
 - 1. Review Title XLVIII, [K-20 Education Code](#), within the Florida Statutes.
 - 2. Develop a strong understanding of the District's requirements detailed in [Section 2](#).
 - 3. Ensure their company is on file and in good standing with the Florida Department of State, or provide certification of exemption from this requirement, as required for all entities
-

defined under Chapters 607, 617, or 620, Florida Statutes (F.S.), seeking to do business with the District.

- c. Proposers should prepare a clear and concise Proposal, avoiding complicated jargon and thoroughly describing their ability to meet the expectations of the District.
- d. Proposers must follow the format and instructions included in this RFP for their Proposal submittal.
- e. Proposals that contain provisions that are contrary to the material requirements of this RFP are not permitted. Including alternate provisions or conditions may result in the Proposal being deemed non-responsive to the solicitation.
- f. Proposers must use Attachment I (Cost Proposal Form) to submit pricing. Proposers shall not change or substantially alter the form but fill it out completely, as instructed in Section 3.2 of this RFP.
- g. Proposers should thoroughly review their Proposal before submission to ensure the Proposal is complete and accurate and it has provided all information requested in the format prescribed in Section 3, Procurement Rules and Information.
- h. The District is not liable for any costs incurred by a Proposer while responding to this RFP, including the costs associated with attending site visits, oral presentations, or negotiations, as applicable.
- i. Proposers are expected to submit questions or concerns they have regarding the requirements or terms and conditions of this solicitation during the question and answer phase, per Section 1.3, a.
- j. The District shall reject any and all Proposals that do not meet the following **pass/fail criteria (also referred to as Mandatory Responsiveness Criteria)**. Any Proposal rejected for failure to meet these requirements will not be evaluated further:
 - 1. The Proposal shall demonstrate that the Proposer is duly licensed in the State of Florida and has a minimum of three (3) years within the last five (5) years as a heating and air conditioning system contractor, doing installation, maintenance, and repairs for commercial or governmental customers of the same nature as those sought by the District;
 - 2. The Proposer shall submit a valid Certificate of Prequalification from the Leon County School Board Construction and Facilities department;
 - 3. The Proposer must confirm that all services to be provided under the Contract will be compliant with all laws, rules, and other authority applicable to providing the services, including, but not limited to, Florida's Open Government laws (Article I, Section 24, Florida Constitution, and Chapter 119, F.S.), Section 218.39, Florida Statutes, (F.S.) as defined in Chapter 10.800, Rules of the Auditor General; and
 - 4. The Proposer shall complete and submit Attachment I, Cost Proposal Form, Attachment II, Required Provisions Certification, Attachment III, Notice of Conflict of Interest, Attachment IV, Proposer Contact Information, and Attachment V, Proposers' References.



1.5 Submitting Your Proposal

- a. Proposers shall submit their Proposals in a sealed envelope or package with the RFP number and the date and time of the Proposal opening clearly marked on the sealed envelope or packaging. Proposers may submit their Proposals by mail, courier, delivery services (such as FedEx or UPS), or hand-delivery to the location below. **The District will not accept any Proposals submitted via email or fax.**
 - b. Proposers must mail or otherwise deliver their Proposals to the following address:
Leon County Schools
Purchasing Department
RFP 256-2025 HVAC Services
Attn: Nancy Scott, Procurement Officer
3397 W. Tharpe Street
Tallahassee, FL 32303
 - c. It is the Proposer's responsibility to ensure their Proposal is delivered to the District by the date and time stipulated in the Timeline. The District's clock will stamp Proposals received and shall provide the official time for the Proposal opening. **Late Proposals will not be accepted.**
 - d. Submit a Technical Proposal and a Cost Proposal in separately sealed and clearly labeled packages. The Cost Proposal may be shipped along with the Technical Proposal as long as it is sealed separately (such as in a sealed envelope) within the same shipping container and clearly marked.
 - e. Submit one (1) signed, original Technical Proposal, five (5) additional hardcopies, and five (5) electronic copies of the Technical Proposal in searchable PDF format on individual electronic storage devices or flash drives (not password protected). The original Technical Proposal will take precedence in the event there is a discrepancy between the original and the hard copies or electronic copies.
 - f. Submit one (1) signed, original Cost Proposal (Attachment I), three (3) additional hard copies, and one (1) electronic copy of the Cost Proposal in searchable PDF format on an electronic storage device or flash drive (not password-protected). The original Cost Proposal will take precedence in the event there is a discrepancy between the original and the hard copies or electronic copies.
 - g. The signed original Proposals shall be clearly marked as "Original," and the hardcopies shall be numbered one (1) through five (5).
 - h. If the Proposer includes information in their Proposal that they believe is and have marked as confidential or trade secret, the Proposer should submit one (1) redacted hard copy and one (1) redacted electronic copy in searchable PDF format (in addition to the non-redacted version) as outlined in Section 3.6.
 - i. Proposers are encouraged to print Proposal documents double-sided and minimize the use of non-recyclable materials.
-



1.6 Proposal Opening

- a. Proposals are due and will be publicly opened at the time, date, and location specified in the Timeline.
- b. District staff are not responsible for the inadvertent opening of a Proposal that is improperly sealed, addressed, or not correctly identified with the RFP number.
- c. After the Bid Opening, interested parties may submit a written request to the Procurement Officer for the names of all Proposers.



1.7 Disposition of Proposals

- a. The District reserves the right to withdraw this RFP at any time, and by doing so, it assumes no liability to any Proposer.
- b. The District reserves the right to reject any Proposals received in response to this RFP.
- c. The District reserves the right to waive Minor Irregularities when doing so would be in the best interest of the District. At its exclusive option, the District may correct Minor Irregularities but is under no obligation to do so.
- d. All documentation produced as part of this Proposal shall become the exclusive property of the District, may not be returned to or removed by the Proposer or its agents, and will become a matter of public record, subject to the provisions of Chapter 119, F.S. Selection or rejection of the Proposal will not affect this right. Should the District reject all Proposals and re-solicit, information submitted in response to this RFP will become a matter of public record as indicated in Section 119.071, F.S. The District shall have the right to use any ideas, adaptations of any ideas, or recommendations presented in any Proposal. The award or rejection of a Proposal shall not affect this right.



1.8 Changes to the RFP

The District will post all addenda and materials relative to this procurement on the District's Purchasing website at <https://www.leonschools.net/Page/4411> and on DemandStar at <https://www.demandstar.com/app/agencies/florida/leon-county-schools-purchasing-department/procurement-opportunities/ed9224e2-7a4c-4013-91a2-56aa6ed77478/>.

Interested parties are responsible for monitoring this site for new or changing information relative to this procurement. Proposers are responsible for ensuring that all addendums have been read and incorporated, as applicable, in their Proposal.



1.9 Protest Procedures

Per Section 120.57(3), F.S., a Notice of Intent to Protest or a Formal Written Protest must be filed with the District's Purchasing Department within the timeframes established in Florida Statutes. Filings may be made physically at 3397 W. Tharpe Street, Tallahassee, Florida 32305, or via email to bidprotests@leonschools.net. Protests must be made in compliance with Rules 28-110.003 and 28-

110.004, Florida Administrative Code (F.A.C.). Filings received on a weekend, District holiday, or after 5:00 p.m. will be filed the next business day.

Failure to file a protest within the time prescribed in Section 120.57(3), F.S., or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under Chapter 120, F.S.

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SECTION 2: Scope of Work

2.1 Background

The District and the School Board are created under Article IX, Section 4, of the Constitution of the State of Florida. The School Board is an independent taxing and reporting authority responsible for the operation, control, and supervision of all free public schools within the school district, subject to the Florida K-20 Education Code, Chapters 1000 – 1013, F.S. The Board consists of five (5) elected officials responsible for, among other things, the adoption of policies that govern the operation of District public schools. The elected Superintendent of Schools is responsible for the administration and management of the schools within the applicable parameters of state laws, State Board of Education Rules, and School Board policies.

The District provides a standard, traditional curriculum to a student body of approximately 31,000 students ranging from pre-kindergarten through the 12th grade. The District also provides adult education at several facilities during regular and non-school hours. In addition to the standard curriculum, the District offers a variety of specialized technical training programs for the higher grade levels.

2.2 Procurement Overview

Through this solicitation, the District is seeking competitive Proposals from experienced, professional, Licensed Mechanical Contractors to provide labor, parts and materials to perform preventive maintenance and repairs on heating and air conditioning systems and related components on an as needed basis district wide. The scope of work outlined in this RFP establishes the minimum requirements to be provided by the Awarded Contractor(s).

The District anticipates awarding multiple contracts for services as is in the District’s best interest. The Awarded Contractor(s) must have the ability to begin the implementation of services if awarded on or before July 1, 2024.

2.3 Contract Term

We anticipate that the Contract(s) will commence on July 1, 2024. The expected Contract terms and options to renew are:

| Description | Time Period |
|-----------------------------------|--|
| The initial term of the Contract | Three (3) years |
| Optional Contract Renewal Term(s) | Up to three (3) years, or portions thereof |
| Maximum term of the Contract | Six (6) years |

2.4 Scope of Work

The District is seeking qualified licensed Mechanical Contractors to furnish all materials, services, supervision, technicians, materials transportation, equipment, tools, and any incidentals necessary to provide installation, maintenance, and miscellaneous heating and air conditioning service repairs, as needed district-wide. Awarded Contractors may be required to repair, alter, remodel, add to, subtract from, or improve any previous heating and air conditioning equipment or facility. All repair work shall be permanent.

All preventive maintenance, repair, and installation of heating and air conditioning equipment and performance of heating and air conditioning services shall follow the following standards:

- Florida Building Code (FBC).
 - Occupational Safety and Health Administration (OSHA); and
 - Occupational Safety and Health Administration (OSHA).
- a. The awarded Contractor is responsible for the protection of all buildings, structures, and utilities that are under or above ground or on the surface from their operations that may be hazardous and/or damaging to said facilities.
 - b. The awarded Contractor is responsible for the protection of all students, visitors, and Board personnel against hazards and/or injuries due to their operations at the work site.
 - c. The awarded Contractor shall not block exits, hallways, corridors, driveways, or delivery areas nor impede ingress or egress.
 - d. The awarded Contractor shall not impede nor interfere with the normal function of the facility, its occupants, or programs.
 - e. The awarded Contractor shall ensure frequent pick-up of all refuse, rubbish, scrap materials, and debris that result from their operations so that the work site presents a neat and orderly appearance at all times. All rubbish, scrap, etc., shall be transported from the premises. At the completion of work, the contractor shall remove all work materials, tools, equipment, and surplus materials from the work site and leave the project in ready-to-use condition. The Board is not responsible for the loss of tools or supplies.
 - f. The awarded Contractor shall liaise with the District project coordinator to schedule maintenance, repairs, and installations. Under no circumstances shall any delivery or repair be attempted before proper clearance has been obtained from the District project coordinator.
 - g. To minimize interruption of normal operations, removal and disposal of old equipment shall be done immediately by the awarded Contractor as requested by the District. The awarded Contractor shall install the new equipment on the same day as the removal of the defective equipment. The awarded Contractor is to dispose of defective equipment in accordance with all local Statutes and laws regarding dumping. Under no conditions is the awarded Contractor to use any District bin or trash container to dispose of such items. The District reserves the right to remove parts from equipment for future utilization prior to equipment disposal.

2.4.1 Service Requirements

- a. The contractor(s) shall provide, complete maintenance, service, repair, and/or replacement and other services, including but not limited to the following equipment, parts, and system requirements; inspections, testing, maintenance, calibration, repair or replacement, adjustment, electrical equipment, heating elements, motors, electrical wiring up to 6 feet from point of connection, enthalpy wheel(s), damper(s), pressure relief, discharge plenum and duct interphase, terminals, microprocessor, outside air louver, fans, coupling, shafts, fan blades, belts, pulleys, and bearings, coil(s), refrigerant piping, thermostats, thermostat programming, thermostat battery, humidistat, expansion valves or metering device, interior and exterior caulking and sealing, condensate drains branches to storm drain main connection, compressors, filters, dryers, starters,

solid state starters, contactors, relays, equipment disconnect switches, variable speed drives, breakers, fuses, timers, switches, including resealing of fiberglass insulation and edges with proper white breather weather barrier mastic.

- b. Routine service will be initiated by the District and will be in accordance with OEM specifications and the terms of this contract. When a call is placed for routine service, the contractor will be required to respond to this service request within forty-eight (48) hours.
- c. Insulation removed for maintenance or dislodged by age shall be reinstalled in a manner consistent with manufacturer's instructions for application and shall be properly sealed with mastic for permanency and so no fiberglass is in contact with the airstream. Tape is not allowed to be used to seal insulation.
- d. Primer and paint shall be applied where required to prevent deterioration of the equipment.
- e. The Contractor(s) shall be responsible for any ceiling, walls, electrical system, floor and/or duct repairs, in addition to the equipment and its access panels, damaged as a result of equipment or panel removal for servicing.
- f. The contractor(s) shall ensure that all access panels and screws are installed and fit correctly after servicing equipment.

2.4.2 Administrative Procedure

The awarded Contractor(s) will provide, as requested by authorized District staff, job estimates or quotes at no charge to the District. The Contractor must respond to project quote requests with a written quote within two (2) business days. It is the intention of the District to contract with the most qualified and responsive Contractor able to expeditiously complete the project at a competitive cost to the Board. At the District's discretion, competing quotes may be solicited for individual projects. The awarded pricing from this Contract(s) will be the basis for all invoicing/billing for goods and services provided under this Contract. Vendors may submit quotes for prices lower than the contracted rates but may not exceed the proposed rates.

When requesting a project quote:

- a. The Contractor shall be notified of the project and site location.
- b. When necessary, a mutually agreed upon date and time shall be arranged between the Contractor and District project coordinator responsible for overseeing the project.
- c. After a general overview of the project is given to the Contractor on site or verbally, the Contractor shall prepare a written proposal on the Contractor's letterhead to include but not limited to:
 - i. A brief description of the work to be completed
 - ii. The number of labor hours estimated to complete the project (Travel time will not be considered in the calculation of elapsed time).
 - iii. The material and/or equipment cost estimate, if applicable
 - iv. The District will assume responsibility for any and all fees associated with permitting.

- d. Upon acceptance of the job estimate, the District will issue a purchase order. At no time should work commence without an authorized purchase order with the exception of a District approved designated emergency.
- e. The Contractor will be requested to perform the project-specific duties as assigned. The timeframe of each project will be “as required” and at the direction of the District project coordinator. The project will be deemed complete when the work has been reviewed and approved by the project coordinator or his designee.
- f. Once completed, the contractor should submit to the project coordinator or his designee an itemized invoice showing date, location, and hourly labor rates for all position titles and materials (cost to include a copy of original invoice and mark-up) necessary for project completion.
- g. If the Contractor does not wish to issue a quote or cannot meet the requirements of the project, inclusive of the time given in which to complete the job, the Contractor shall respond in writing with a “No Quote” and provide an explanation as to why they are not submitting a quote. Any Contractor that fails to submit a request for a quote successively three (3) times in a row may have their contract canceled due to non-performance.

2.4.3 Personnel

The awarded Contractor is required and shall have the capability to simultaneously perform work at multiple locations throughout the District when requested to do so. The awarded Contractor shall, at the time of submitting their Proposal and throughout the term of the Contract, employ at least two (2) full time technicians that are properly trained and certified in refrigerant handling, recovery, and storage. Technicians shall have successfully completed the EPA Universal Refrigerant Transition and Recovery Certification Program and shall be so certified. The vendor shall submit with their proposal, copies of all technicians’ EPA Universal Refrigerant Transition and Recovery Certification. Technicians must be capable of performing installation, repairs, and routine maintenance services on the current and future HVAC equipment in the District. The awarded Contractor shall supply the technicians with all the appropriate equipment, tools, transportation, and training to properly repair, install, and maintain District HVAC equipment in accordance with the RFP.

2.4.4 System Failure

Should any of the contractor(s) activities result in HVAC system failure, or shutdown of any part of the air conditioning system, the vendor is required to immediately inform the District project coordinator and follow up with a written notice within twenty-four (24) hours. The written notification shall state the reason the equipment is not in service, when repairs will be completed and the system back in full operation. The contractor shall make every effort to expedite the service and minimize the disruption (the cooling effectiveness) to the location being serviced and shall employ every ordinary and extraordinary effort to minimize loss of air conditioning time.

2.4.5 System Condition

Whenever services are provided, the contractor shall ensure that the HVAC equipment and systems are left in an operable condition. The contractor shall document all services performed and submit said documentation with their invoice for services.

2.4.6 Equipment Safety

All equipment operated on any school district site shall be equipped with guards and/or shields to minimize the possibility of injury to the operator or the general public. Machinery not equipped with safety devices shall not be operated at any facility housing students, staff or other personnel. No

power equipment shall be operated in the vicinity of students during periods such as class change, recess, fire drills, etc. Proper and safe operation of all equipment is the contractor's responsibility.

2.4.7 Contractor Accessibility

Contractor shall be accessible by a Leon County toll free local telephone call during regular business hours. Local off-hours answering service for emergencies shall be available for contractor notification twenty-four (24) hours a day, seven (7) days per week, all year, including holidays. The expected two (2) hour response time from initial call notification is required during business days from 7:00 AM to 5:00 PM. If the contractor is notified after business hours, or notification would result in an arrival after 7:00 PM, response time shall be expected the next business day at 7:00 AM provided a two (2) hour time window was provided from notification to expected response time.

2.4.8 Working Day

The normal working hours for the District are between 7:00 a.m. and 5:00 p.m., Monday through Friday. Projects will be mutually scheduled as required as in the District's best interests. Such scheduling will include off hours, weekends, and holidays.

2.4.9 Overtime

The awarded Contractor(s) must be available to provide service after normal working hours. Overtime rates as quoted on the Cost Proposal Form shall be paid for all hours worked after 5:00 p.m. and before 7:00 a.m. on weekdays and any work performed on weekends and holidays. Any contemplation of overtime hours must be pre-approved by the District project coordinator.

2.4.10 Emergency Service

In the case of a designated emergency, the awarded contractor must be able to respond to an emergency call within two (2) hours. These specifications define emergency service as an unexpected situation or occurrence that demands a two (2) hour response by the contractor due to acts of nature or any situation that affects the safety of persons or property as declared at the sole discretion of the District Project Coordinator.

2.5 Warranty

- a. A minimum one (1) year warranty shall apply to all Contractor-furnished and installed parts, materials, supplies and/or equipment. The warranty shall cover the cost of any and all parts, materials, supplies and/or equipment as well as related labor in addition to required warranties as stated in technical specifications. As part of your Proposal, your response shall clearly acknowledge your warranty policy period, exclusions, and acceptable warranty repair rates.
- b. Maintenance work shall be warranted for a period of ninety (90) days, and the contractor(s) shall remedy any defects for a minimum of ninety (90) days from the date of final acceptance. All labor and materials used shall be documented on the contractor(s) service reports. Unless otherwise specified, warranty repairs shall be corrected immediately upon receipt of the written or oral notice.
- c. Some or all equipment or parts covered under this Agreement may be under Warranty. The awarded Contractor(s) will be held responsible for dealing with the Contractor and/or the OEM for all warranted equipment from the date of award. The awarded Contractor will be responsible for obtaining warranty work and/or parts from the appropriate party, providing labor as necessary, for all of the air conditioning equipment. However, the equipment shall be considered "as is" and shall be covered under this Agreement as of the effective date.

2.6 Reassignment of Work

The District reserves the right and authority to reassign work to another Contractor at any time for reasons to include, but not limited to:

- a. The assigned Contractor cannot comply with the specifications in cases of an emergency.
- b. The assigned Contractor cannot respond to the job requirements at the time due to scheduling conflicts, staffing considerations, or other reasonable cause(s) for preventing their completion of the project as required.
- c. The District shall have the option to solicit additional quotes, bids, or even professional opinions about a particular project and could engage the services of another heating and air conditioning system company/contractor when in its best interest.

2.7 Equipment/Materials Acquisition

The District is requesting a percentage (%) of the materials' mark-up price from each bidder. The District will not accept any materials markup pricing that is in excess of 10% of the awarded Contractor(s) actual cost for the materials. The markup percentage may not be applied to any amount the vendor pays in sales tax for the materials or equipment. The awarded Contractor(s), upon request, must provide the original invoice showing the Contractor's actual cost for any equipment as provided. Further, the District reserves the right to acquire by its own means any equipment or materials necessary to perform the scope of work of this RFP.

2.8 Invoice and Payment

The Contractor shall submit monthly invoices by the 10th of the month for work performed the prior month. Invoices should contain sufficient detail for a pre and post-audit.

The District's payment terms are net 30 days from receipt of a properly detailed and accurate invoice.

2.9 Performance Monitoring

The District may utilize any or all of the following methodologies in monitoring the Successful Proposer(s) performance under the Contract and in determining compliance with Contract terms and conditions.

- a. On-site reviews of work performed;
- b. Documentation/review of timely response to work requests;
- c. Documentation/review of timely completion of work as assigned; and
- d. Documentation/review of invoices

The Contract Manager will provide a written monitoring report to the Successful Proposer within 30 days of a monitoring visit. Non-compliance issues identified by the Contract Manager will be described in detail to provide the Successful Proposer(s) the opportunity for correction, where feasible.

Within ten calendar days of receipt of the District's written monitoring report, the Successful Proposer shall provide a formal Corrective Action Plan (CAP) to the Contract Manager (email acceptable) in response to all noted deficiencies to include responsible individuals and required time frames for achieving compliance. Unless specifically agreed upon in writing by the Contract Manager, time frames for compliance shall not exceed 30 calendar days from the date of receipt of the monitoring report by the

Successful Proposer. CAPs that do not contain all the information required shall be rejected by the Contract Manager in writing. The Successful Proposer shall have 15 calendar days from the receipt of such written rejection to submit a revised CAP; this will not increase the required time for achieving compliance. All noted deficiencies shall be corrected within the time frames identified in the CAP or as amended with prior approval of the District. If deficiencies are not corrected within the approved timeframe, the District will impose a financial consequence of \$100 per day until corrected. The Contract Manager may conduct follow-up monitoring at any time to determine compliance based on the submitted CAP.

Any Contractor that has documented non-compliance issues without resolution one or more times may have their contract cancelled due to non-performance. Contract cancellation will be at the sole discretion of the District.

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SECTION 3: Procurement Rules and Information

3.1 Contents and Format of Proposal Submittals

Proposals are to be organized in TABs as directed below. Proposers shall include all the requested information in each TAB, or their Proposal may be deemed non-responsive. Additionally, information included in the incorrect section may not be scored by the District's Evaluation Team.

a. TAB A Overview

1. Cover Letter

A cover letter on the Proposer's letterhead with contact information and the name and signature of the representative of the responding organization authorized to legally obligate the Proposer to provide the services requested. If the Proposer is a subsidiary company, the name of the parent company shall be included. Finally, the cover letter must state that the Proposer agrees to provide the services as described in their Proposal and the RFP;

2. Executive Summary

Submit a brief executive summary stating the Proposer's understanding of the nature and scope of the services to be provided and the capability to comply with all terms and conditions of the RFP. No pricing information is to be included in the executive summary;

3. Financial Interest

Please include a list of any Board/District employees or officials that have a material financial interest (over 5%) using Attachment III, Section 2. Please include the employee/official's name, title/position, and the date they filed the required Conflict of Interest Statement with the Leon County Supervisor of Elections before the Proposal Opening.

b. TAB B Experience and Organization

1. References

Proposers shall provide at least three (3), but not more than five (5), references from commercial or governmental agencies for whom the Proposer has provided services of the same nature as those sought by the District. References should reflect current or recent experience and must support the experience requirements of this RFP. To qualify as current/recent experience, services described by references shall be ongoing or shall have been completed within the 12 months preceding the issuance date of this RFP.

Each reference shall be completed and signed by the individual offering the reference and certified by a notary public, using Attachment V, Proposer's Reference Form. Current or former employees of the District or current or former members of the Board may not be used for more than one reference. The District reserves the right to contact reference sources listed or previous clients not listed in the Proposer's Proposal.

2. Narrative Record of Past Experience

As indicated in Section 1.4(j) of this RFP, it is a Mandatory Responsiveness Requirement that the awarded Contractor(s) shall have a minimum of three (3) years within the last five (5) years as a heating and air conditioning system contractor doing installation, maintenance, and repairs for

commercial or governmental customers of the same nature as those sought by the District. The details of the Proposer's experience meeting this requirement shall be provided in narrative form and with enough detail for the District to determine its complexity and relevance. Specifically, a Proposer shall include the following:

- a. A description of experience providing services similar in nature to the services sought in this RFP;
- b. The specific length of time the Proposer has provided similar services and where services were provided;
- c. Proposers shall identify any suspension, revocation, or review of the Proposer's licensure in the last five (5) years. Proposers shall also disclose any bankruptcies, judgments, or liens within the last five (5) years.
- d. Disputes: Proposers shall identify all contract disputes they (or their affiliates, subcontractors, agents, etc.) have had with any customer within the last three (3) years relating to contracts under which they provided services similar in nature to those described herein. This shall include any circumstance involving the performance or non-performance of a contractual obligation that resulted in (i) identification by the contract customer that the Proposer was in default or breach of a duty under the contract or not performing obligations as required under the contract, (ii) the issuance of a notice of default or breach; (iii) the institution of any judicial or quasi-judicial action against the Proposer as a result of the alleged default or defect in performance; or (iv) the assessment of any fines, liquidated damages, or financial consequences. Proposers must indicate whether the disputes were resolved and, if so, explain how they were resolved.
- e. Subcontractor Information: If the Proposer plans to use subcontractors to provide any performance under the Contract, the Proposer shall include detailed information for all subcontractors with whom it plans on contracting. This information shall be provided using Attachment VII, Subcontracting Form. And shall, at a minimum, include the following: name, contact information, the service(s) subcontractor will be providing under the prospective contract, the number of years the subcontractor has provided services, projects of similar size and scope to the services sought via this RFP the subcontractor has provided, and all instances of contractual default or debarment (as a prime or subcontractor) the subcontractor has had in the past five (5) years.

1. Contractor Annual Prequalification Certificate

The Proposer must provide a valid Certificate of Prequalification from the Leon County School Board Construction and Facilities department.

2. Staff Assignments and Certifications

The Proposer shall provide resumes or job descriptions for all positions assigned to the Contract along with copies of any relevant certifications/licensure for staff that will be providing the on-site services contemplated in this RFP.

a. TAB C Required Forms

Proposers shall complete the following forms:

1. The completed, notarized Attachment II, Required Provisions Certification, signed by the authorized representative who signs the above-mentioned cover letter;
2. Completed Application for Vendor Status*, and associated forms (<https://www.leonschools.net/cms/lib/FL01903265/Centricity/Domain/195/FORMS/Application%20for%20Vendor%20Status-ACH%20forms%20FEB%202021.pdf>);
3. Attachment III, Notice of Conflict of Interest
4. Attachment IV, Vendor Contact Information
5. Attachment V, Proposer's Reference Form
6. Attachment VI, Local Preference Affidavit (if applicable)
7. Attachment VII, Subcontracting Form (if applicable)
8. Attachment VIII, Drug-Free Workplace Certification (if applicable)
9. Attachment IX, Certification Regarding Debarment
10. Attachment X, Certification Regarding Lobbying

***Please note if the Vendor is already registered with the District, it does not need to submit another application.**

3.2 Cost Proposal Submittals

Each Proposer shall complete and submit Attachment I, Cost Proposal Form, indicating pricing for services as detailed. The Cost Proposal Form shall NOT be included in the Proposer's Technical Proposal. The Cost Proposal Form shall be provided in a separate, sealed envelope. This envelope may be included in the shipping package with the Proposer's Technical Proposal; however, it must be separately sealed within the package. While factors that contribute to cost may be discussed in the Proposer's Proposal, actual pricing shall only be included in the Cost Proposal. The inclusion of price information in the Technical Proposal will result in finding the Proposal non-responsive.

3.3 Proposal Evaluation and Criterion

Failure to respond, provide detailed information, or provide requested Proposal elements will result in the reduction of points in the evaluation process. The District will reject any Proposal containing material deviations from the RFP. The District may waive any minor irregularities and technicalities. If only one responsive Proposal is received, the Team may negotiate the best terms and conditions with that sole Proposer or may recommend the rejection of all proposals as permitted by Section 6A-1.012(12)(c), F.A.C. The evaluation process will be conducted as described below. Evaluation of Proposals will be based on an average of the Evaluation Team Member's points (for sections evaluated by the Team).

3.3.1 Responsiveness Determination: Each Proposal will be reviewed by the District's Purchasing Department to determine if the Proposal meets the mandatory responsiveness criteria as listed in Section 1.4(j) of the RFP. Proposals deemed non-responsive will not be further evaluated nor

be considered for award. The individual responsible for this portion of the evaluation is not a member of the Evaluation Team.

3.3.2 Cost Evaluation: The District's Purchasing Department will review and assign Cost Points based on the formula below:

| Cost Component | Cost Points |
|---|------------------|
| Hourly Labor Cost Total (Straight Time) | 20 |
| Hourly Labor Cost Total (Overtime) | 5 |
| Materials Markup % Over Cost | 5 |
| TOTAL COST POINTS AVAILABLE | 30 points |

For Cost Points, the Vendor submitting the lowest Cost will receive the total points available. All other Proposals will receive Cost Points according to the following formula:

$$(N / X) \times \text{Cost Points Available} = Z$$

Where:

N = Lowest Price received by any Proposal

X = Vendor's Proposed Price

Z = Total Cost Points Awarded

3.3.3 Evaluation Team: This step evaluates the strengths of the companies that have responded to the RFP. The Team will score the Proposals using the evaluation criterion below.

| Evaluation Criterion | Maximum Assigned Points |
|--|---|
| CRITERION 1: Business Experience <ul style="list-style-type: none"> To what extent does the Vendor's corporate structure, past performance, and qualifications demonstrate an ability to provide quality heating and air conditioning system contractor services? Financial viability and stability To what extent does the Vendor demonstrate stability in providing prior contractual services? To what extent does the Vendor demonstrate the ability to comply with required licensing requirements, including past licensing issues? | <p>Excellent 30</p> <p>Good 22.5</p> <p>Fair 15</p> <p>Poor 7.5</p> <p>Unsatisfactory 0</p> |

| Evaluation Criterion | Maximum Assigned Points |
|---|--|
| CRITERION 2: Staffing and Qualifications a. To what extent does the Vendor’s proposed staff reflect the experience required in this RFP? o Does the proposed staff and staffing model appear appropriate to meet the services sought in the RFP? | Excellent 30 Good 22.5 Fair 15 Poor 7.5 Unsatisfactory 0 |
| CRITERION 3: Quality of References • To what extent do the Vendor’s references demonstrate its ability to provide services under a Contract? • How well do the Vendor’s recent clients compare to the size or scope of the services the District is seeking? | Excellent 30 Good 22.5 Fair 15 Poor 7.5 Unsatisfactory 0 |

| Scored by LCS Purchasing Department | |
|---|---|
| CRITERION 5: Cost Points | Points to be assigned per Section 3.3.2 |
| Local Preference (Board Policy 6450) | 10 |
| Small Business Certification (Board Policy 6325) | 5 |

3.3.4 Score Computation: All scores will be calculated (sections scored by the Team will be averaged per criterion) and combined for a Grand Total Score. The table below provides scoring guidelines to be used by the District’s Evaluation Team members when allocating points:

| Score | Score Description |
|------------------|--|
| Excellent | Exceeds expectations for effectiveness and responsiveness to the requirement. “Excellent” is defined as a proposal to a specific criterion that is extensive, detailed, and exceeds all requirements and objectives of the solicitation, with a high probability of meeting the requirements with little or no risk to the School District. “Excellent” also demonstrates a complete understanding of the requirements, with the approach significantly exceeding performance and/or capability standards, has several exceptional strengths, shows no weaknesses, and will require normal contractor effort and project monitoring. |

| | |
|-----------------------|---|
| Good | Above minimum performance, effective and responsive to the requirement. “Good” is defined as a proposal that generally exceeds requirements in minor areas; therefore, it has a good probability of meeting the requirements with little risk to the School District. “Good” also demonstrates a good understanding of the requirements, and the approach exceeds the performance or capability standards with one or more strengths that will benefit the School District. Weaknesses will have little potential to cause a disruption of schedule, an increase in cost, or a degradation of performance. Normal contract effort and project monitoring will be required to overcome any difficulties. |
| Fair | Minimally acceptable performance standards and responsive to the requirement. “Fair” is defined as a proposal that generally meets the requirements. “Fair” demonstrates an acceptable understanding of the requirements, and the approach meets the performance or capability standards with no obvious strengths that will benefit the School District. Weaknesses will have the potential to cause a disruption of schedule, an increase in cost, or a degradation of performance. Special contractor emphasis and close monitoring will probably minimize any difficulties of risk. |
| Poor | Responsive to the requirement but below acceptable standards. “Poor” is defined as a proposal that demonstrates a limited understanding of the requirements includes minor omissions, and the approach barely meets the performance or capability standards necessary for minimal contract performance. “Poor” demonstrates a misunderstanding of the requirements that may be corrected or resolved through discussions without a complete revision of the Proposal. Weaknesses can potentially cause some disruption of schedule, increase in cost, and/or degradation of performance even with special contractor emphasis and close project monitoring. |
| Unsatisfactory | Not responsive to requirements. “Unsatisfactory” is defined as a proposal not meeting the requirements without major revisions and proposes an unacceptable risk. “Unsatisfactory” demonstrates a misunderstanding of the requirements; the approach fails to meet performance or capability standards and contains major omissions and inadequate detail to assure the evaluator that the Proposer understands the requirement. |

3.4 Advertising Notice of Board Decision

A Contract will be awarded to the Responsive and Responsible Vendor(s) who receive the highest Final Score, considering price and other requirements as set forth in Section 3.3. The District reserves the right to award one (1) or more Contracts, in whole or in part, for the services sought in this RFP. The District reserves the right to accept or reject any and all offers or separable portions and to waive any Minor Irregularity, technicality, or omission if the District determines doing so will serve the best interest of the Board.

As in any competitive solicitation, the Board shall advertise a public notice of Board Decision when the Board has decided on the outcome of the solicitation, including, but not limited to, a decision to award a Contract(s), reject all Proposals, or to cancel/withdraw the RFP.

The Notice of Board Decision will be advertised on or about the date shown in the Timeline and will remain posted for a period of 72 hours (Saturdays, Sundays, and District holidays shall be excluded in the computation of the 72-hour period).

3.5 No Prior Involvement and Conflicts of Interest

Any Proposer who participated through decision, approval, disapproval, recommendation, preparation of any part of the purchase, influenced the content of the solicitation, rendered advice, investigated, audited, or served in any other advisory capacity is ineligible to participate in this solicitation.

Additionally, no Proposer shall compensate in any manner, directly or indirectly, any officer, agent, or employee of the District for any act or service which he/she may do or perform for, or on behalf of, any officer, agent, or employee of the Proposer. No officer, agent, or employee of the District or Board shall have any interest, directly or indirectly, in any Contract or purchase made, or authorized to be made, by anyone for, or on behalf of, the Board. The Proposer shall have no interest and shall not acquire any interest that shall conflict in any manner or degree with the performance of the services required under this RFP.

Certification and acceptance of this provision is incorporated in Attachment II, Required Provisions Certification.

3.6 Confidentiality, Proprietary, or Trade Secret Material

The District takes its public records responsibilities as provided under Chapter 119, F.S., and Article I, Section 24 of the Florida Constitution very seriously. If the Proposer considers any portion of the documents, data, or records submitted in response to this solicitation to be confidential, trade secret, or otherwise not subject to disclosure under Chapter 119, F.S., the Florida Constitution, or other authority, the Proposer must also simultaneously provide the District with a separate redacted copy of its Proposal and briefly describe in writing the grounds for claiming exemption from the public records law, including the specific statutory citation for such exemption. This redacted copy shall contain the District's solicitation name, number, and the name of the Proposer on the cover and shall be clearly titled "Redacted Copy." The redacted copy shall be provided to the District at the same time the Proposer submits its Proposal to the solicitation and must only exclude or redact those exact portions that are claimed confidential, proprietary, or trade secret. The Proposer shall be responsible for defending its determination that the redacted portions of its response are confidential, trade secret, or otherwise not subject to disclosure. Further, the Proposer shall protect, defend, and indemnify the District for any and all claims arising from or relating to the Proposer's determination that the redacted portions of its response are confidential, proprietary, trade secret, or otherwise not subject to disclosure. If the Proposer fails to submit a Redacted Copy with its Proposal, the District is authorized to produce the entire documents, data, or records submitted by the Proposer in answer to a public record request for these records. In no event shall the District, Board, or any of its employees or agents be liable for disclosing or otherwise failing to protect the confidentiality of information submitted in response to this solicitation.

3.7 Small Business Participation

This RFP, in the evaluation phase, is subject to the small business development provisions specified in Board Policy 6325. If the Proposer is considering using subcontractors, the District highly encourages the use of small business vendors.

3.8 Local Business Preference

This RFP, in the evaluation phase, is subject to the local preference provisions specified in Board Policy 6450. If the Proposer is considering using subcontractors, the District highly encourages the use of local business vendors

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SECTION 4: Contract Terms and Conditions

4.1 Contract Modifications

During the term of the Contract, the District may unilaterally require changes (altering, adding to, or deducting from the specifications) provided such changes are within the general scope of this solicitation. The Contractor may request an equitable adjustment in the price(s) or delivery date(s) if the change affects the cost or time of performance. Such equitable adjustments require a formal contract amendment. The District shall provide written notice to the Bidder 30 days in advance of any Department-required changes to the technical specifications and/or scope of service that affect the Bidder's ability to provide the service as specified herein. Any changes, other than purely administrative changes, will require a written change order or formal Contract amendment.

The District will authorize additional services on an individual basis. The District would jointly determine with the Contractor a "not to exceed" price for each additional project using the contractually established hourly rates.

4.2 Use by Other Public Agencies

Pursuant to their own governing laws and subject to the agreement of the Contractor, other entities may be permitted to make purchases at the terms and conditions contained herein. Any such purchases are independent of the agreement between the District and Contractor, and the District shall not be a party to any transaction between the Contractor and any other purchaser.

The District hereby notifies interested parties that the Florida Department of Management Services purchasing agreements and state term contracts have been reviewed for the goods and services contemplated by this solicitation, and the District has determined conducting our own solicitation is in our best interest.

4.3 Travel Expenses

The District shall not be responsible for the payment of any travel expenses incurred by Proposers due to this RFP or Contract.

4.4 E-Verify

Per Executive Order 11-116, "The provider agrees to utilize the U.S. Department of Homeland Security's E-Verify system, <https://e-verify.gov/employers>, to verify the employment eligibility of all new employees hired during the contract term by the Provider. The Provider shall also include a requirement in subcontracts that the subcontractor shall utilize the E-Verify system to verify the employment eligibility of all new employees hired by the subcontractor during the contract term." Contractors meeting the terms and conditions of the E-Verify System are deemed to comply with this provision.

Beginning January 1, 2021, every public employer, contractor, and subcontractor shall register with and use the E-Verify system to verify the work authorization status of all newly hired employees. A public employer, contractor, or subcontractor shall not enter into a contract unless each party to the contract registers with and uses the E-Verify system per Section 448.095, F.S.

4.5 Subcontracts

The Contractor may, only with the prior written consent of the District, enter into written subcontracts for the delivery or performance of services as indicated in this RFP. Anticipated subcontract agreements known at the time of Proposal submission must be identified in the submitted Proposal using Attachment VII, Subcontracting Form. If a subcontract has been identified at the time of submission, a copy of the proposed subcontract must be submitted to the District. No subcontract, which the Contractor enters into concerning the performance of any of its functions under the Contract, shall in any way relieve the Contractor of any responsibility for the performance of its duties. All subcontractors, regardless of function, providing services on District property shall comply with the District's security requirements, as defined by the Board, including background checks, compliance with Board Policy 2.021, the Jessica Lunsford Act, and all other Contract requirements. All payments to subcontractors shall be made by the Contractor.

If a subcontractor is utilized by the Contractor, the Contractor shall pay the subcontractor within seven (7) working days after receipt of full or partial payments from the District, per Section 287.0585, F.S. It is understood and agreed that the District shall not be liable to any subcontractor for any expenses or liabilities incurred under the subcontract and that the Contractor shall be solely liable to the subcontractor for all expenses and liabilities under the Contract. Failure by the Contractor to pay the subcontractor within seven (7) working days will result in a penalty to be paid by the Prime Contractor to the subcontractor in the amount of one-half ($\frac{1}{2}$) of one percent (1%) of the amount due per day from the expiration of the period allowed herein for payment. Such penalty shall be in addition to actual payments owed and shall not exceed fifteen percent (15%) of the outstanding balance due.

4.6 Background Screening Requirements/Jessica Lunsford Act

Florida Statutes contain certain fingerprinting and/or screening requirements pertaining to all persons or entities entering into contracts with Schools, School Boards, School Districts, and Charter Schools who may have personnel who will be on school grounds when students may be present. Any individual who fails to meet the statutory requirements shall not be allowed on school grounds. Failure to comply with the statutory requirements will be considered a material default of this Contract. The Contractor shall bear all costs associated with background screening.

District Contact

Donald Kimbler

Leon County Schools Safety & Security

Monday-Friday (excluding District holidays), 8:00 a.m. – 5:00 p.m.

Phone: (850) 487-7293

Email: kimblerd@leonschools.net

4.7 Insurance

Below are the minimum insurance requirements the Contractor(s) must maintain:

- a. General Liability: Limits not less than \$1,000,000 per occurrence for Bodily Injury/ Property Damage; \$1,000,000 General Aggregate. Limits not less than \$1,000,000 for Products/Completed Operations Aggregate.
- b. Professional Liability/Technology Errors & Omissions: Limit not less than \$1,000,000 per occurrence covering services provided under this Contract.
- c. Workers Compensation: Florida Statutory limits in accordance with Chapter 440, F.S.; Employer's Liability limits not less than \$100,000/\$100,000/\$500,000 (each accident/disease-each employee/disease-policy limit).
- d. Auto Liability: Owned, Non-Owned, and Hired Auto Liability with Bodily Injury and Property Damage limits of not less than \$1,000,000 Combined Single Limit. If the Contractor does not own any vehicles, hired and non-owned automobile liability coverage in the amount of \$1,000,000 shall be accepted. In addition, an affidavit signed by the Contractor must be furnished to the District indicating the following: *"(Contractor Name) does not own any vehicles. In the event the insured acquires any vehicles throughout the term of this agreement, the insured agrees to provide proof of "Any Auto" coverage effective the date of acquisition."*
- e. Acceptability of Insurance Carriers: The insurance policies shall be issued by companies qualified to do business in the State of Florida. The insurance companies must be rated at least A-VI by AM Best or Aa3 by Moody's Investor Service.
- f. Verification of Coverage: Proof of insurance must be furnished within fifteen (15) days of the award of the contract.
- g. Required Conditions: Liability policies must contain the following provisions. In addition, the following wording must be included on the Certificate of Insurance:

The School Board of Leon County, Florida, its members, officers, employees, and agents are added as additional insured.

All liability policies are primary of all other valid and collectible coverage maintained by the School Board of Leon County, Florida.

Certificate Holder: The School Board of Leon County, Florida, 2757 W. Pensacola St., Tallahassee, FL 32303

The School Board of Leon County, Florida, reserves the right to review, reject, or accept any required policies of insurance, including limits, coverage, or endorsements, herein throughout the term of this agreement.

- h. Cancellation of Insurance: Vendors are prohibited from providing services under this Agreement with the District without the minimum required insurance coverage and must notify the District within two business days if required insurance is canceled.

4.8 Copyrights, Right to Data, Patents, and Royalties

Where contracted activities produce original writing, sound recordings, pictorial reproductions, drawings, or other graphic representation and works of any similar nature, the District has the right to use, duplicate, and disclose such materials in whole or in part, in any manner, for any purpose whatsoever and to have others acting on behalf of the District to do so.

The District shall have unlimited rights to use, disclose, or duplicate, for any purpose whatsoever, all information and data developed, derived, documented, or furnished by the Proposer. All computer programs and other documentation produced as part of the Contract shall become the exclusive property of the District and may not be copied or removed by any employee of the Contractors without express written permission of the District.

The Contractor, without exception, shall indemnify and save harmless the District, the Board, and its employees from liability of any nature or kind, including costs and expenses for or on account of any copyrighted, patented, or unpatented invention, process, or article manufactured or supplied by the Vendor. The Vendor has no liability when such claim is solely and exclusively due to the combination, operation, or use of any article supplied hereunder with equipment or data not supplied by the Contractor or is based solely and exclusively upon the District's alteration of the article. The District will provide prompt written notification of a claim of copyright or patent infringement and will afford the Contractor the full opportunity to defend the action and control the defense of such claim.

Further, if such a claim is made or is pending, the Contractor may, at its option and expense, procure for the District the right to continue the use of, replace, or modify the article to render it non-infringing. If none of the alternatives are reasonably available, the District agrees to return the article to the Contractor upon its request and receive reimbursement, fees, and costs, if any, as may be determined by a court of competent jurisdiction. If the Contractor uses any design, device, or materials covered by letter, patent or copyright, it is mutually agreed and understood without exception that the Contract prices shall include all royalties or costs arising from the use of such design, device, or materials in any way involved in the work to be performed hereunder.

4.9 Independent Contractor Status

The Successful Proposer shall be considered an independent contractor in the performance of its duties and responsibilities. The District shall neither have nor exercise any control or direction over the methods by which the Contractor shall perform its work and functions other than as provided herein. Nothing is intended to, nor shall be deemed to constitute, a partnership or a joint venture with the Contractor(s).

4.10 Contact with Students

No Contractor staff, subcontractors, suppliers, or anyone involved in any manner with providing goods or services under the Contract(s) shall have direct or indirect contact with students at school sites. A violation of this provision shall result in immediate termination of the offender and issuance of a trespass notice from the Board. The Contractor shall be responsible for ensuring compliance by all employees, independent

contractors, subcontractors, or other persons involved in any manner with providing goods or services under the Contract(s).

4.11 Assignment

The Contractor shall not assign its responsibilities or interests to another party without the prior written approval of the District. The Board shall, at all times, be entitled to assign or transfer its rights, duties, and obligations to another governmental entity of the State of Florida upon giving written notice to the Contractor.

4.12 Force Majeure

Neither party shall be liable for loss or damage suffered as a result of any delay or failure in performance under the Contract or interruption of performance resulting directly or indirectly from acts of God, fire, explosions, earthquakes, floods, water, wind, lightning, civil or military authority, acts of public enemy, war, riots, civil disturbances, insurrections, strikes, or labor disputes.

4.13 Severability

The invalidity or unenforceability of any particular provision shall not affect the other provisions hereof and shall be construed in all respects as if such invalid or unenforceable provision was omitted, so long as the material purposes can still be determined and effectuated.

4.14 Reservation of Rights

The District reserves the exclusive right to make certain determinations regarding the service requirements. The absence of the District setting forth a specific reservation of rights does not mean that any provision regarding the services to be performed is subject to mutual agreement. The District reserves the right to make any and all determinations exclusively which it deems are necessary to protect the best interests of the District and the health, safety, and welfare of the District's employees and of the general public which is served by the Board, either directly or indirectly, through these services.

4.15 Americans with Disabilities Act

The Proposer shall comply with the Americans with Disabilities Act (ADA). In the event of the Proposer's noncompliance with the non-discrimination clauses, the ADA, or with any other such rules, regulations, or orders, the Contract may be canceled, terminated, or suspended in whole or in part, and the Proposer may be declared ineligible for further contracts.

4.16 Employment of District Personnel

The Contractor shall not knowingly engage, employ, or utilize, on a full-time, part-time, or any other basis during the term of the Contract, any current or former employee of the District where such employment conflicts with Section 112.3185, F.S.

4.17 Legal Requirements

The applicable provisions of all federal, state, county, and local laws and all ordinances, rules, and regulations shall govern development, submittal, and evaluation of all Proposals received in response to this RFP and shall govern any and all claims and disputes which may arise between a person(s) submitting a Proposal hereto and the Leon County School Board, by and through its officers, employees and authorized

representatives, or any other person, natural or otherwise; and lack of knowledge by any Contractor shall not constitute a cognizable defense against the legal effect thereof.

4.18 Conflict of Law and Controlling Provisions

The Contract, plus any conflict of law issue, shall be governed by the laws of the State of Florida. The venue for any legal proceedings will be Leon County, Florida.

4.19 Default

If the awarded Proposer should breach the Contract(s) awarded, the Board reserves the right to seek all remedies in law and/or in equity.

4.20 Termination

a. Termination at Will

The Contract may be terminated by the District upon no less than 60 calendar days' notice and by the Contractor upon no less than 180 calendar days' notice, without cause, unless a lesser time is mutually agreed upon by both parties. Notice shall be delivered by certified mail (return receipt requested), by another method of delivery whereby an original signature is obtained, or in-person with proof of delivery.

b. Termination for Cause

Performance issues will be handled per Section 2.12 of the RFP. In the event the Contractor's performance issues are not remedied or are so egregious as to cause damage to life, safety, or property, the District may terminate the Contract upon 24 hours' written notice to the Contractor. Notice shall be delivered by certified mail (return receipt requested), in-person with proof of delivery, or by another method of delivery whereby an original signature is obtained.

c. Termination for Unauthorized Employment

Violation of the provisions of Section 274A of the Immigration and Nationality Act shall be grounds for unilateral cancellation of the Contract.

d. Termination for Lack of Funds

In the event the funds to finance this Contract become unavailable, the District may terminate the Contract upon no less than 24 hours' notice, in writing, to the Contractor. Notice shall be delivered by certified mail (return receipt requested), in-person with proof of delivery, or by another method of delivery whereby an original signature is obtained. The District shall be the final authority as to the availability of funds.

e. Contract Termination Requirements

If at any time, the Contract is canceled, terminated, or otherwise expires, and a Contract is subsequently executed with a contractor other than the Contractor or service delivery is provided by the District, the Contractor has the affirmative obligation to assist in the smooth transition of Contract services to the subsequent provider. This includes but is not limited to, the timely provision of all Contract-related documents, information, and reports not otherwise protected from disclosure by law to the replacing party.

4.21 Public Records

To the extent that information is utilized in the performance of the Contract(s) or generated as a result of it, and to the extent that information meets the definition of “public record,” as defined in Section 119.011(12), F.S., said information is recognized by the parties to be a public record and, absent a provision of law or administrative rule or regulation requiring otherwise, shall be made available for inspection and copying by any person upon request as provided in Chapter 119, F.S. The Contractor agrees to (a) keep and maintain public records required to perform the service; (b) upon request from the District’s custodian of public records, provide the District with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, F.S., or as otherwise provided by law; (c) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Contract term and following completion of the Contract if the Contractor does not transfer the records to the District; and (d) upon completion of the Contract, transfer, at no cost, to the District all public records in possession of the Contractor or keep and maintain public records required by the District to perform the service. If the Contractor transfers all public records to the District upon completion of the contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Contract, the Contractor shall meet all applicable requirements for retaining public records.

All records stored electronically must be provided to the District, upon request from the District’s custodian of public records or Contract Manager, in a format that is compatible with the information technology systems of the District. Unless a greater retention period is required by state or federal law, all documents pertaining to the program contemplated by this RFP shall be retained by the Proposer for five (5) years after the termination of the resulting contract or longer as may be required by any renewal or extension of the Contract. The District may unilaterally cancel the Contract for refusal by the Proposer to allow public access to all documents, papers, letters, or other material made or received by the Proposer in conjunction with the Contract unless the records are exempt from Section 24(a) of Art. I of the State Constitution and either Sections 119.07(1) or 119.071, F.S.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO CONTRACTOR’S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS, JULIE JERNIGAN, AT jerniganj@leonschools.net, (850)487-7363, 520 S. Appleyard Dr., Tallahassee, FL 32304.

4.22 Indemnification

The Contractor shall be liable and agrees to be liable for, and shall indemnify, defend, and hold the District, Board, its employees, agents, officers, heirs, and assignees harmless from any and all claims, suits, judgments, or damages including court costs and attorney's fees arising out of intentional acts, negligence, or omissions by the Contractor, or its employees or agents, in the course of the operations of the Contract, including any claims or actions brought under Title 42 USC §1983, the Civil Rights Act.

4.23 Disputes

Any dispute concerning the performance of the terms of the Contract shall be resolved informally by the Contract Manager. Any dispute that cannot be resolved informally shall be reduced to writing and delivered to the District's Assistant Superintendent of Business Services or designee. The District's Assistant Superintendent of Business Services, or designee, shall decide the dispute, reduce the decision to writing, and deliver a copy to the parties, the Contract Managers, and the District's Contract Administrator.

4.24 Federal Terms and Conditions

For any solicitation that involves, receives, or utilizes Federal funding, the following terms and conditions shall be considered a part of the solicitation and resulting Contract, and the Vendor accepts and acknowledges that it is and will continue to be in compliance with said terms and conditions for the term of the awarded Contract:

- a. Equal Employment Opportunity (2 CFR Part 200.326(C)): All vendors, contractors, and subcontractors must comply with Executive Order 11252, entitled "Equal Employment Opportunity," as amended by Executive Order 11375, implementing regulations at 41 CFR Part 60. This applies to all construction contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3.
- b. Copeland "Anti-Kickback" Act (2 CFR Part 200.326(D)): All vendors, contractors, and subcontractors must comply with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145) as Bacon Act (2 CFR Part 200.326(D)): All vendors, contractors, and subcontractors must comply with supplemented in Department of Labor regulations (29 CFR part 3). Applies to all contracts and subgrants for construction or repair.
- c. Davis- the Davis-Bacon Act (40 U.S.C. 3141-3144 and 3146-3148) as supplemented by Department of Labor regulations (29 CFR part 5). This applies to all prime construction contracts in excess of \$2,000 awarded by the District and sub-grantees when required by Federal grant program legislation.
- d. Contract Work Hours & Safety Standards Act (2 CFR Part 200.326(E)): All vendors, contractors, and subcontractors must comply with 40 U.S.C. 3702 and 3704 of the Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708) as supplemented by Department of Labor regulations (29 CFR part 5). This applies to all applicable contracts awarded by the District and sub-grantees in excess of \$100,000 that involve the employment of mechanics or laborers.
- e. Access to Records (2 CFR Part 200.336): All vendors, contractors, and subcontractors shall give access to the School Board of Leon County, the appropriate Federal agency, the Inspectors General, the Comptroller General of the United States, or any of their duly authorized representatives to any books, documents, papers, and records of the vendor which is directly pertinent to this specific solicitation for the purpose of making audit, examination, excerpts, and transcripts.

- f. Rights to Inventions Made Under a Contract or Agreement (2 CFR Part 200.326 (F)): The recipient or subrecipient must comply with the requirements of 37 CFR Part 401 and any implementing regulations issued by the awarding agency. This applies to Federal awards meeting the definition of “funding agreement” under 37 CFR §401.2(a), and the recipient or subrecipient wishes to enter into a contract with a small business Contractor or non-profit organization.
- g. Clean Air Act (2 CFR 200.326(G)): All vendors, contractors, and subcontractors must comply with all applicable standards, orders, or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Applies to contracts, subcontracts, and subgrants for amounts in excess of \$150,000.
- h. Energy Efficiency (2 CFR 200.326(H)): All vendors, contractors, and subcontractors must comply with mandatory standards and policies relating to energy efficiency, which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6201).
- i. Federal Debarment Certification (2 CFR Part 200.326(I)): Certification regarding debarment, suspension, ineligibility, and voluntary exclusion as required by Executive Orders 12549 and 12689, Debarment and Suspension; and in accordance with 2 CFR Part 180, Section 300.
 - 1. The prospective lower tier participant certifies, by submission and signature of this Proposal, that neither it nor its principals, its agents, or its representatives are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
 - 2. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this Proposal.
- j. Anti-Lobbying Certification (2 CFR Part 220.326(J)): Certification regarding the use of Federal funds as required by Byrd Anti-Lobbying Amendment 31 U.S.C. 1352. This provision applies to vary at or above \$100,000.
 - 1. The Contractor certifies, by submission and signature of their Proposal, that during the term and after the awarded term of all contracts resulting from this procurement, it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment 31 U.S.C. 1352, including that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352.
 - 2. Where funds other than Federal appropriated funds are used for such purpose in connection with obtaining any Federal award, the Contractor must disclose the same.
- k. Procurement of recovered materials (2 CFR §200.322): The non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. This applies to items where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeds \$10,000.

- I. Records Retention: (2 CFR §200.333): Financial records, supporting documents, statistical records, and all other non-Federal entity records pertinent to a Federal award must be retained for a period of three years from the date of submission of the quarterly or annual financial report, respectively, as reported to the Federal awarding agency or pass-through entity in the case of a subrecipient.

4.25 Anti-Discrimination

No person shall, on the basis of sex (including transgender, gender nonconforming, and gender identity), marital status, sexual orientation, race, religion, ethnicity, national origin, age, color, pregnancy, disability, military status, or genetic information be excluded from participation in, be denied the proceeds or benefits of, or be otherwise subjected to, discrimination in the performance of this Contract.

4.26 Discriminatory Vendor List

Per the provisions of 287.134(2)(a), F.S., “An entity or affiliate who has been placed on the discriminatory vendor list may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity.” The Vendor certifies, by submission and signature of their Proposal, that neither the Proposer nor its principal Vendor, agent or representative is presently on the discriminatory vendor list or otherwise precluded by Section 287.134, F.S. from participating in this Contract.

4.27 Public Entity Crime & Convicted Vendor List

Per the provisions of 287.133 (2)(a), F.S. “a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal or reply on a contract to provide any goods or services to a public entity, may not submit a bid, proposal or reply on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids, proposals or replies on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, F.S. for Category Two for a period of 36 months from the date of being placed on the convicted vendor list. The Vendor certifies, by submission and signature of their Proposal, that neither the Proposer nor its principal, agent, or representative is presently debarred, suspended, proposed for debarment, declared ineligible, voluntarily excluded from participation in this transaction, or otherwise precluded by Section 287.133, F.S. from participating in this Contract.

4.28 Scrutinized Companies Certification

The Proposer certifies they are not listed on the Scrutinized Companies that Boycott Israel List, created under Section 215.4725, F.S., and they are not currently engaged in a boycott of Israel. If the Contract exceeds \$1,000,000 in total (not including renewal years), the Proposer certifies that it is not listed on either the Scrutinized Companies with Activities in Sudan List, or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List created under Sections 215.473 and 215.4725, F.S., and further certifies they are not engaged in business operations in Cuba or Syria as stated in Section 287.135(2)(b)2, F.S. Per Sections 287.135(5) and 287.135(3), F.S., the Proposer agrees the Board may immediately terminate the Contract for cause if the Proposer is found to have submitted a false certification or if the Proposer is placed

on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or has engaged in business operations in Cuba or Syria during the term of the Contract. Any company that submits a Proposal for a contract or upon execution or renewal of a contract with an agency or local governmental entity for goods or services of any amount must certify that the company is not participating in a boycott of Israel.

4.29 Vendor Interests

Per Section 287.05701, F.S., the Board will not consider a Vendor's social, political, or ideological interests when determining if a vendor is considered responsible. Nor will the Board provide a preference based on a vendor's social, political, or ideological beliefs. The Board will not request nor shall a Respondent be expected to provide documentation of its social, political, or ideological interests or those of its employees.

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SECTION 5: Definitions

In this RFP, the following words and expressions have the definitions below unless the context otherwise clearly leads to a different interpretation.

| | |
|---------------------------------------|--|
| Adjacent County | Any private independent vendor whose county abuts Leon County and has been licensed at least six (6) months preceding the bid or proposal opening, as required by local, State, and Federal law, to provide the goods and services to be purchased. |
| Business Day | Any weekday in Florida, excluding Saturdays, Sundays, and District-observed holidays. |
| Contract | The written agreement entered by the Board and Contractor(s) resulting from the award of this solicitation for the delivery of the goods or services described herein. |
| Contract Manager | The District representative, or their designee, whose responsible for oversight of the resulting Contract, including performance monitoring and certification of invoices for payment. |
| District/Board (LCSB) | Leon County School District, with the Leon County School Board serving as the Governing Board and contracting entity |
| Mandatory Responsiveness Requirements | Terms, conditions, and requirements that must be met by the Proposer to be considered responsive to this solicitation. |
| Material Deviation(s) | A deviation which, in the District's sole discretion, is not in substantial accordance with the requirements herein, provides a significant competitive advantage to one Proposer over other Proposers, has a potentially substantial effect on the quantity or quality of items proposed, services proposed, or cost to the District. |
| Minor Irregularity | A variation from the requirements herein that does not give the Proposer a substantial competitive advantage or benefit not enjoyed by other Proposers and does not adversely impact the interests of the District. |
| Proposer | A legally qualified corporation, partnership, or other business entity that submits a Proposal to the District in response to this RFP. This term differs from suppliers, which refers to the marketplace at large. |
| Responsible Proposer | A Proposer who can fully perform all aspects of the Contract Requirements and has the integrity and reliability to ensure good faith performance. |
| Responsive Proposal | A Proposal, submitted by a Responsible Proposer which conforms to all material aspects of this RFP. |
| Subcontract | An agreement between the Contractor and any other person or organization in which that person or organization agrees to perform any duties on the Contractor's behalf under the Contract. The Successful Proposer is not relieved of its duties under the Contract when it enters a Subcontract. |
| Successful Proposer(s) or Contractor | The Proposer(s) who is awarded the Contract(s) to deliver the goods or provide the services sought in this RFP. |
| Prequalification of Contractors | The School Board will prequalify Contractors for a one-year period pursuant to the criteria set forth in Florida Statutes 1013.46, and State Requirements for Educational Facilities, Chapter 4, Section 4.1 (1). |

Attachment I
Cost Proposal Form

RFP 256-2025 HVAC Installation, Maintenance, and Repair Services

| Description | Straight Time Weekdays 7:00 a.m. – 5:00 p.m. | Overtime Weekdays 5:00 p.m. – 7:00 a.m., Weekends and Holidays |
|---|--|---|
| 11. Journeyman HVAC Mechanic | \$ _____ per hr. | \$ _____ per hr. |
| 12. HVAC Apprentice/ Helper | \$ _____ per hr. | \$ _____ per hr. |
| 13. Laborer | \$ _____ per hr. | \$ _____ per hr. |
| Markup Percentage: | | |
| 14. Materials % Markup: The District will not accept markup percentages in excess of 10% of the invoiced cost. | | _____ % |

Company Name

FEIN

Authorized Representative Name (Printed)

Authorized Representative Title

Authorized Representative Signature

Date

Attachment II

Required Provisions Certifications

1. Business/Corporate Experience

This is to certify that the Proposer is:

- Duly licensed to conduct business in the State of Florida;
- Has a minimum of three (3) years in the last five (5) as a heating and air conditioning system Contractor, doing installation, maintenance, and repairs for commercial or governmental customers of the same nature as those sought by the District;

2. Prime Vendor

This is to certify that the Successful Proposer will act as the Prime Contractor to the District for all services provided under the Contract(s).

3. Meets Legal Requirements

This is to certify that the Proposer's Proposal and all services provided under the Contract will be compliant with all laws, rules, and other authority applicable to providing the services, including, but not limited to, Florida's Open Government laws (Article I, Section 24, Florida Constitution, Chapter 119, F.S.).

4. Financial Disclosure

This is to certify that the Proposer has disclosed in their Proposal all suspensions, revocations, bankruptcies, judgments, or liens in the last five (5) years.

5. Federal Debarment

This is to certify that neither the Proposer nor its principles are currently disbarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from participation in this solicitation by any Federal department or agency.

6. Conflict of Interest

Per Section 1001.42(12)(i), F.S., this certifies that no member of the Leon County School Board or the Superintendent has any financial interest in the Proposer whatsoever.

7. Statement of No Inducement

This is to certify that no attempt has been made or will be made by the Proposer to induce any other person or Contractor to submit or not to submit a Proposal with regards to this RFP. Furthermore, this is to certify that the Proposal contained herein is submitted in good faith and not subject to any agreement or discussion with, or inducement from, any Contractor or person to submit a complementary or other non-competitive Proposal.

8. Statement of Non-Disclosure

This is to certify that none of the contents of this Proposal have been disclosed before award, directly or indirectly, to any other Proposer or competitor.

9. Statement of Non-Collusion

This is to certify that the proposed costs in this Proposal have been arrived at independently, without consultation, communications, or agreement as to any matter relating to such costs with any other Proposer or with any competitor, and not to restrict competition.

10. Scrutinized Companies Certification

The Proposer certifies they are not listed on the Scrutinized Companies that Boycott Israel List, created under Section 215.4725, F.S., and they are not currently engaged in a boycott of Israel. If the resulting Contract exceeds \$1,000,000.00 in total, not including renewal years, the Proposer certifies that they are not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List created under Sections 215.473, F.S., and 215.4725, F.S., and further certifies they are not engaged in business operations in Cuba or Syria. In compliance with Sections 287.135(5), F.S., and 287.135(3), F.S., the Proposer agrees the District may immediately terminate the resulting Contract for cause if the Proposer is found to have submitted a false certification or if the Proposer is placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or has engaged in business operations in Cuba or Syria during the term of the Contract. Any company that submits a bid or proposal for a contract, or intends to enter into or renew a contract with an agency or local governmental entity for commodities or services, of any amount, must certify that the company is not participating in a boycott of Israel.

By signing this certification below, the Authorized Representative affirms they have the authority to bind the Proposer and acknowledges and affirms the statements above.

STATE OF FLORIDA _____

COUNTY OF _____

Authorized Representative (Print)

Authorized Representative (Signature)

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization this _____ day of _____, 20____, by _____ (name of authorized representative) as _____ (position title) for _____ (Vendor Name).

(NOTARY SEAL)

Notary Signature

Name of Notary (Typed, Printed, or Stamped)

Personally Known ____ OR Produced Identification ____ Type of Identification _____

Attachment III
Notice of Conflict of Interest

Company Name: _____
[Proposers shall complete either Section 1 or Section 2]

Solicitation Number: RFP 254-2024

To participate in this solicitation process and comply with the provisions of Chapter 112.313, Florida Statutes, the undersigned corporate officer hereby discloses the following information to the Leon County School Board.

Section I

I hereby certify that no official or employee of the School Board requiring the goods or services described in these specifications has a material financial interest in this company.

| | |
|---------------------------------------|-----------------------------------|
| _____ | _____ |
| Authorized Representative (Signature) | Authorized Representative (Print) |

Section 2

I hereby certify that the following named Leon County School Board official(s) and employee(s) have a material financial interest(s) (over 5%) in this company, and they have filed Conflict of Interest Statements with the Leon County Supervisor of Elections, before the Proposal Opening.

| Name | Title/Position | Date of Filing |
|-------|----------------|----------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

| | |
|---------------------------------------|-----------------------------------|
| _____ | _____ |
| Authorized Representative (Signature) | Authorized Representative (Print) |

Date

Attachment IV **Proposer Contact Information**

The Proposer shall identify the contact information for solicitation and contractual purposes via the requested fields in the table below.

| | For solicitation purposes, the Proposer's representative shall be: | For contractual purposes, should the Proposer be awarded, the Proposer's representative shall be: |
|-----------------------------------|---|---|
| Name: | | |
| Title: | | |
| Street Address: | | |
| City, State, Zip Code: | | |
| Telephone:(Office) | | |
| Telephone:(Cell) | | |
| Email: | | |

| | | |
|---------------------|--|-------------|
| | | |
| Company Name | Authorized Representative (Signature) | Date |
| | | |
| FEIN # | Authorized Representative (Printed) | |

Attachment V

Proposer's Reference Form

In the spaces provided below, the Proposer shall list all names under which it has operated during the past five (5) years.

On the following pages, the Proposer shall provide the information indicated for three (3) separate and verifiable references. The references listed must be for businesses or government entities for whom the Proposer has provided services of similar scope and size to the services identified in the RFP. The same reference may not be listed for more than one (1) organization and confidential references shall not be included. In the event that the Proposer has had a name change since the time work was performed for a listed reference, the name under which the Proposer operated at that time must be provided in the space provided for the Proposer's Name.

Current or former employees of the District or current or former members of the Board may not be used for more than one reference.

References that are listed as subcontractors in the response will not be accepted as references under this solicitation. Additionally, References shall pertain to current and ongoing services or those that were completed before January 1, 2021. References shall not be given by:

- Persons currently or formerly employed or supervised by the Proposer or its affiliates.
- Board members within the Proposer's organization.
- Relatives of any of the above.

References must be signed and notarized to be accepted.

Additionally, the District reserves the right to contact references other than those identified by the Proposer to obtain additional information regarding past performance.

Bidder's Reference Form

Reference #1

Bidder Name _____

Reference Company Name: _____

Address: _____

Contact Person _____

Contact Title _____

Contact Phone _____

Contact Email _____

Performance Period _____

Brief description of the services performed for this reference

Overall contract performance ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☐ Excellent

Would you contract with this vendor again? ☐ Yes ☐ No

Bidder's Reference Form

Reference #2

Bidder Name _____

Reference Company Name: _____

Address: _____

Contact Person _____

Contact Title _____

Contact Phone _____

Contact Email _____

Performance Period _____

Brief description of the services performed for this reference

Overall contract performance ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☐ Excellent

Would you contract with this vendor again? ☐ Yes ☐ No

Primary Reference Contact Signature

Date

Bidder's Reference Form

Reference #3

Bidder Name _____

Reference Company Name: _____

Address: _____

Contact Person _____

Contact Title _____

Contact Phone _____

Contact Email _____

Performance Period _____

Brief description of the services performed for this reference

Overall contract performance ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☐ Excellent

Would you contract with this vendor again? ☐ Yes ☐ No

Primary Reference Contact Signature

Date

Attachment VI

Local Preference Affidavit

To qualify for the Local Vendor Preference, a Proposer must have a physical location in Leon County (or an Adjacent County), employ at least one (1) person at that location, and have been licensed, as required, for at least six (6) months before the Proposal Opening. The Proposer should have 200 employees or less and less than \$5,000,000 in adjusted gross income. The Proposer, on a day-to-day basis, should provide the goods/services provided under this Contract substantially from the local business address. Post Office boxes are not acceptable for purposes of obtaining this preference.

By completing this Affidavit, the Proposer affirms that it is a local or Adjacent County Business, as defined by Board Policy 6450.

Please complete the following in support of the self-certification:

Proposer Name: _____

Physical Address: _____

County: _____

Phone of Local Location: _____

Length of Time at this Location: _____ **# of Employees at this Location:** _____

Is your business certified as a Small Business Enterprise (SBE) through Leon County Schools? _____

STATE OF FLORIDA

COUNTY OF _____

Authorized Representative (Print)

Authorized Representative (Signature)

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online notarization this _____ day of _____, 20____, by _____ (name of authorized representative) as _____ (position title) for _____ (company name).

(NOTARY SEAL)

Notary Signature

Name of Notary (Typed, Printed, or Stamped)

Personally Known ☐ **OR** Produced Identification ☐ Type of Identification _____

Attachment VII
Subcontracting Form

The Proposer shall complete the information below on all subcontractors that will be providing services to the Proposer to meet the requirements of the Contract, should the Proposer be awarded. Submission of this form does not indicate the District's approval of such subcontractor(s), but provides the District with information on proposed subcontractors for review.

Complete a separate sheet for each subcontractor.

Prime Proposer Name: _____

Type/Description of Goods or Service Subcontractor will provide:

Subcontractor Company Name: _____ FEIN: _____

Contact Person: _____ Contact Phone Number: _____

Address: _____

Email address: _____

Currently Registered as a Small Business Enterprise (SBE) with Leon County Schools? Yes _____ No _____

Local Proposer per PO6450? Yes _____ No _____

In a job description format, identify the responsibilities and duties of the subcontractor based on the specifications or scope of services outlined in this solicitation.

Attachment VIII
Drug-Free Workplace Certification

The undersigned Proposer, in accordance with Section 287.087, F.S., hereby certifies that.

Company Name

1. Publishes a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Informs employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counselling, rehabilitation, employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Gives each employee engaged in providing the commodities or contractual services sought in this solicitation a copy of the statement specified in Paragraph 1.
4. In the statement specified in Paragraph 1, notify the employees that, as a condition of working on the commodities or contractual services sought in this solicitation, the employee will abide by the terms of the statement and will notify the employer of any conviction of, a plea of guilty, or nolo contendere to, any violation of Chapter 893, F.S., or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Imposes sanctions on or requires satisfactory participation in a drug abuse assistance or rehabilitation program by any employee who is so convicted as available in their community.
6. Make a good faith effort to continue to maintain a drug-free workplace through the implementation of Paragraphs 1 through 5.

As the person authorized to sign this statement, I certify that this company complies fully with the above requirements.

Authorized Officer (Printed Name) _____

Authorized Officer (Signature) _____

Date _____

Attachment IX
Certification Regarding Debarment, Suspension,
Ineligibility and Voluntary Exclusion AD-1048
Lower Tier Covered Transactions

The following statement is made in accordance with the Privacy Act of 1974 (5 U.S.C. § 552a, as amended). This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, and 2 C.F.R. §§ 180.300, 180.335, Participants' responsibilities. The regulations were amended and published on August 31, 2005, in 70 Fed. Reg. 51865-51880. Copies of the regulations may be obtained by contacting the Department of Agriculture agency offering the proposed covered transaction.

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0505-0027. The time required to complete this information collection is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The provisions of appropriate criminal, civil, fraud, privacy, and other statutes may be applicable to the information provided.

(Read instructions on page two before completing certification.)

- a.** The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency;
- b.** Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

| | |
|--|---------------------------------|
| ORGANIZATION NAME | PR/AWARD NUMBER OR PROJECT NAME |
| NAME(S) AND TITLE(S) OF AUTHORIZED REPRESENTATIVE(S) | |
| SIGNATURE(S) | DATE |

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint \(https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer\)](https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442.

Instructions for Certification

1. By signing and submitting this form, the prospective lower-tier participant is providing the certification set out on page 1 in accordance with these instructions.
2. The certification in this clause is a material representation of the fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower-tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension or debarment.
3. The prospective lower tier participant shall provide immediate written notice to the person(s) to whom this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549, at 2 C.F.R. Parts 180 and 417. You may contact the department or agency to which this proposal is being submitted for assistance in obtaining a copy of those regulations.
5. The prospective lower-tier participant agrees by submitting this form that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower-tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.
6. The prospective lower tier participant further agrees by submitting this form that it will include this clause titled "Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion - Lower Tier Covered Transactions," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower-tier covered transaction that is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the System for Award Management (SAM) database.
8. Nothing contained in the foregoing shall be construed to require the establishment of a system of records to render in good faith the certification required by this clause. The knowledge and information of a participant are not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized under paragraph (5) of these instructions, if a participant in a covered transaction knowingly enters into a lower-tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

Attachment X
CERTIFICATION REGARDING LOBBYING
CERTIFICATION FOR CONTRACTS, GRANTS, AND COOPERATIVE AGREEMENTS

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of Congress or an employee of a member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal-appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including sub-contracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of the fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

By: _____ Date: _____
(Signature of Official (Executive Director) Authorized to Sign Application)

By: _____ Date: _____
(Signature of Official (Chief Financial Officer) Authorized to Sign Application)

For: _____
Name of Grantee

Title of Grant Program

Disclosure of Lobbying Activities

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

3.3.3 Type of Federal Action**3.3.4 Status of Federal Action****3.3.5 Report Type**

i. Contract

Bid/offer/application

1. Initial filing

ii. Grant

a. Initial award

a. Material changes

b. Cooperative Agreements

a. Post-award

b. Loan

For a material change only:

c. Loan Agreement

Year: _____ Quarter: _____

d. Loan Insurance

Date of last report: _____

3.3.6 Name and Address of Reporting Entity**3.3.7 If Reporting Entity in No. 4 is a Subawardee, Enter Name, and Address of the Prime**

Prime _____ Subawardee _____ Tier (if known) _____

Name: _____

Name: _____

Street: _____

Street: _____

City/State/ Zip _____

City/State/ Zip _____

Congressional District (if known) _____

Congressional District (if known) _____

3.3.8 Federal Department/Agency:**3.3.9 Federal Program Name/Description:**

CFDA Number, if applicable _____

3.3.10 Federal Action Number (if known) _____**3.3.11 Award Amount (if known)** _____**3.3.12 (a.) Name and Address of Lobbying Registrant****10. (b.) Individuals Performing Services**

3.3.13 Information requested through this form is authorized by Title 31 U.S.C. Section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Signature: _____

Print Name: _____ Title: _____

Telephone No: _____ Date: _____

INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action or a material change to a previous filing, pursuant to Title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a follow-up report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, State and zip code of the reporting entity. Include the Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or sub-award recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants, and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include the Congressional District, if known.
6. Enter the name of the federal agency making the award or loan commitment. Include at least one organizational level below the agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitations to Bid (ITB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Include prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in items 4 or 5.
10.
 - a. Enter the full name, address, city, State, and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.
 - b. Enter the full names of the individual(s) performing services, and include full address if different from 10(a). Enter Last Name, First Name, and Middle Initial (MI).
11. The certifying official shall sign and date the form and print his/her name, title, and telephone number.



LET'S GO BEYOND™

Trane U.S. Inc.
109-1 Hamilton Park Drive
Tallahassee, FL 32304



HVAC Installation, Maintenance, and Repair Services - RFP 256-2025

**Mike Cunniff
Account Manager**

**851-574-1726 (office)
850-294-3112 (cell)**
Mike.Cunniff@Trane.com

**Trane U.S. Inc.
109-1 Hamilton Park Drive
Tallahassee, FL 32304**

The Proposer agrees to provide the Services as described in their Proposal and the RFP.

A handwritten signature in black ink, appearing to read 'Joe Follenweider'.

Joe Follenweider, General Sales Manager, North Florida

4/9/2024

Date

Tab A



**Trane Commercial Systems
Central and North Florida**
109-1 Hamilton Park Drive
Tallahassee, FL 32304
Tel 850-574-1726
Cell 850-294-3112
Fax 850-575-5880

April 8, 2024

Leon County Schools
Purchasing Department
RFP 256-2025 HVAC Services
Attn: Nancy Scott, Procurement Officer
3397 W. Tharpe Street
Tallahassee, FL 32303

Cover Letter

Dear Ms. Scott,

Trane has reviewed and agrees to provide services as described in our proposal and as described in *RFP 256-2025: "HVAC Installation, Maintenance, and Repair Services"*. As the Area Manager, I will be your point of contact for contracting purposes. Please feel free to contact me at any time should you have any questions or comments regarding this RFP.

Mike Cunniff is your Service Account Manager and is available for any quotations by cell phone: 850-294-3112.

Alan Fridley is the Area Service Manager and leads our local technicians, training & response, feel free to contact him whenever required at 904-334-5214.

Steve Wolf is the Tallahassee Resource Coordinator and coordinates scheduling for our technicians and his contact number is 850-480-9074.

We are available to respond to your emergency needs within the specified 2-hours. Feel free to call our after-hours and holiday service response line at 850-574-1726 Ext 3 (for commercial service).

We are grateful for the great relationship we have maintained with you District staff and administration over two decades. Feel free to call on me at any time if I can be of service.

Sincerely,

A handwritten signature in black ink, appearing to read 'Joe Follenweider', written over a horizontal line.

Joe Follenweider
Area Sales Manager
Trane US, Inc.
(850) 596-4142 Office
(850) 476-5010 Cell
Joe.Follenweider@trane.com

Executive Summary

Trane Technologies, Inc. acknowledges that our role as service providers is to support the goals of providing a standard, traditional curriculum to the Leon County School District's approximate 31,000 students enrolled in district schools from pre-K through to 12th grade as well as the Adult Education initiatives provide at several facilities across the county at both regular and non-school hours.

We also acknowledge that Trane is a Licensed Mechanical Contractor registered in the State of Florida equipped to furnish all materials, services, supervision, technicians, materials, equipment, tools, and any incidentals necessary to provide the installation, maintenance and miscellaneous heating and air conditioning service repairs as needed district wide starting on or before July 1, 2024



We also warrant that Trane may be required to repair, alter, remodel, add to, subtract from or improve any previously installed HVAC equipment or facility and that all work shall be permanent, and all preventative maintenance, repairs and installation of HVAC equipment and performance of heating and air conditioning shall follow all applicable Florida Building Codes and OSHA regulations.

Trane pledges to maintain the depth and talent required of our staffing to respond to the district's request to simultaneously perform work at multiple locations and will maintain at a minimum at least two (2) full time technicians that are properly trained and certified in refrigerant handling, recovery and storage.

Additionally, our policy is to ensure equal opportunity in all aspects of employment regardless of race, color, religion, sex, national origin, ancestry, citizenship, age, marital status, disability, veteran status, sexual orientation, gender identity, or any other basis protected by law.

- We strive to employ and promote the best-qualified person for each position while valuing and promoting diversity within our workforce.
- We comply with all federal and state laws regulating employment decisions. These include, but are not limited to advertising, recruiting, hiring, placement, promotion, transfer, demotion, compensation, training, layoff or termination, participation in social and recreational functions, and use of employee facilities.



- Globally we prohibit harassment of employees based on race, color, religion, sex, national origin, ancestry, citizenship, age, marital status, disability, veteran status, sexual orientation, gender identity, or any other basis protected by law.

Trane endeavors to meet all requirements to perform project specific duties as outlined in the above-mentioned RFP that individual projects will be deemed complete when the work has been reviewed and approved.



Financial Interest

Trane warrants that there are no LCS employees or officials that have any conflict of material or financial interest involved in this response.

Not Applicable

Section 2

I hereby certify that the following named Leon County School Board official(s) and employee(s) have a material financial interest(s) (over 5%) in this company, and they have filed Conflict of Interest Statements with the Leon County Supervisor of Elections, before the Proposal Opening.

| Name | Title/Position | Date of Filing |
|------|----------------|----------------|
| | | |
| | | |
| | | |
| | | |



Joe Follenweider

Authorized Representative (Signature)

Authorized Representative (Print)

4/9/2024

Date



Tab B

References

Florida State University

- Shortlisted for Service Providers for Chillers, Cooling Towers, Air Compressors & HVAC with various equipment & building assignments. 5 + Years.

Tallahassee Community College

- Service Agreements on existing Chillers & HVAC 10 + years.

Florida A & M University

- Service providers for all chillers & various 10 + years.

Florida High School (FSU Charter School)

- Service provider for Chillers & Trane DDC Controls 20 + years.



Attachment V Proposer's Reference Form

In the spaces provided below, the Proposer shall list all names under which it has operated during the past five (5) years.

Trane U.S. Inc.

On the following pages, the Proposer shall provide the information indicated for three (3) separate and verifiable references. The references listed must be for businesses or government entities for whom the Proposer has provided services of similar scope and size to the services identified in the RFP. The same reference may not be listed for more than one (1) organization and confidential references shall not be included. In the event that the Proposer has had a name change since the time work was performed for a listed reference, the name under which the Proposer operated at that time must be provided in the space provided for the Proposer's Name.

Current or former employees of the District or current or former members of the Board may not be used for more than one reference.

References that are listed as subcontractors in the response will not be accepted as references under this solicitation. Additionally, References shall pertain to current and ongoing services or those that were completed before January 1, 2021. References shall not be given by:

- Persons currently or formerly employed or supervised by the Proposer or its affiliates.
- Board members within the Proposer's organization.
- Relatives of any of the above.

References must be signed and notarized to be accepted.

Additionally, the District reserves the right to contact references other than those identified by the Proposer to obtain additional information regarding past performance.

Bidder's Reference Form

Reference #1

Bidder Name Trane

Reference Company Name: Florida A + M University

Address: 2400 Wahnish Way Tallahassee FL 32310

Contact Person William Hutchins

Contact Title Utility Superintendent

Contact Phone 850-524-5753

Contact Email William.Hutchins@FAMU.edu

Performance Period > 20 years

Brief description of the services performed for this reference

Installed numerous chillers Both air and water cooled
 Continuous Maintenance on Installed chillers
 Renewal of 1200 and 2200 Ton chillers
 Warranty Work
 Air Handler Installation and Maintenance
 GEC For Campus Infrastructure upgrade

Overall contract performance ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☒ Excellent

Would you contract with this vendor again? ☒ Yes ☐ No

William I Hutchins

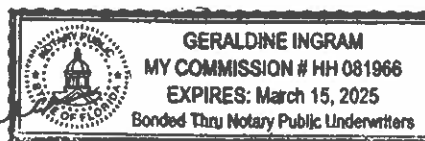
4/3/2024

Primary Reference Contact Signature

Date

4/4/24 - H325-938-67-207-0

Geraldine Ingram



Bidder's Reference Form

Reference #2

Bidder Name TRANE

Reference Company Name: FLORIDA STATE UNIVERSITY SCHOOL

Address: 3000 SCHOOL HOUSE ROAD, TALL, FL. 32311

Contact Person EDWIN O. MAXWELL

Contact Title FACILITIES SPECIALIST/SUPERINTENDENT

Contact Phone 850-728-0158

Contact Email emaxwell@admin.fsu.edu

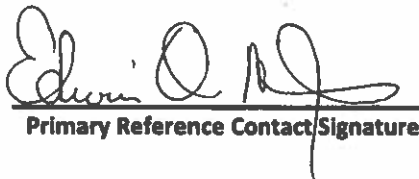
Performance Period 2000 to present

Brief description of the services performed for this reference

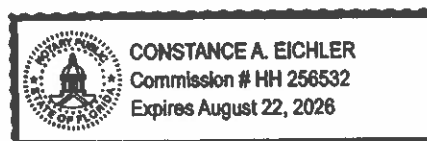
HVAC & CONTROL SALES AND SERVICE. CHILLER SALES & SERVICE. AHU & FCU SERVICE & MAINTENANCE. PROGRAMING UPDATE & SERVICING. REPAIR OF ALL HVAC RELATED SYSTEMS

Overall contract performance ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☒ Excellent

Would you contract with this vendor again? ☒ Yes ☐ No


Primary Reference Contact Signature

4-4-2024
Date



Bidder's Reference Form

Reference #3

Bidder Name

Trane

Reference Company Name:

Florida State University

Address:

969 Learning Way Tallahassee, FL 32306

Contact Person

Jason Horey

Contact Title

Project Manager

Contact Phone

850-597-1208

Contact Email

jhorey@fsu.edu

Performance Period

2022-2024

Brief description of the services performed for this reference

Trane has performed preventive maintenance on our chillers, also have replaced AHU's and chillers when needed. They have been very responsive on calls and service during this time.

Overall contract performance

☐ Poor☐ Fair☐ Adequate☐ Good☒ Excellent

Would you contract with this vendor again?

☒ Yes☐ No

Primary Reference Contact Signature

Date

4/5/24

STATE OF FLORIDA

COUNTY OF Florida Leon

The foregoing instrument was acknowledged before me this 5th day of April, 2024, by
Jason Horey



(Signature of Notary Public-State of Florida)

(Name of Notary Typed, Printed, or Stamped)

Personally Known ☒OR Produced Identification ☐

Bidder's Reference Form

Reference #4

Bidder Name TRANE

Reference Company Name: TALLAHASSEE COMMUNITY COLLEGE

Address: 444 APPEYARD DRIVE

Contact Person DON HERR

Contact Title FACILITIES DIRECTOR

Contact Phone 850-879-2012

Contact Email DON.HERR@TCC.FL.EDU

Performance Period JULY 1 2022 THRU JULY 1 2024

Brief description of the services performed for this reference

REPLACED 3 CHILLERS, REPLACED OUTSIDE AIR UNIT,
REPLACED MULTIPLE SPLIT SYSTEM AIR CONDITIONING
UNITS, 2-SERVICE AGREEMENTS

Overall contract performance ☐ Poor ☐ Fair ☐ Adequate ☐ Good ☒ Excellent

Would you contract with this vendor again?

☒ Yes

☐ No

Don Herr

DON HERR

Primary Reference Contact Signature

FACILITIES DIRECTOR

Date

04/08/2024

Provided FC ID H600-179-54-128-0

[Signature]



TATIANNA KIMBLE
Commission # HH 358691
Expires January 31, 2027

4/8/2024

Narrative Record of Past Experience

Trane hereby warrants, as indicated in Section 1.4(j) of this RFP, that the firm has exceeded the minimum requirement (three years within the last five years) performing as a licensed heating and air conditioning system contractor doing installation, maintenance, and repairs for commercial or governmental customers of the same nature as those sought by Leon County Schools as outlined below:

A. Experience:

Trane's office in Tallahassee, FL is part of the larger Trane US, Inc. founded in 1913 with 35,000+ employees globally today. North Florida Trane (Tallahassee) is a factory owned office with more than 65 employees locally that reports to the Northeast Regional Florida Trane Office in Jacksonville. Our State of Florida Headquarters is located in Miramar, Florida and Trane Technologies, Inc. Headquarters is located in Davidson, NC.

Trane Florida Building Services has been serving Tallahassee and North Florida as well as the majority of Florida Counties, local, state, and federal governments as well as schools, companies, industries, hospitals for over fifty-years, installing and servicing their HVAC systems and facility management through provision of high performance building designs and selection of mechanical systems, as well as the operation, maintenance, and upgrade of procedures throughout the life of the buildings. Trane Building Services provides solutions to environmental control and facility management problems for our customers with a building-wide solutions focus.

To support Leon County School's mission, Trane Building Services commits to continuing to provide knowledgeable, professional project managers, engineers, and technicians to deliver state-of-the-art HVAC solutions and services at a system level, backed by a global organization ready to support local staff with world class resources, 365 days per year.

Our Tallahassee based team has direct access to an expansive network of resources including but not limited to direct factory tech support, local and state-wide project management, and job-specific project development services, along with one of the largest service technician bases in Florida, and 100+ years of manufacturing and construction management experience.

Trane provides a unique offering compared to other companies by being the world's leading HVAC equipment and controls manufacturer. Through our relationship over the past decades with Leon County Schools, Trane's local team has been consistent. Mike Cuniff, Brian Rybak, Alan Fridley and Ed Blair have led the service team, while Joe Follenweider has provided local sales leadership.

This core team possesses the experience needed to provide the services and responses necessary to meet the goals of the county construction and facilities teams.



B. Length of Service:

Trane Florida Building Services has been serving North Florida as well as the majority of Florida Counties, local, state, and federal governments as well as schools, companies, industries, hospitals since 1970 maximizing their HVAC and building systems investments and facility management through high performance building design and the selection of systems, operating conditions, maintenance, and upgrade procedures throughout the life of the building. Trane Building Services provides solutions to environmental control and facility management problems for our customers with a building-wide solutions focus.

D. Disputes:

Trane-Tallahassee has not had any suspension, revocations, or review of our licensure in the past five years, nor have we been party to any bankruptcies, judgements, or liens within the past five years.

Trane as a corporation seeks to settle disputes and conflicts immediately when they appear. Trust and teamwork with all parties involved is our goal on every project and as a result we have an excellent record of avoiding disputes allowing us to not be named in suspensions, revocations, or review of Trane's licensure. For the purpose of this response we assure that we have not had any such occurrences in the North Florida region in the past three years involving public agencies or their affiliates, subcontractors or agents.

E. Subcontractors Information:

Trane fully intends to self-perform the work requested by the District and in the rare case that we would need to enlist additional firms to adequately service the needs of the project, we fully intend on engaging subcontractors currently prequalified by the District or submit the required data to confirm acceptance by the District. Some of the subcontractors we have engaged in the recent past and may be included in this proposed scope of work include:

1. Bonds Electric
2. Jackson-Cook Cranes





ANNUAL PREQUALIFICATION CERTIFICATE

Issued by: Department of Facilities & Construction
Leon County Schools
3420 West Tharpe Street, Suite 100
Tallahassee, Florida 32303
Email: batesd@leonschools.net

Date of Board Approval: March 26, 2024 Item #: 18.08
Applicant Business Name: Trane U.S. Inc.
Mailing Address: 109-1 Hamilton Oak Drive
City, State, Zip Code: Tallahassee, Florida 32304
Trade Category: Certified Mechanical Contractor
Bond Limit Single Project: \$100,000,000.00

The School Board has approved the recommendation of prequalification for your company.

This certificate is to verify that your company has met all of the requirements as set forth in School Board Policy for the prequalification of contractors and trades and as set forth in Florida Statutes 287.055(3)(b) for the prequalification of professional services and is approved to submit work within appropriate trade categories and bond limits.

This certificate shall expire on March 26, 2025. It is the sole responsibility of the certificate holder to renew this certificate within a timely period prior to the expiration date to maintain continuous prequalification.



Florida Department of Agriculture and Consumer Services
Division of Consumer Services
2005 Apalachee Pkwy
Tallahassee, Florida 32399-6500

February 15, 2022

JOSEPH A. FRIDLEY
TRANE US, INC.
8929 WESTERN WAY STE 1
JACKSONVILLE, FL 32256-8391

SUBJECT: Registration Number: LQ33983, Exams: M5, Expiration Date: February 14, 2025
TRANE US, INC. LI30995

This Master Certificate is issued pursuant to Chapter 527, Florida Statutes. This certificate is valid only for the person and business licensed holder listed. Any changes to the Master status (such as transfer or termination of employment) must be reported to the Bureau of Compliance at (850) 921-1600 immediately.

The Master Certificate is valid only through the date noted on the Certificate. A notice of renewal will be sent in advance of your expiration date. A Master Certificate may be renewed if certification of a minimum of 16 (sixteen) hours continuing education is provided along with the renewal form. If training cannot be documented, an examination must be taken.

If there are any errors on the certificate, please submit all changes in writing to the department. If you have any questions, please call the Division of Consumer Services toll free at (800) HELP-FLA (435-7352), or 850-410-3800 if calling from outside Florida.

Cut Here



State of Florida
Department of Agriculture and Consumer Services
Division of Consumer Services
(850) 921-1600
2005 Apalachee Pkwy
Tallahassee, Florida 32399-6500

Registration No.: **LQ33983**
Issue Date: February 14, 2022
Expiration Date: February 14, 2025

Master Qualifier Certificate

This certificate is issued under the authority of Section 527.02, Florida Statutes.

JOSEPH A. FRIDLEY LI30995
TRANE US, INC.
8929 WESTERN WAY STE 1
JACKSONVILLE, FL 32256-8391

Nicole Fried

NICOLE "NIKKI" FRIED
COMMISSIONER OF AGRICULTURE



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

CONSTRUCTION INDUSTRY LICENSING BOARD

THE CLASS A AIR CONDITIONING CONTRACTOR HEREIN IS CERTIFIED UNDER THE
PROVISIONS OF CHAPTER 489, FLORIDA STATUTES

FRIDLEY, JOSEPH ALAN

TRANE U.S. INC.
8929 WESTERN WAY
JACKSONVILLE FL 32256

LICENSE NUMBER: CAC1814546

EXPIRATION DATE: AUGUST 31, 2024

Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.

Arley Fisher: Service Technician

19 Years HVAC Industry Experience
3 Years with Trane U.S. Inc.

PROFESSIONAL:

Perform service, maintenance, and repair of HVAC equipment for Commercial / Industrial HVAC systems and controls. Commercial / Industrial refrigeration process systems. Centrifugal chillers, Screw chillers, Package Rooftop VAV Systems, Scroll equipment and unitary systems, Hydronic heating and cooling technology in high rise applications, Water and mechanical side cooling tower maintenance. Estimate and install equipment. Quote repairs, Retrofits or Replacements as needed.

TRAINING:

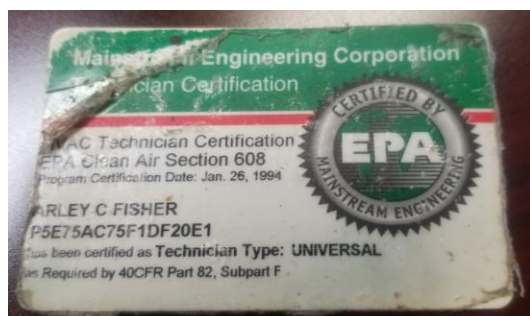
Trane RTAA Chiller training
Honeywell Burner and Boiler Controls training
AAON Factory training
Danfoss/Turbocor Factory Training

EDUCATION:

High School Diploma
Technical College Certificate

ACCREDITATIONS:

EPA Universal Refrigerant License.



Pelham High School

Pelham



Georgia



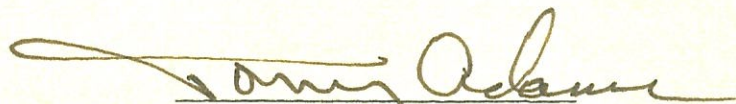
This Certifies That


Arley Charles Fisher

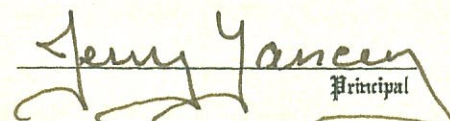
Has satisfactorily completed a Course of Study as prescribed by the Georgia Board of Education and the Pelham Board of Education and is therefore awarded this

D i p l o m a

Given this nineteenth day of May, two thousand.


Chairman Board of Education


Superintendent


Principal



Southwest Georgia Technical College

Thomasville, Georgia

This certifies that

Arley C. Fisher, III

has satisfactorily completed the requirements of the course in

Air Conditioning Technology

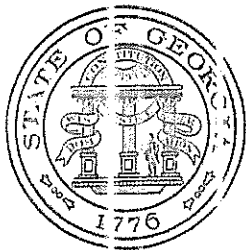
under standards approved by the Board of Technical and Adult Education

and is hereby awarded this

Diploma

In Witness Whereof we have hereunto affixed our signatures and the seal

this nineteenth day of June, two thousand and three.



[Signature]

Commissioner, Department of Technical
and Adult Education

[Signature]

President

Southwest Georgia
TECHNICAL COLLEGE

Southwest Georgia Technical College
TECHNICAL CERTIFICATE OF CREDIT

This is to certify that

Arley C. Fisher, III

Having successfully completed the 22 credit hour program in

Basic Air Conditioning

as authorized by the

*Georgia Board of Technical and Adult Education and the Board of
Directors of Southwest Georgia Technical College is hereby awarded this
Technical Certificate of Credit*

This nineteenth day of June, two thousand three.





COMMISSIONER, GEORGIA DEPARTMENT
OF TECHNICAL AND ADULT EDUCATION



PRESIDENT, SOUTHWEST GEORGIA TECHNICAL COLLEGE
Thomasville, Georgia



CERTIFICATE OF ACHIEVEMENT

Presented to

Arley C. Fisher

In Recognition of Academic Excellence

And Being Named To The

*President's List of
Southwest Georgia Technical College*

Freida H. Hill

President, Southwest Georgia Technical College

[Signature]

Instructor

Winter Quarter, 2001

Date



CERTIFICATE OF TRAINING

This certificate is presented to

Arley C. Fisher, III

for completing a course on

Honeywell Burner and Boiler Controls

September 22, 2011

DATE

Dave Krause

INSTRUCTOR

Honeywell

Danny Kilgore

SPONSOR

 **Stromquist
& Company**

Certificate of Completion

Presented to:

Arley Fisher

*in recognition of completing factory training on AAON
Air Conditioning Equipment and becoming a
Factory Trained Service Technician*

Issued this 25th day of September, 2012 at AAON, Inc., Tulsa, Oklahoma





Billy Strength, Instructor



CERTIFICATE OF COMPLETION

IS HEREBY GRANTED TO

Arley Fisher, III

to certify that he has completed to satisfaction

Course 107: COMPRESSOR OPERATION, SERVICE & REPAIR 1

Attended: October 15 - 16, 2013

No. 133

A handwritten signature in black ink, appearing to read "Brian Selph".

Brian Selph, Training Instructor & Compressor Technical Specialist

CERTIFICATE OF COMPLETION

This Certificate Given In Dedication To Service Training.
This Certifies That

ARLEY C. FISHER, III

Completed The Course Of Study On
"ALTERNATIVE REFRIGERANTS-
THE MOVE TO HFCs"



National Training Director
Training Date May 3rd, 2005
NATE Course No. 1341

ICOR
International

Making your life easier.



Technical Support
Supervisor

This Certificate is Awarded to

Arley Fisher III

For the successful Completion of

Variable Speed Troubleshooting and Repair

An Air Supply General Inc. training course



Instructor

25 January 2007

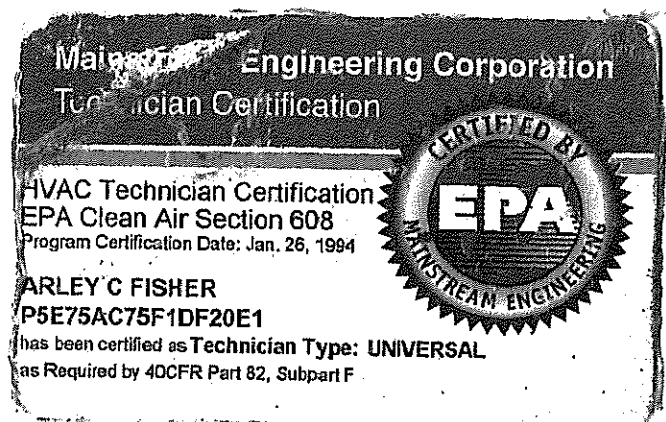




Arley Fisher
Factory Trained Technician
Technician # 3150

September 25, 2012

A handwritten signature in dark ink, appearing to read "Shu", enclosed within a circular scribble.



Miles Brady Vincent: SERVICE TECHNICIAN

6 Years HVAC Industry Experience
1 Years with Trane U.S. Inc.

PROFESSIONAL:

Perform service, maintenance and repair HVAC equipment for Commercial / Industrial HVAC systems and controls. Centrifugal chillers, Controls based heat pumps, Split systems, Package rooftops, Gas and Oil heating, screw chillers, Scroll equipment and Unitary systems, estimate and install controls and equipment. Quote repairs, Retrofits or Replacements as needed.

TRAINING:

Lively Technical College HVAC
Lively Technical College Welding 1 and 2
Lively Technical College Industrial Pipe Fitting
Stulz Factory Certified Technician
LMS: CenTraVac Operation and maintenance, trouble shooting, motor cooling, purge
HVAC Electrical troubleshooting
Rebuilding Pumps and Motors
Centrifugal training

ACCREDITATIONS:

Universal Refrigeration Certification

Lively Technical College

This is to Certify that

Miles Vincent

has completed 600 hours of training in

Heating, Ventilation, Air-Conditioning/Refrigeration 2

as prescribed by the


Florida Division of Adult and Career Education

and is hereby presented this

Certificate of Completion

Given at Tallahassee, Florida this twenty-sixth day
of May in the year two thousand and twenty.

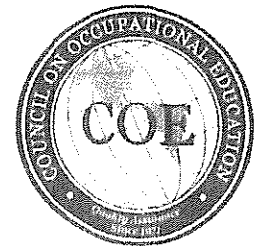



Shelly L. Bell, Director



Lively
Technical
College


Darien Trim, Instructor





WELDER and WELDING OPERATOR PERFORMANCE QUALIFICATION RECORD

Welder's Name: MILES VINCENT**ATF No:** 181124**Test No.** 042**Welder's SS No.** XXX-XX- 1411**Date:** 03/11/19**Reference WPS No:** LTC-D1.1-SM-1

| VARIABLE | QUALIFICATION TEST DETAIL | QUALIFICATION RANGE* |
|--|---|---|
| Code or Specification Used: | D1.1 | D1.1 |
| Welding Process and Type: | SMAW <input checked="" type="checkbox"/> Manual <input type="checkbox"/> Semiautomatic <input type="checkbox"/> Mechanized <input type="checkbox"/> Automatic | SMAW <input checked="" type="checkbox"/> Manual <input type="checkbox"/> Semiautomatic <input type="checkbox"/> Mechanized <input type="checkbox"/> Automatic |
| Backing: | <input type="checkbox"/> Used <input checked="" type="checkbox"/> Not Used | Required if used WITH-OUT |
| Base Metal Spec/P or M-Number | A36B - P1 | P1- P15F,P34,P41-49 |
| Plate/Pipe Thickness – Groove | Plate <input checked="" type="checkbox"/> Pipe <input type="checkbox"/> Thick. 3/8" | |
| Plate/Pipe Thickness – Fillet | Plate <input type="checkbox"/> Pipe <input type="checkbox"/> Thick. | ALL |
| Pipe/Tubular Outside Diameter – Groove | | |
| Pipe/Tubular Outside Diameter – Fillet | | ALL |
| Filler Metal Specification No. | AWS 5.18 - A5.1 | AWS A5.18-A5.28-A5.1-A5.5 |
| Classification No. | E6010/E7018 | ALL |
| F No. | | |
| Diameter | SMAW 3/32-1/8 | ALL |
| Consumable Insert | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | NA |
| Penetration Enhancing Flux | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | NA |
| Deposited Weld Metal Thickness | 0.125 - 0.500 | |
| Current/Polarity & Current Range | Type/Polarity: DCEP Range: Amperes 95-130 | SMAW DCEP |
| Metal Transfer Mode (GMAW or FCAW) | | NA |
| Torch Shielding Gas | Type: Flow: | NA |
| Root Shielding Gas | <input type="checkbox"/> NA Type: Flow: | NA |
| Position(s) | Test Position(s) (1G, 2G, etc.): 3G-4G | Qualified Position(s) (F, H, V, O, or All) ALL |
| Vertical Progression | <input checked="" type="checkbox"/> Uphill <input type="checkbox"/> Downhill | <input checked="" type="checkbox"/> Uphill <input type="checkbox"/> Downhill |

* NOTE: Insert NA for Variables that are identified as Non-essential in the Code or Specification used for the Performance Qualification Test

| MECHANICAL TEST RESULTS | | | |
|---|---------|---|---------|
| Type And Figure No. | Results | Type And Figure No. | Results |
| 3-G BEND-ROOT | PASS | 4-G BEND-FACE | PASS |
| 3-G BEND-FACE | PASS | | |
| 4-G BEND-ROOT | PASS | | |
| Guided mechanical Testing Conducted By: FLOYD ROBERTS Date: 03/11/19 | | | |
| NONDESTRUCTIVE EXAMINATION RESULTS | | | |
| Radiographic Results: | | Report No. | |
| Radiographic Testing Conducted By: | | | |
| Welding Witnessed By: FLOYD ROBERTS | | Visual Inspection: <input checked="" type="checkbox"/> Pass <input type="checkbox"/> Fail (reason TRAP SLAG/VISUA | |
| We certify that the statements in this record are correct and the test welds were prepared, welded and tested in accordance with the requirements of: AWS D1.1- , AWS B2.1- Other: D1.1 | | | |
| Date Qualified: 03/11/19 | | ATF Name and Number: LIVELY TECHNICAL CENTER 181124 Signed By: CWI No. 07050371 | |



WELDER and WELDING OPERATOR PERFORMANCE QUALIFICATION RECORD

Welder's Name: MILES VINCENT**ATF No:** 181124**Test No.** 051**Welder's SS No.** XXX-XX- 1411**Date:** 04/04/19**Reference WPS No:** LTC-D1.1-GM-2

| VARIABLE | QUALIFICATION TEST DETAIL | QUALIFICATION RANGE* |
|---|---|---|
| Code or Specification Used: | AWS D1.1 | AWS D1.1 |
| Welding Process and Type: | GMAW-S <input type="checkbox"/> Manual <input checked="" type="checkbox"/> Semiautomatic <input type="checkbox"/> Mechanized <input type="checkbox"/> Automatic | GMAW-S <input type="checkbox"/> Manual <input checked="" type="checkbox"/> Semiautomatic <input type="checkbox"/> Mechanized <input type="checkbox"/> Automatic |
| Backing: | <input type="checkbox"/> Used <input checked="" type="checkbox"/> Not Used | Required if used WITH-OUT |
| Base Metal Spec/P or M-Number | ASTM A36 | Carbon and low alloy steels |
| Plate/Pipe Thickness – Groove | Plate <input checked="" type="checkbox"/> Pipe <input type="checkbox"/> Thick. 0.375" | .125"-0.750" CJP |
| Plate/Pipe Thickness – Fillet | Plate <input type="checkbox"/> Pipe <input type="checkbox"/> Thick. N/A | .125"- Unlimited |
| Pipe/Tubular Outside Diameter – Groove | N/A | N/A |
| Pipe/Tubular Outside Diameter – Fillet | N/A | All Diameters |
| Filler Metal Specification No. | AWS A5.18 | AWS A5.18 and A5.28 |
| Classification No. | ER70S-6 | All ERXX-X for carbon steel |
| F No. | F6 | F6 |
| Diameter | .035" | All Diameters |
| Consumable Insert | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | NA |
| Penetration Enhancing Flux | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | NA |
| Deposited Weld Metal Thickness | 0.375 plus weld reinforcement | NA |
| Current/Polarity & Current Range | Type/Polarity: DC Electrode + Range: 115-120 Amperes | All |
| Metal Transfer Mode (GMAW or FCAW) | Short Circuit | Short Circuit |
| Torch Shielding Gas | Type: Argon / Co2 Flow: 35 CFH | NA |
| Root Shielding Gas | <input checked="" type="checkbox"/> NA Type: Flow: | NA |
| Position(s) | Test Position(s) (1G, 2G, etc.): 3G / 4G | Qualified Position(s) (F, H, V, O, or All) All |
| Vertical Progression | <input checked="" type="checkbox"/> Uphill <input type="checkbox"/> Downhill | <input checked="" type="checkbox"/> Uphill <input type="checkbox"/> Downhill |

* NOTE: Insert NA for Variables that are identified as Non-essential in the Code or Specification used for the Performance Qualification Test

| MECHANICAL TEST RESULTS | | | |
|--|---------|--|---------|
| Type And Figure No. | Results | Type And Figure No. | Results |
| 3G Face Bend | PASS | 3G Root Bend | PASS |
| 4G Face Bend | PASS | 4G Root Bend | PASS |
| Guided mechanical Testing Conducted By: Floyd Roberts Date: 04/04/19 | | | |
| NONDESTRUCTIVE EXAMINATION RESULTS | | | |
| Radiographic Results: | | Report No. | |
| Radiographic Testing Conducted By: | | | |
| Welding Witnessed By: Floyd Roberts | | Visual Inspection: <input checked="" type="checkbox"/> Pass <input type="checkbox"/> Fail (reason) | |
| We certify that the statements in this record are correct and the test welds were prepared, welded and tested in accordance with the requirements of: AWS D1.1- 2015, AWS B2.1- Other: | | | |
| Date Qualified: 04/04/19 | | ATF Name and Number: Lively Technical Center 181124 Signed By: CWI No. 07050371 | |



Board of Trustees confers upon

Miles Vincent

this certificate of completion for

Pipefitting Level One

*in the Standardized Craft Training Program
on this Twenty-Ninth day of March, in the year 2021*



Boyd D. Worsham
President & CEO, NCCER



NCCER

Board of Trustees confers upon

Miles Vincent

this certificate of completion for

Pipefitting Level Two

in the Standardized Craft Training Program
on this Twelfth day of May, in the year 2021



A handwritten signature in dark ink, appearing to read "Boyd D. Worsham", written over a horizontal line.

Boyd D. Worsham
President & CEO, NCCER



NCCER

Board of Trustees confers upon

Miles Vincent

this certificate of completion for

Core

in the Standardized Craft Training Program
on this Twenty-Ninth day of March, in the year 2021



A handwritten signature in black ink, appearing to read "Boyd D. Worsham", written over a horizontal line.

Boyd D. Worsham
President & CEO, NCCER



CERTIFICATE OF TRAINING

This award certifies that

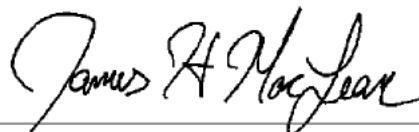
Miles "Brady" Vincent

Has participated and successfully completed

STULZ Interactive Precision Cooling and Microprocessor Controls Training

Issued Date: 04/22/2022

Expiration Date: 10/21/2023



James MacLean, Product Support Training Program Manager



Sarah Shumaker, Senior Manager Product Support

NCCER

Board of Trustees confers upon

Miles Vincent

this certificate of completion for

Pipefitting Level One

in the Standardized Craft Training Program
on this Twenty-Ninth day of March, in the year 2021




Boyd D. Worsham
President & CEO, NCCER



Cody Stephens HVAC Technician

8 Years HVAC Industry Experience
3 Years with Trane U.S. Inc.

PROFESSIONAL:

Perform service, maintenance and repair HVAC equipment for Commercial / Industrial HVAC systems, refrigeration ,air compressors , air dryers , ice machines and controls. Centrifugal chillers, Controls based heat pumps, Split systems, Package rooftops, screw chillers, Scroll equipment and Unitary systems, estimate controls equipment. Quote repairs.

TRAINING:

HVAC Electrical Trouble Shooting
OSHA
Screw Chiller Training Instructor
Centrifugal training
Controls training

ACCREDITATIONS:

Universal Refrigeration Certification



CERTIFICATE OF COMPLETION - 2021

presented by KCC Manufacturing to

Cody Stephens

for completion of eight hours of start-up training
with Jordan Reynolds and KCC Manufacturing on
the Trane Horizon Units



This is to certify that

Cody Stephens

has successfully completed

CenTraVac Operation & Maintenance

Troubleshooting Operation & Maintenance Virtual

December 10, 2020

traneuniversity@trane.com

TRANE
TECHNOLOGIES

Certificate of Completion

This is to certify that

Delray Miller

Certificate Number

2111401

has been certified as a

Technician TYPE UNIVERSAL

Certified by
ARI
EPA Approved
September 30, 1993

as required by 40 CFR 82 Subpart F.

591-05-1890

ID Number

8/03/95

Date



AIR-CONDITIONING
& REFRIGERATION
INSTITUTE



awards this

Certificate of Achievement

to

Delray Miller

for completing the requirements of the

3V System Training for Contractors

11/1/2007 - 11/2/2007

A handwritten signature in dark ink, reading "Ted Kliszczewicz".

Ted Kliszczewicz



Carrier Corporation

hereby certifies that

Delray Miller

has completed the Carrier University program
at Carrier's Corporate Facility in Indianapolis, Indiana

September 10 - September 12

and has demonstrated outstanding skills
in identifying and satisfying customer needs.

Herman Kling, Vice President Sales and Brands, RLCS

Rick Roetken, Carrier Brand Manager

Tested By: Carrier Florida



North American Technician Excellence

Be it known that

Delray L Miller

has successfully passed the examinations administered by
North American Technician Excellence
and is awarded this certificate as evidence of competency as a(n)

Air-to-Air Heat Pump — Service Technician

A handwritten signature in black ink, appearing to read "Rex P. Boynton", is written over a horizontal line.

Rex P. Boynton, President

Test Date: December 17, 2008

Certification Date: December 30, 2008

NATE ID # 8905589

Certificate Issue Date: December 30, 2008

Certification Expires: December 2013



Certificate of Achievement

Awarded to

DELRAY MILLER

for completing all the requirements of the
Application & Service Training for the
Environmentally Sound Refrigerant, Puron™



LEO ROZYCKE

Instructor

EQUIPMENT SALES CORP

Distributor

6-29-1998

Date



TRANE®

This is to certify that

Delray Miller

has successfully completed

*Tech Trek I - Controls Training for Service
Technicians - St Paul, MN*

3rd October 2014



Trane is authorized by IACET to offer
3.5 CEU's for this program

544093064

Trane University



CERTIFICATE OF MERIT

AWARDED TO
DEL RAY MILLER

FOR SUCCESSFUL COMPLETION OF

Voyager Micro Control Systems

Daren McMillen

Instructor

Richard Atchison

Unitary Sales Manager



CLASS DATE : 02-15-01

SPONSOR #
004 0000935

CREDIT HOURS
3

COURSE #
004 0003390



TRANE®

This is to certify that

Delray Miller

has successfully completed

Tracer SC Operation - El Paso, TX

9th May 2013



Trane is authorized by IACET to offer
1.8 CEU's for this program

540160097

Trane University





TRANE®

This is to certify that

Delray Miller

has successfully completed

TGP2 Advanced Applications - Chicago, IL

4th October 2013



Trane is authorized by IACET to offer
3.5 CEU's for this program

540658055

Trane University



Delray Miller: Service Technician

33 Years HVAC Industry Experience
8 Years with Trane U.S. Inc.

PROFESSIONAL:

Install, commission, diagnose, and repair BAS controls; includes Tracer Ensemble, Tracer SC, Tracer Summit, VariTrac, BACnet, LONtalk, COMM 4, COMM 3, UC600, UC400 and MP580. Create and modify TGP I & II programs, CPL programs, TGE custom graphics, and Tracer Summit Custom Graphics. Diagnose and repair centrifugal and air-cooled chillers, packaged and split DX units, air-handlers, 100% outside air units, process and DATA air units, and boilers.

TRAINING:

Tracer TGP2 Advanced Applications,
Tracer System Integration Install & Commission
Tracer SC Air Systems,
Tracer SC Operation
Tracer Summit
Tracer Tech Trek I
Carrier 3V Controls
ARI Refrigerant Card
Previously NATE Certified
United Scissors Lift Certified Operator
CJIS Security Clearance

EDUCATION:

Bachelor of Arts in Music / Florida State University 1997

ACCREDITATIONS

EPA Universal Refrigerant License.

Delray Miller: Service Technician

33 Years HVAC Industry Experience
8 Years with Trane U.S. Inc.

PROFESSIONAL:

Install, commission, diagnose, and repair BAS controls; includes Tracer Ensemble, Tracer SC, Tracer Summit, VariTrac, BACnet, LONtalk, COMM 4, COMM 3, UC600, UC400 and MP580. Create and modify TGP I & II programs, CPL programs, TGE custom graphics, and Tracer Summit Custom Graphics. Diagnose and repair centrifugal and air-cooled chillers, packaged and split DX units, air-handlers, 100% outside air units, process and DATA air units, and boilers.

TRAINING:

Tracer TGP2 Advanced Applications,
Tracer System Integration Install & Commission
Tracer SC Air Systems,
Tracer SC Operation
Tracer Summit
Tracer Tech Trek I
Carrier 3V Controls
ARI Refrigerant Card
Previously NATE Certified
United Scissors Lift Certified Operator
CJIS Security Clearance

EDUCATION:

Bachelor of Arts in Music / Florida State University 1997

ACCREDITATIONS

EPA Universal Refrigerant License.



TRANE®

This is to certify that

Delray Miller

has successfully completed

Tracer SC Operation - El Paso, TX

9th May 2013



Trane is authorized by IACET to offer
1.8 CEU's for this program

540160097

Trane University





TRANE®

This is to certify that

Delray Miller

has successfully completed

Tracer Summit 101 - LP

30th December 2011



Trane is authorized by IACET to offer
3.5 CEU's for this program

542046727

Trane University



COLLEGE OF BUILDING AUTOMATION

This is to certify that

Delray Miller

has successfully completed

BACnet Fundamentals BETA

Gene Shedivy

Gene Shedivy
Global Controls
Product Controls Leader

Brad Klatt

Brad Klatt
Trane College of Building Automation
Technical Training Leader

4/28/2017

Date completed



© 2007 Trane

All rights reserved

COLLEGE OF BUILDING AUTOMATION

This is to certify that

Miller, Delray

has successfully completed

LonTalk Fundamentals

Gene Shedivy

Gene Shedivy
Global Controls
Product Controls Leader

Brad Klatt

Brad Klatt
Trane College of Building Automation
Technical Training Leader

4/8/2017

Date completed



© 2007 Trane

All rights reserved



TRANE®

This is to certify that

Delray Miller

has successfully completed

*Tracer™ System Integration Install &
Commission*

May 5, 2017



Trane is authorized by IACET to offer
3.5 CEU's for this program

6427~541106547

Trane University





TRANE®

This is to certify that

Delray Miller

has successfully completed

Tracer SC Air Systems

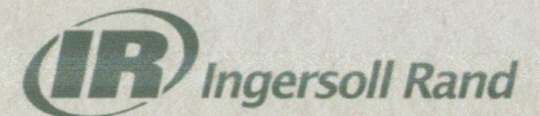
January 15, 2016



Trane is authorized by IACET to offer
3.5 CEU's for this program

688631585

Trane College of Building Automation





This is to certify that
Delray Miller
has successfully completed
Tracer SC Operation

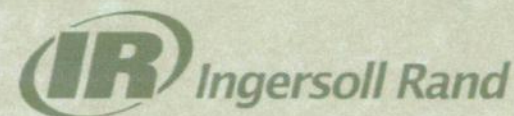
May 9, 2013



Trane is authorized by IACET to offer
1.8 CEU's for this program

150765585

Trane College of Building Automation





TRANE®

This is to certify that

Delray Miller

has successfully completed

Tracer Summit 101

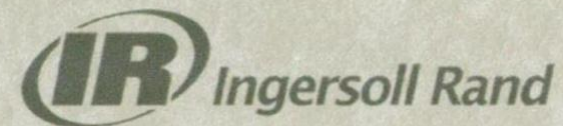
October 14, 2011



Trane is authorized by IACET to offer
3.5 CEU's for this program

91256721

Trane College of Building Automation





TRANE®

This is to certify that

Delray Miller

has successfully completed

Tech Trek I - Controls Training for Service Technicians

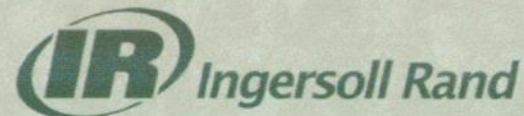
October 3, 2014



Trane is authorized by IACET to offer
3.5 CEU's for this program

190014583

Trane College of Building Automation





TRANE®

This is to certify that

Delray Miller

has successfully completed

TGP2 Advanced Applications

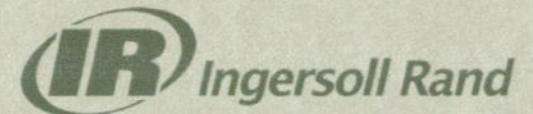
October 4, 2013



Trane is authorized by IACET to offer
3.5 CEU's for this program

153218556

Trane College of Building Automation





CERTIFICATE OF COMPLETION

Is hereby granted to:

Eric Strauss

of

TRANE

TR-200 DRIVE STARTUP & BASIC TROUBLESHOOTING

3/11/2015



Signature

Jeff Olson



IACET CONTINUING EDUCATION UNITS (CEU) AWARDED = 14 CONTINUING EDUCATIONS HOURS (CEH) AWARDED = 14

Matt Craig: SERVICE TECHNICIAN

20 Years HVAC Industry Experience
9 Years with Trane U.S. Inc.

PROFESSIONAL:

Perform service, maintenance and repair HVAC equipment for Commercial / Industrial HVAC systems and controls. Centrifugal chillers, Both Air and water cooled chillers, Controls based heat pumps, Split systems, Package rooftops, Gas and Oil heating, Unitary systems, Estimate and quote repairs, Retrofits or Replacements as needed.

TRAINING:

Locklin Technical College HVAC Program
Trane Lacrosse RTWD and Absorption Chillers

ACCREDITATIONS:

Universal Refrigeration Certification



TRANE®

This is to certify that

Michael Raley

has successfully completed

Controls Training for Service Technicians

October 26, 2018



Trane is authorized by IACET to offer
3.2 CEU's for this program

6964~589265406

Trane University

4833 White Bear Parkway, St. Paul, MN 55110



Mike Raley

**This certificate is awarded in recognition of
successful completion of
Controls Technician I (Trane Controls Technician)**

January 25, 2019

Mike Raley

**This certificate is awarded in recognition of
successful completion of
Controls Technician II (Trane Controls Technician)**

January 25, 2019

Mike Raley

**This certificate is awarded in recognition of
successful completion of
Controls Technician III (Trane Controls Technician)**

January 25, 2019



LET'S GO BEYOND™

This is to certify that

Mike Raley

has successfully completed

Introduction to LonTalk

December 9, 2017

Trane University





LET'S GO BEYOND™

This is to certify that

Mike Raley

has successfully completed

Introduction to Computer Networking on Tracer

October 18, 2018

Trane University





LET'S GO BEYOND™

This is to certify that

Mike Raley

has successfully completed

Introduction to IP Networking

January 21, 2019

Trane University





This is to certify that
Michael Raley
has successfully completed
LonTalk Fundamentals

December 9, 2017

3304~589265406

Michael E Raley Jr. : HVAC Service Technician

8 Years HVAC Industry Experience
1.5 Years with Trane U.S. Inc.

PROFESSIONAL:

Perform service, maintenance, and repair of HVAC equipment for Commercial / Industrial HVAC systems and controls. Commercial / Industrial refrigeration process systems. Centrifugal chillers, Screw chillers, Package Rooftop VAV Systems, Scroll equipment and unitary systems, Hydronic heating and cooling technology in high rise applications, Water and mechanical side cooling tower maintenance. Estimate and install equipment. Quote repairs, Retrofits or Replacements as needed.

TRAINING:

Trane Controls Training for Service Technicians.
Trane SC+ 101 training.
Trane Online Controls Training (LMS)
Total Tech HVAC Analysis I & II Technician Training Courses
Trane Safety Training

EDUCATION:

Associates Degree in Electrical Technologies (Bainbridge State College).
High School Diploma.

ACCREDITATIONS:

EPA Universal Refrigerant License.

Michael E Raley Jr. : HVAC Service Technician

8 Years HVAC Industry Experience
1.5 Years with Trane U.S. Inc.

PROFESSIONAL:

Perform service, maintenance, and repair of HVAC equipment for Commercial / Industrial HVAC systems and controls. Commercial / Industrial refrigeration process systems. Centrifugal chillers, Screw chillers, Package Rooftop VAV Systems, Scroll equipment and unitary systems, Hydronic heating and cooling technology in high rise applications, Water and mechanical side cooling tower maintenance. Estimate and install equipment. Quote repairs, Retrofits or Replacements as needed.

TRAINING:

Trane Controls Training for Service Technicians.
Trane SC+ 101 training.
Trane Online Controls Training (LMS)
Total Tech HVAC Analysis I & II Technician Training Courses
Trane Safety Training

EDUCATION:

Associates Degree in Electrical Technologies (Bainbridge State College).
High School Diploma.

ACCREDITATIONS:

EPA Universal Refrigerant License.



CERTIFICATE OF COMPLETION - 2021

presented by KCC Manufacturing to

Mike Raley

for completion of eight hours of start-up training
with Jordan Reynolds and KCC Manufacturing on
the Trane Horizon Units



LET'S GO BEYOND™

TRANE UNIVERSITY™

4833 White Bear Parkway, St. Paul, MN 55110

This is to certify that

Mike Raley

has successfully completed

***Pre-Work for Controls Training for Service
Technicians***

November 12, 2018



Trane University is authorized by IACET to offer
CEU's for this program.





LET'S GO BEYOND™

This is to certify that

Mike Raley

has successfully completed

TGP2 Fundamentals Course

May 31, 2018

Trane University





LET'S GO BEYOND™

This is to certify that

Mike Raley

has successfully completed

Tracer MP580/581 Hardware and Installation

June 1, 2018

Trane University





LET'S GO BEYOND™

This is to certify that

Mike Raley

has successfully completed

Tracer MP580/581 Setup and Troubleshooting

June 1, 2018

Trane University





LET'S GO BEYOND™

This is to certify that

Mike Raley

has successfully completed

Basic Chiller Logging

December 9, 2017

Trane University





TRANE®

This is to certify that

Robert Strauss

has successfully completed

Trane Only - CenTraVac Mechanical Service

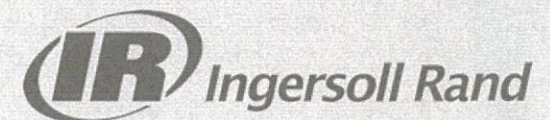
June 17, 2016



Trane is authorized by IACET to offer
3.5 CEU's for this program

736410259

Trane University



Nolyn Stephens

Skills and Experience

- Service and maintain both Air and water cooled Centrifugal, Scroll and Screw Chillers, RTU's, and VRF systems
- Complete change out of equipment
- Performed duct repairs as needed.
- Multi-level trouble shooting and diagnostic skills
- Advanced troubleshooting on many different types of Equipment (Gas, Water Source, Heat Pumps)
- Replacement of many different HVAC parts including but not limited to Coils, Compressors, TXV's, Motors, and Pumps.

Training

2024 - Present Day

Trane Symbio 7 and 800 Controls

Trane Apprenticeship Program

Tracca Apprenticeship Program

- Refined Basic HVAC Knowledge
- Advanced refrigeration & electrical comprehension
- Hands on with many different types of HVAC refrigeration & electrical circuits.

February 2020

Ultimate Technical Academy, Little Rock AR - *Training*

- Advanced Refrigeration Cycles
- Advanced Electrical & AirFlow Diagnostics

Education

Class of 2019

Wakulla High School, Crawfordville Fl. (High School Diploma)

2018-2019

Tallahassee Community College, Tallahassee Fl.

Matt Craig: SERVICE TECHNICIAN

20 Years HVAC Industry Experience
9 Years with Trane U.S. Inc.

PROFESSIONAL:

Perform service, maintenance and repair HVAC equipment for Commercial / Industrial HVAC systems and controls. Centrifugal chillers, Both Air and water cooled chillers, Controls based heat pumps, Split systems, Package rooftops, Gas and Oil heating, Unitary systems, Estimate and quote repairs, Retrofits or Replacements as needed.

TRAINING:

Locklin Technical College HVAC Program
Trane Lacrosse RTWD and Absorption Chillers

ACCREDITATIONS:

Universal Refrigeration Certification

Tab C



Trane U.S. Inc.
2213 South 20th Street (Building 12-1)
La Crosse, WI 54601USA
T: (608) 787-2000

CERTIFICATE OF AUTHORIZATION

I, Scott Smillie, Assistant Secretary of Trane U.S. Inc., 2213 South 20th Street, La Crosse, WI 54601, a Delaware corporation, do hereby certify that Joseph Follenweider who signed the attached document, is General Sales Manager for Trane U.S. Inc. and that he is duly authorized to execute such documents on behalf of the corporation in connection with the following Contract:

REQUEST FOR PROPOSAL (RFP) - HVAC Installation, Maintenance, and Repair Services RFP 256-2025

(CORPORATE SEAL)





Scott Smillie – Assistant Secretary

4/2/2024

Date

Attachment II Required Provisions Certifications

1. Business/Corporate Experience

This is to certify that the Proposer is:

- Duly licensed to conduct business in the State of Florida;
- Has a minimum of three (3) years in the last five (5) as a heating and air conditioning system Contractor, doing installation, maintenance, and repairs for commercial or governmental customers of the same nature as those sought by the District;

2. Prime Vendor

This is to certify that the Successful Proposer will act as the Prime Contractor to the District for all services provided under the Contract(s).

3. Meets Legal Requirements

This is to certify that the Proposer's Proposal and all services provided under the Contract will be compliant with all laws, rules, and other authority applicable to providing the services, including, but not limited to, Florida's Open Government laws (Article I, Section 24, Florida Constitution, Chapter 119, F.S.).

4. Financial Disclosure

This is to certify that the Proposer has disclosed in their Proposal all suspensions, revocations, bankruptcies, judgments, or liens in the last five (5) years.

5. Federal Debarment

This is to certify that neither the Proposer nor its principles are currently disbarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from participation in this solicitation by any Federal department or agency.

6. Conflict of Interest

Per Section 1001.42(12)(i), F.S., this certifies that no member of the Leon County School Board or the Superintendent has any financial interest in the Proposer whatsoever.

7. Statement of No Inducement

This is to certify that no attempt has been made or will be made by the Proposer to induce any other person or Contractor to submit or not to submit a Proposal with regards to this RFP. Furthermore, this is to certify that the Proposal contained herein is submitted in good faith and not subject to any agreement or discussion with, or inducement from, any Contractor or person to submit a complementary or other non-competitive Proposal.

8. Statement of Non-Disclosure

This is to certify that none of the contents of this Proposal have been disclosed before award, directly or indirectly, to any other Proposer or competitor.

9. Statement of Non-Collusion

This is to certify that the proposed costs in this Proposal have been arrived at independently, without consultation, communications, or agreement as to any matter relating to such costs with any other Proposer or with any competitor, and not to restrict competition.

10. Scrutinized Companies Certification

The Proposer certifies they are not listed on the Scrutinized Companies that Boycott Israel List, created under Section 215.4725, F.S., and they are not currently engaged in a boycott of Israel. If the resulting Contract exceeds \$1,000,000.00 in total, not including renewal years, the Proposer certifies that they are not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List created under Sections 215.473, F.S., and 215.4725, F.S., and further certifies they are not engaged in business operations in Cuba or Syria. In compliance with Sections 287.135(5), F.S., and 287.135(3), F.S., the Proposer agrees the District may immediately terminate the resulting Contract for cause if the Proposer is found to have submitted a false certification or if the Proposer is placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, or has engaged in business operations in Cuba or Syria during the term of the Contract. Any company that submits a bid or proposal for a contract, or intends to enter into or renew a contract with an agency or local governmental entity for commodities or services, of any amount, must certify that the company is not participating in a boycott of Israel.

By signing this certification below, the Authorized Representative affirms they have the authority to bind the Proposer and acknowledges and affirms the statements above.

STATE OF FLORIDA _____
COUNTY OF Duval _____
Authorized Representative (Print) **Authorized Representative (Signature)**

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization this 9th day of April, 2024, by Joe Follenweider (name of authorized representative) as General Sales Manager, North FL (position title) for Trane U.S. Inc. (Vendor Name).



Notary Signature
Angela K Harlow
Name of Notary (Typed, Printed, or Stamped)

Personally Known X OR Produced Identification _____ Type of Identification _____

Attachment III
Notice of Conflict of Interest

Company Name: Trane U.S. Inc.
[Proposers shall complete either Section 1 or Section 2]

Solicitation Number: RFP 254-2024

To participate in this solicitation process and comply with the provisions of Chapter 112.313, Florida Statutes, the undersigned corporate officer hereby discloses the following information to the Leon County School Board.

Section 1

I hereby certify that no official or employee of the School Board requiring the goods or services described in these specifications has a material financial interest in this company.



Authorized Representative (Signature)

Joe Follenweider


Authorized Representative (Print)

Not Applicable

Section 2

I hereby certify that the following named Leon County School Board official(s) and employee(s) have a material financial interest(s) (over 5%) in this company, and they have filed Conflict of Interest Statements with the Leon County Supervisor of Elections, before the Proposal Opening.

| Name | Title/Position | Date of Filing |
|-------|----------------|----------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |



Authorized Representative (Signature)

Joe Follenweider

Authorized Representative (Print)

4/9/2024

Date

Attachment IV Proposer Contact Information

The Proposer shall identify the contact information for solicitation and contractual purposes via the requested fields in the table below.

| | For solicitation purposes, the Proposer's representative shall be: | For contractual purposes, should the Proposer be awarded, the Proposer's representative shall be: |
|-----------------------------------|---|---|
| Name: | Mike Cunniff | Joe Follenweider |
| Title: | Account Manager | General sales Manager, North Florida |
| Street Address: | 109 - 1 Hamilton Park Drive | 8929 Western Suite 1 |
| City, State, Zip Code: | Tallahassee, Florida 32304 | Jacksonville, Florida 32256 |
| Telephone:(Office) | | +1 - 904-596-4158 |
| Telephone:(Cell) | +1 - 850-294-3112 | +1 - 904-476-5010 |
| Email: | mike.cunniff@trane.com | joe.follenweider@trane.com |

Trane U.S. Inc.



4/9/2024

Company Name

Authorized Representative (Signature)

Date

25-0900465

Joe Follenweider

FEIN #

Authorized Representative (Printed)

Attachment VI

Local Preference Affidavit

To qualify for the Local Vendor Preference, a Proposer must have a physical location in Leon County (or an Adjacent County), employ at least one (1) person at that location, and have been licensed, as required, for at least six (6) months before the Proposal Opening. The Proposer should have 200 employees or less and less than \$5,000,000 in adjusted gross income. The Proposer, on a day-to-day basis, should provide the goods/services provided under this Contract substantially from the local business address. Post Office boxes are not acceptable for purposes of obtaining this preference.

By completing this Affidavit, the Proposer affirms that it is a local or Adjacent County Business, as defined by Board Policy 6450.

Please complete the following in support of the self-certification:

Proposer Name: Trane U.S. Inc

Physical Address: 109-1 Hamilton Park Drive, Tallahassee, Florida 32304

County: Leon

Phone of Local Location: 850-574-1726

Length of Time at this Location: 40+ years. **# of Employees at this Location:** 18

Is your business certified as a Small Business Enterprise (SBE) through Leon County Schools? No

STATE OF FLORIDA

COUNTY OF Duval

Joe Follenweider



Authorized Representative (Print)

Authorized Representative (Signature)

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization this 9th day of April, 2024, by Joe Follenweider (name of authorized representative) as General Sales Manager, North FL (position title) for Trane U.S. Inc. (company name).




Notary Signature

Angela K Harlow

Name of Notary (Typed, Printed, or Stamped)

Personally Known ☒ **OR** Produced Identification ☐ Type of Identification _____

Attachment VII
Subcontracting Form

The Proposer shall complete the information below on all subcontractors that will be providing services to the Proposer to meet the requirements of the Contract, should the Proposer be awarded. Submission of this form does not indicate the District's approval of such subcontractor(s), but provides the District with information on proposed subcontractors for review.

Complete a separate sheet for each subcontractor.

Prime Proposer Name: Trane U.S. Inc.

Type/Description of Goods or Service Subcontractor will provide:
Crane Operations.

Subcontractor Company Name: Jackson Cook Cranes FEIN: 59-3759601

Contact Person: Josh Hunt Contact Phone Number: 850-576-4187

Address: 4418 Entrpot Ct., Tallahassee, Florida 32310

Email address: josh@jackson-cook.com

Currently Registered as a Small Business Enterprise (SBE) with Leon County Schools? Yes No X

Local Proposer per PO6450? Yes No X

In a job description format, identify the responsibilities and duties of the subcontractor based on the specifications or scope of services outlined in this solicitation.

Heavy equipment lifting.

Attachment VII
Subcontracting Form

The Proposer shall complete the information below on all subcontractors that will be providing services to the Proposer to meet the requirements of the Contract, should the Proposer be awarded. Submission of this form does not indicate the District's approval of such subcontractor(s), but provides the District with information on proposed subcontractors for review.

Complete a separate sheet for each subcontractor.

Prime Proposer Name: Trane U.S. Inc.

Type/Description of Goods or Service Subcontractor will provide:
High Voltage Electrical Work.

Subcontractor Company Name: Bonds Electric FEIN: 20-3612156

Contact Person: Ron Bonds Contact Phone Number: 850-545-8664

Address: 4092 N. Monroe Street, Tallahassee, Florida 32303

Email address: Services@bondstallahassee.com

Currently Registered as a Small Business Enterprise (SBE) with Leon County Schools? Yes ☐ No ☒

Local Proposer per PO6450? Yes ☐ No ☒

In a job description format, identify the responsibilities and duties of the subcontractor based on the specifications or scope of services outlined in this solicitation.

High voltage electrical repairs, disconnect and reconnect.

Attachment VIII
Drug-Free Workplace Certification

The undersigned Proposer, in accordance with Section 287.087, F.S., hereby certifies that.

Company Name

1. Publishes a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Informs employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counselling, rehabilitation, employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Gives each employee engaged in providing the commodities or contractual services sought in this solicitation a copy of the statement specified in Paragraph 1.
4. In the statement specified in Paragraph 1, notify the employees that, as a condition of working on the commodities or contractual services sought in this solicitation, the employee will abide by the terms of the statement and will notify the employer of any conviction of, a plea of guilty, or nolo contendere to, any violation of Chapter 893, F.S., or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Imposes sanctions on or requires satisfactory participation in a drug abuse assistance or rehabilitation program by any employee who is so convicted as available in their community.
6. Make a good faith effort to continue to maintain a drug-free workplace through the implementation of Paragraphs 1 through 5.

As the person authorized to sign this statement, I certify that this company complies fully with the above requirements.

Authorized Officer (Printed Name) Joe Follenweider

Authorized Officer (Signature) 

Date 4/9/2024

Attachment IX
Certification Regarding Debarment, Suspension,
Ineligibility and Voluntary Exclusion AD-1048
Lower Tier Covered Transactions

The following statement is made in accordance with the Privacy Act of 1974 (5 U.S.C. § 552a, as amended). This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, and 2 C.F.R. §§ 180.300, 180.335, Participants' responsibilities. The regulations were amended and published on August 31, 2005, in 70 Fed. Reg. 51865-51880. Copies of the regulations may be obtained by contacting the Department of Agriculture agency offering the proposed covered transaction.

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0505-0027. The time required to complete this information collection is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The provisions of appropriate criminal, civil, fraud, privacy, and other statutes may be applicable to the information provided.

(Read instructions on page two before completing certification.)

- a.** The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency;
- b.** Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

| | |
|--|---|
| ORGANIZATION NAME Trane U.S. Inc. | PR/AWARD NUMBER OR PROJECT NAME RFP 256-2025 |
| NAME(S) AND TITLE(S) OF AUTHORIZED REPRESENTATIVE(S) Joe Follenweider | |
| SIGNATURE(S) | DATE 4/9/2024 |

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotope, American Sign Language, etc.) should contact the responsible agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at How to File a Program Discrimination Complaint (<https://www.ascr.usda.gov/filing-program-discrimination-complaint-usda-customer>) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442.

Instructions for Certification

1. By signing and submitting this form, the prospective lower-tier participant is providing the certification set out on page 1 in accordance with these instructions.
2. The certification in this clause is a material representation of the fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower-tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension or debarment.
3. The prospective lower tier participant shall provide immediate written notice to the person(s) to whom this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549, at 2 C.F.R. Parts 180 and 417. You may contact the department or agency to which this proposal is being submitted for assistance in obtaining a copy of those regulations.
5. The prospective lower-tier participant agrees by submitting this form that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower-tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.
6. The prospective lower tier participant further agrees by submitting this form that it will include this clause titled "Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion - Lower Tier Covered Transactions," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower-tier covered transaction that is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the System for Award Management (SAM) database.
8. Nothing contained in the foregoing shall be construed to require the establishment of a system of records to render in good faith the certification required by this clause. The knowledge and information of a participant are not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized under paragraph (5) of these instructions, if a participant in a covered transaction knowingly enters into a lower-tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

Attachment X
CERTIFICATION REGARDING LOBBYING
CERTIFICATION FOR CONTRACTS, GRANTS, AND COOPERATIVE AGREEMENTS

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of Congress or an employee of a member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal-appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including sub-contracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

This certification is a material representation of the fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

By:  _____ Date: 4/9/2024
(Signature of Official (Executive Director) Authorized to Sign Application)

By: _____ Date: _____
(Signature of Official (Chief Financial Officer) Authorized to Sign Application)

For: _____
Name of Grantee

Title of Grant Program

Disclosure of Lobbying Activities

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

3.3.3 Type of Federal Action

- ☐ i. Contract
- ☐ ii. Grant
- ☐ b. Cooperative Agreements
- ☐ b. Loan
- ☐ c. Loan Agreement
- ☐ d. Loan Insurance

3.3.4 Status of Federal Action

- ☐ Bid/offer/application
- ☐ a. Initial award
- ☐ a. Post-award

3.3.5 Report Type

- ☐ 1. Initial filing
- ☐ a. Material changes

For a material change only:

Year: _____ Quarter: _____

Date of last report: _____

3.3.6 Name and Address of Reporting Entity

☐ Prime ☐ Subawardee ☐ Tier (if known)

Name: _____

Street: _____

City/State/ Zip _____

Congressional District (if known) _____

3.3.7 If Reporting Entity in No. 4 is a Subawardee, Enter Name, and Address of the Prime

Name: _____

Street: _____

City/State/ Zip _____

Congressional District (if known) _____

3.3.8 Federal Department/Agency:

3.3.9 Federal Program Name/Description:

CFDA Number, if applicable _____

3.3.10 Federal Action Number (if known) _____

3.3.11 Award Amount (if known) _____

3.3.12 (a.) Name and Address of Lobbying Registrant

10. (b.) Individuals Performing Services

3.3.13 Information requested through this form is authorized by Title 31 U.S.C. Section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Signature: _____

Print Name: _____ Title: _____

Telephone No: _____ Date: _____

INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action or a material change to a previous filing, pursuant to Title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a follow-up report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, State and zip code of the reporting entity. Include the Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or sub-award recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants, and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include the Congressional District, if known.
6. Enter the name of the federal agency making the award or loan commitment. Include at least one organizational level below the agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitations to Bid (ITB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Included prefixes, e.g., "RFP-DE-90-001."
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in items 4 or 5.
10.
 - a. Enter the full name, address, city, State, and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.
 - b. Enter the full names of the individual(s) performing services, and include full address if different from 10(a). Enter Last Name, First Name, and Middle Initial (MI).
11. The certifying official shall sign and date the form and print his/her name, title, and telephone number.

Attachment I
Cost Proposal Form

RFP 256-2025 HVAC Installation, Maintenance, and Repair Services

| Description | Straight Time Weekdays 7:00 a.m. – 5:00 p.m. | Overtime Weekdays 5:00 p.m. – 7:00 a.m., Weekends and Holidays |
|---|--|---|
| 11. Journeyman HVAC Mechanic | \$ <u>172.00</u> per hr. | \$ <u>258.00</u> per hr. |
| 12. HVAC Apprentice/ Helper | \$ <u>* N/A</u> per hr. | \$ <u>* N/A</u> per hr. |
| 13. Laborer | \$ <u>* N/A</u> per hr. | \$ <u>* N/A</u> per hr. |
| <p align="right">Markup Percentage:</p> <p>14. Materials % Markup: The District will not accept markup percentages in excess of 10% of the invoiced cost.</p> <p align="right"><u>10</u> %</p> | | |
| <p>* NOTE: Trane U.S. Inc. only hires qualified, self-sufficient Journeymen.</p> | | |

Trane U.S. Inc.

Company Name

25-0900465


FEIN

Joe Follenweider

Authorized Representative Name (Printed)

General Sales Manager, North Florida

Authorized Representative Title



Authorized Representative Signature

04/09/2024

Date