

HVAC Technician/Master Plumber
RFP# 2024-25-02
Putnam Valley Central School District

INVITATION For Request For Proposal (RFP)

REQUEST FOR PROPOSAL - PUTNAM VALLEY CENTRAL SCHOOL DISTRICT

HVAC Technician/Master Plumber RFP# 2024-25-02

PURPOSE OF THE RFP:

The Putnam Valley Central School District is requesting proposals from qualified individuals, to provide HVAC Technical Services and Plumbing needs for the Putnam Valley School District.

Contract Terms: July 1, 2025, through June 30, 2026

Contract may be extended for (4) additional one-year periods under identical terms and conditions upon mutual agreement of both parties.

Specifications and bid forms may be obtained from the Operations Office. For a copy of the bid, please go to <http://pvcsd.org/index.php/district/district-info/bids-rfp/> or call the Operations Office at (845) 526-7856. Vendors are requested to carefully review the Instructions to Bidders contained therein.

To be considered, the proposal must be received in the Business Office to the attention of David Spittal, Director of Operations, Putnam Valley Central School District no later than **2:00 pm on Wednesday, March 19, 2025**. The Business Office is located at 171 Oscawana Lake Road, Putnam Valley, NY 10579. The Board of Education reserves the right to reject any or all proposals submitted.

Note: The proposal shall contain the certification to non-collusive terms as set forth in section 103-d of the GML. This requirement must be strictly complied with.

During the selection process, the District reserves the right, where it may serve the District's best interest, to request additional information or clarification from firms/individuals submitting proposals, or to allow corrections of errors or omissions. At the discretion of the District, firms/individuals submitting proposals may be requested to make oral presentations as part of the evaluation process.

Dated: 2/19/25
Putnam Valley, NY 10579
By: David Spittal
Director of Operations

Putnam Valley Central School District

Request For Proposal HVAC Tech/ Master Plumber # 2024-25-02

Purpose of the RFP

This request for proposal is for selecting a qualified and experienced firm to perform HVAC Technical Services and Plumbing needs for the Putnam Valley School District.

Brief Description of the District

- Enrollment: 1,577 with 3 buildings (K-12)
- Number of Employees: approximately 300
- Schools:
PV Elementary School (Grades K-4); PV Middle School (Grades 5-8); PV High School(Grades 9-12)

Specific Responsibilities – Scope of Services

HVAC Technician Responsibilities:

- Repair, replace, or calibrate controls, thermostats, switches, fuses, and electrical wiring.
- Repair, replace, or calibrate components on natural gas and LP heating systems.
- Wire and connect motors, pumps, compressors, temperature controls, heating elements, and humidity controls as required.
- Provide proper refrigerant handling procedures according to federal EPA code
- Coordinates and schedules equipment and workflow for maximum efficiency
- Works with other departments, businesses, regulatory agencies, customers, and co-workers
- Accounts for department inventory and ensures preventative maintenance of equipment
- Provides training and instruction to team members as required
- Prepares and submits detailed reports and records for jobs completed
- Assists in the preparation of the department budget as it applies to HVAC
- Works on the project sites and gives advice and assistance to crew
- May operate heavy and or light equipment to include personnel lifts
- May be required to wear some type of respiratory protection in the performance of their duties
- OSHA 10 or 30 qualification preferred
- Carries out Master HVAC responsibilities in accordance with the district's policies and applicable laws.

Master Plumber Responsibilities:

- Maintains and repairs general plumbing components to include toilets, urinals, faucets, hose bibs, and drains.
- Installs, repairs, or replaces domestic hot and cold water lines.
- Repairs and replaces pneumatic steam valves, radiator valves, traps, and steam and condensate pipes.
- Repairs and replaces domestic hot water heat pumps, chilled water pumps, sump pumps, and sewage pumps.
- Installs, tests, and repairs all sizes of backflow prevention devices.

- Lead troubleshooting efforts and repairs on air, water, and gas distribution systems.
- Ensures proper care in the use and maintenance of equipment and supplies; promotes continuous improvement of workplace safety and environmental practices.
- Provides sketches and dimensions used by drafters to create plans for subcontractor work.
- Researches catalogs and vendor services for complex and/or customized system retrofits.
- Interprets and applies mechanical and structural blueprints to plan plumbing repairs and modifications.
- In coordination with management, assigns and tracks corrective and preventive maintenance tasks given to custodial staff.
- Performs miscellaneous job-related duties as assigned

Qualifications: (Certifications)

- Putnam County Lic. Master Plumber
- Putnam County Lic. Master HVAC
- Putnam County Lic Master Pump Installer “Well Pump”
- Refrigeration Recovery EPA Certification
- NYSDEC Registered Water Well Licence
- OSHA 10 Job Safety Certification
- NYS Cross Connection Lic. “Backflow Certification”

Minimum Qualifications: (Certifications)

- High school, GED, or comparable diploma, or completion of an equivalent technical or vocational program
- Drivers License
- Putnam County Lic. Master Plumber
- Putnam County Lic. Master HVAC
- Putnam County Lic Master Pump Installer “Well Pump”
- Refrigeration Recovery EPA Certification
- NYSDEC Registered Water Well Licence
- OSHA 10 Job Safety Certification
- NYS Cross Connection License “Backflow Certification”
- Significant (5 years minimum) experience in operating and maintaining geothermal HVAC systems

Essential knowledge, skills, and abilities.

- Installing, maintaining, and repairing ventilation and air conditioning systems and equipment.
- Identifying maintenance risks on equipment.
- Diagnosing electrical and mechanical faults for HVAC systems.
- Cleaning, adjusting, and repairing systems, and performing warranty services.
- Performing emergency repairs promptly and efficiently.
- Providing technical direction and on-the-job training.
- Keeping daily logs and records of all maintenance functions.
- Ensuring compliance with appliance standards and with Occupational Health and Safety Act.
- Complying with service standards, work instructions, and district requirements.

All duties to be performed will be under the immediate direction of the Director of Operations.

Inquiries

All inquiries concerning this RFP may be directed by email or facsimile to:

David Spittal, Director of Operations

F: (845) 528-7856

E: dspittal@pvcsd.org

If any firm wishes to receive copies of the inquiries and our response to them, they must provide to us at the email address listed above the email address to which they should be sent.

Requirements for Proposals:

All proposals must be received by the Putnam Valley School District Director of Operations no later than 2 pm on Wednesday, March 19, 2025. Any proposals received after this deadline will be returned unopened to the firm. Each firm shall submit one original proposal and 2 copies in a sealed envelope to the following address:

David Spittal, Director of Operations, Business Office
Putnam Valley Central School District
171 Oscawana Lake Road
Putnam Valley, NY 10579

The envelope shall be labeled "HVAC Tech/Plumbing Proposal".

All proposals and accompanying documentation become the property of the Putnam Valley CSD. The District shall not divulge any information presented in the RFP to anyone outside the District without the written approval of the proposer or firm making the proposal.

Proposal Information

1. The proposal should clearly state the fee to be charged to the District for HVAC Tech work and Plumbing services provided, based on performance, extended each subsequent year through June 30, 2030, for a maximum term of five years. The proposal should be a flat hourly rate over 52 weeks estimated at 2000 hours and include all necessary expenses. The District will allow for flexibility in the number of hours spent weekly working on the HVAC and plumbing needs.
2. A resume should be submitted with references.
3. A list of experience in the performance of the requested services.
4. Responses to this request for proposal should include an affirmation that there are no conflicts of interest between the firm and the Putnam Valley CSD.
5. Any proposal may be withdrawn or modified by a written request of the proposer, provided that such request is received by the Treasurer at the above email address or physical address prior to the date and time set for receipt of proposals.

Other Responsibility:

The contractor shall be held responsible for any damage to property, or for the injury to life or limb due to or caused by his work, or workmen, or the work of his subcontractors or their men, or which may be caused by the use of improper or unsound materials, which may occur during the progress of this work.

CONTRACTOR'S INSURANCE:

COPIES OF THE CONTRACTOR'S CERTIFICATES OF INSURANCE SHALL BE SUBMITTED TO THE SCHOOL DISTRICT WITH THEIR PROPOSAL SUBMISSION. CONTRACTOR ACKNOWLEDGES THAT FAILURE TO OBTAIN SUCH INSURANCE ON BEHALF OF THE PUTNAM VALLEY CENTRAL SCHOOL DISTRICT CONSTITUTES A MATERIAL BREACH OF CONTRACT AND SUBJECTS IT TO LIABILITY FOR DAMAGE INDEMNIFICATION AND ALL OTHER LEGAL REMEDIES AVAILABLE TO THE DISTRICT.

Contractor must provide thirty (30) days written notice of any cancellation.

General Conditions – Appendix A

INSURANCE:

The contractor shall purchase and maintain the insurances listed herein during the life of the contract. This insurance must be purchased from a New York licensed, A.M. Best Rated "A" or "A+" carrier. The owner, the architect (if applicable), his consultants (if applicable) shall, with the exception of Worker's Compensation and Employers Liability Insurance, be named additional insured.

As part of the RFP submission, the contractor shall submit the following:

1. A Certificate of General Liability Insurance coverage as required by these documents. The standard Accord form of certificate of insurance or insurance carrier certificate will be accepted for employer's liability and statutory State Disability. The box labeled "Certificate Holder" which is located at the bottom left-hand corner of the certificate must display the following address;

PUTNAM VALLEY Central School District
171 OSCAWANA LAKE ROAD
PUTNAM VALLEY, NY 10514

2. An Endorsement Indicating Additional Insured.

3. A Certificate of Worker's Compensation insurance coverage. The standard Accord form of certificate of insurance or insurance carrier certificate will be accepted.

4. An Insurance Certification form, which is to be completed by both the contractor and the contractor's insurance representative.

All Certificates of Insurance must be signed by a licensed agent or authorized representative of the insurance carrier. A Broker's signature is not acceptable.

The certificates shall be issued to the Owner with a provision that in the event the policies are either canceled or diminished, at least 30 days prior notice thereof shall be given to the Owner.

The successful contractor shall not commence work under this contract until they have obtained all insurance required under this section and the Owner has approved such insurances.

Further, the Contractor shall require all Subcontractors (if applicable) to carry similar insurance.

Coverages and limits of liability as set forth above and adjusted to the nature of the Subcontractor's operations and submit name to Owner for approval prior to start of any work.

In the event Contractor fails to obtain the required certificates of insurance from Subcontractors and a claim is made or suffered, the Contractor shall be responsible.

Coverages whether written on an occurrence or "claims made basis, shall be maintained without interruption from the date of commencement of the work until the date of final payment and termination of any coverage required to be maintained after final payment.

Contractor assumes all responsibility for the safety and keeping of all tools and equipment and any materials and products used to complete or perform the work. The contractor waives all rights against the owner, their employees, and agents for any loss or damage to any such tools, equipment, or any material or products used to complete or perform the work. The contractor shall require similar waivers in favor of the above-named parties from all Subcontractors, agents, and employees of any of them.

The insurance required by this Article shall be written for not less than the following, or greater if required by governing laws:

| | | |
|----|-------------------|------------------------------|
| 1. | General Liability | (Occurrence Form) |
| | \$2,000,000 | General Aggregate |
| | 1,000,000 | Products/Complete Operations |
| | 1,000,000 | Personal & Adv. Injury |
| | 1,000,000 | Occurrence |
| | 50,000 | Fire Damage |
| | 5,000 | Medical Expense |

Coverage to include Broad Form Property Damage, Contractual Liability, Independent Contractors, and Personal Injury. No exclusion for XCU or hazards shall be endorsed to the Policy.

| | |
|----|--|
| 2. | Auto Liability to cover all vehicles; or owned, hired, leased, and non owned vehicles. |
| | \$1,000,000 Combined Single Limit or |
| | 500,000 Bodily Injury (per person) |
| | 1,000,000 Bodily Injury (per accident) |
| | 500,000 Property Damage |
| | 5,000 Medical Payments |

| | |
|----|--|
| 3. | Excess Liability: Insurance is to cover all stated insurance coverages listed within this article: |
| | \$10,000,000 Each Occurrence |
| | 10,000,000 Aggregate |
| | 10,000 Retention (Maximum) |

| | |
|----|--------------------------------|
| 4. | Worker's Compensation: |
| | Statutory Part A |
| | Employees Liability Part B |
| | \$500,000 Each Accident |
| | 1,000,000 Disease Policy Limit |
| | 500,000 Disease Each Employee |

All limits carried in excess of the above amounts must be shown on the Certificate of Insurance, and all parties listed above must be added as additional insured for all limits so carried.

General Conditions – Appendix A

Coverages, regardless of policy form, shall be maintained without interruption from the date of commencement of the Work until the date of final payment and termination of any coverage required to be maintained after final payment.

HOLD HARMLESS: The awarded contractor will be required to sign a "Hold Harmless" Agreement with the School District as included with this document. Compliance with the foregoing requirement for insurance shall not relieve the Contractor from liability set forth under the Indemnity Agreement.

LAWS, ORDINANCES, CODES, ETC: The contractor shall comply with all laws, codes, rules, and regulations of the State, County, and City applicable to the work to be performed at the site.

PERMITS: Any and all permits lawfully required to prosecute the work and all approvals of work performed, required by authorities having jurisdiction, shall be obtained by the contractor who shall pay all lawful charges for same.

Workers shall be skilled in the trade in which employed and, where required, shall be licensed to perform the work by the authority having jurisdiction.

All work shall comply with codes, Local, State, and National of all authorities having jurisdiction, including but not limited to National Electric Code, Plumbing Codes, and OSHA regulations.

LABOR LAWS: Particular attention is directed to the Labor Laws of the State of New York applicable to the employment of labor at the site, which laws form part of this contract. The minimum hourly rate of wages to be paid for labor employed at the site is as determined by the Industrial Commissioner of the State of New York.

SAFETY/OSHA REQUIREMENTS

In order to assure the safety and health of workers, the contractor must provide safety training to all of its employees in accordance with OSHA standards and apply those standards to all work associated with this contract. The contractor must further provide its employees with appropriate **personal protective equipment** in all operations where there is an exposure to hazardous conditions or when the need warrants the use of such equipment to reduce hazards to the employees. The Putnam Valley School District has the right to request written safety plans from the contractor at any time.

The proposer must have all their employees go through OSHA 10 hour training course. With the RFP 1, you must supply the district with proof that each service technician/plumber has completed the OSHA 10 hour training course.

PREVAILING WAGE RATES:

1. There shall be paid each employee engaged in work of the project under this contract, for the trade of occupation listed, not less than the wage rate set forth by New York State.
2. In accordance with the State statutes, any person or corporation that willfully pays, after entering into this contract, less than this established wage schedule, shall be guilty of a misdemeanor and upon conviction shall be punished for such first offense by a fine of five hundred (\$500.00) dollars, or by imprisonment. A second offense carries heavier penalties.
3. Article 8, Section 220 of the Labor Law, as amended, provides among other things, that it shall be the duty of the fiscal officer to make a determination of the schedule of wages paid to all laborers, workmen, and mechanics employed on public works projects. The amount for supplements listed on the enclosed schedule does not necessarily include all types of prevailing supplements in the locality, and a future determination of the Industrial Commissioner may require the Contractor to provide additional supplements.
4. The Contractor shall provide statutory benefit for disability benefits, unemployment insurance, and social security.

EMPLOYEES:

The Contractor shall at all times enforce strict discipline and good order among his employees and shall not employ on the job any unfit person or anyone not skilled in the work covered by this contract. Employees are to cooperate with all interested parties in such a manner as not to interfere with or delay in any way the operation of the facility. The consumption of alcoholic beverages within the school building and/or anywhere else on the school property is prohibited.

PERMITS, LAWS, AND REGULATIONS:

The Contractor shall comply with all laws, ordinances, and rules and regulations which may govern the work as specified in this contract.

The Contractor shall secure and pay for any permits and licenses necessary for the execution of the work.

This agreement is limited. Applicable provisions of the New York State Obligations Law or other applicable statutes limit this agreement.

SPECIAL CONDITIONS

TERM OF CONTRACT: July 1, 2025 through June 30, 2026, with the option to renew this contract for a period not to exceed four (4) additional one (1) year periods at the prevailing wage.

SECURITY: Sections 20 and 21 of the General Conditions are waived. No security is required.

Board of Education Process

THE BOARD OF EDUCATION RESERVES THE RIGHT TO ACCEPT OR REJECT ANY OR ALL PROPOSALS OR ANY PARTS OF PROPOSALS. The original copy of all proposals received will be kept on file in the Administration Building.

March 19th through March 24th: consider all proposals, check references, (schedule to be determined), and prepare the recommendation to the Board of Education.

Criteria for Selection will include consideration of the following: (example)

Technical Score

- Experience -
- References-
- Certifications-

Cost Score

- Total Cost-

| Vendor Name | Technical Score | Cost Score | Total Score |
|-------------|-----------------|------------|-------------|
| | | | |
| | | | |

Right to Reject Proposals

This RFP does not commit the School District to award a contract, pay any cost incurred in the preparation of a proposal in response to this RFP, or to procure or contract for services. The School District intends to award a contract on the basis of the best interest and advantage to the School District, and reserves the right to accept or reject any or all proposals received as a result of this RFP, to negotiate with all qualified proposers, or to cancel this RFP in part or in its entirety, if it is in the best interest of the School District to do so. The School District may select as the successful proposer that proposal which, in the School District's sole discretion and with whatever modifications the School District and the proposer may mutually agree upon, best meets the School District's requirements whether or not that proposal is the lowest priced. No proposer shall have any legal, equitable, or contractual rights of any kind arising out of its submission of a proposal except as and to the extent that the School District, in its sole discretion, shall enter into a contract with the proposer that it selects as the successful vendor.

Appendix A
PUTNAM VALLEY CENTRAL SCHOOL DISTRICT

HOLD HARMLESS AGREEMENT

The undersigned hereby agrees to defend, indemnify, and save harmless the Putnam Valley Central School District from and against any and all liability, loss, damages, claims for bodily injury and/or property damages, cost, and expense, including counsel fees, to the extent permissible by law, that may occur or that may be alleged to have occurred in the course of the performance of this agreement by the contractor, whether such claims shall be made by an employee of the contractor or by a third party. The contractor covenants and agrees that he will pay all costs and expenses arising therefrom and in connection therewith, and if any judgment shall be rendered against the Owner, in any such litigation, the Contractor shall at this own expense satisfy and discharge the same.

By: _____
(Signature of Authorized Representative of Corporation)

Print Name & Title: _____

Company Name: _____

Date: _____

SUBMITTAL OF INVOICES

Contractor shall render invoices to the Putnam Valley School District in accordance with the accounts payable calendar attached by no less than 5 days before the Warrant date indicated. Invoices shall be on the standard form of the Contractor, including but not limited, showing company name, address, date, invoice #. Each invoice shall indicate a brief description of the work with a time period.

Appendix B-Proposal Certification
PART I - LUMP SUM BID PROPOSAL

- A. Preventive maintenance program covering all pneumatic and DDC Controls.
- B. Scheduled maintenance program covering all refrigeration & HVAC equipment, & temp controls.
- C. Plumbing maintenance and repairs.

Lump Sum Bid Proposal \$ _____
Dollar Amount

PART II

HOURLY RATE

1. \$ _____. ____ per hour

Based on past years' experience, and current conditions, the district estimates the # of service hours at 2000 hours to be increased annually upon renewal at the prevailing wage schedule provided.

Firm Name: _____

Date of Proposal: _____

Signature: _____

Printed Name: _____

Contractor Reference Sheet

Repair and Maintenance of
Pneumatic & DDC Controls, HVAC, and Refrigeration Equipment

1. Client: _____
Project Address: _____
Approximate \$ Value: _____
Date Started: _____ Completed: _____
Contact Name: _____ Telephone: _____

2. Client: _____
Project Address: _____
Approximate \$ Value: _____
Date Started: _____ Completed: _____
Contact Name: _____ Telephone: _____

RFP SUBMISSION REQUIREMENTS

Request for Proposal must include the following documents:

- 1) Resume', Appendix A, Appendix B, and reference sheet
- 3) If RFP is awarded, Certificates of Insurance including General Liability, Endorsement indicating Additional Insured and Workers Compensation as outlined in the above specifications.
- 4) Completed Hold Harmless Agreement
- 5) Proof of Certifications that each service technician has completed the OSHA 10 hour training course
- 6) Completed and signed proposal certification sheet.

Request for Proposal will be received until March 19, 2025 **by no later than 2:00 pm** at the District Office located at 171 Oscawana Lake Road, Putnam Valley NY 10579