

## **NOTICE**

**SCHOOL DISTRICT OF NEW GLARUS  
BOARD OF EDUCATION  
FACILITIES, TRANSPORTATION AND TECHNOLOGY COMMITTEE MEETING  
MONDAY, MARCH 7, 2016  
HIGH SCHOOL CONFERENCE ROOM  
6:00 PM**

## **AGENDA**

- I. CALL MEETING TO ORDER - PAUL EICHELKRAUT**
- II. HVAC BIDS**
- III. REFERENDUM UPDATE AND TIMELINE**
- IV. ADJOURN**

2

### **POSTED :**

NG HIGH SCHOOL  
NG MIDDLE SCHOOL  
NG ELEMENTARY SCHOOL  
NG POST OFFICE  
BANK OF NEW GLARUS  
UB&T BANK OF NEW GLARUS  
ANCHOR BANK OF NEW GLARUS

PURSUANT TO APPLICABLE LAW, NOTICE IS HEREBY GIVEN THAT A QUORUM OR A MAJORITY OF THE NEW GLARUS SCHOOL DISTRICT BOARD MEMBERS MAY ATTEND THIS MEETING. INFORMATION PRESENTED AT THIS MEETING MAY HELP FORM THE RATIONALE BEHIND FUTURE ACTIONS THAT MAY BE TAKEN BY THE NEW GLARUS SCHOOL DISTRICT BOARD.

# New Glarus Scorecard - Mechanical

Requests for Proposal  
3/4/16 Proposal Scoresheet

J.H. Findorff & Son Inc.

## COMPANY INFORMATION

## Company Ranking

Contractor	Volume (2015 Gross Revenues)	Largest Current Project on Books	2015 EMR	Bonding Capacity (per project)	Trade	Ability to Meet Project Schedule(Y/N)	Relevant Experience (Schools, Design/Build)	Familiarity with NGSD, JHF, PRA	Strength of Project Team	Project Approach	Safety	Capacity / Backlog	Fee / Budget	TOTAL	Notes
										<b>Possible Points</b>					
<b>HVAC</b>						Prereq.	10	10	10	10	10	5	10	<b>65</b>	
General Heating	71,000,000	38,000,000	0.56	\$150M	HVAC	Yes	8	8	8	5	10	5	8	<b>52</b>	
NAMI	80,000,000	7,600,000	0.67	\$40M/\$125M	HVAC	Yes	10	10	10	10	9	5	7	<b>61</b>	
H&H	43,000,000	13,840,000	0.82	\$15M/\$35M	HVAC	Yes	8	8	8	10	7	4	9	<b>54</b>	

# New Glarus Analysis - Mechanical

3/4/16 Proposal Analysis

NAMI				
Fee Assumptions		Units	Rate	Cost
Labor - SM	2,500	hrs	76.00	\$ 190,000
Labor - SF	2,500	hrs	79.00	\$ 197,500
Labor - Management	250	hrs	95.00	\$ 23,750
Labor - Accounting	75	hrs	64.00	\$ 4,800
Labor - Design	160	hrs	110.00	\$ 17,600
Materials	1	ls	110,000	\$ 110,000
Equipment	1	ls	75,000	\$ 75,000
Subcontract	1	ls	187,500	\$ 187,500
Subtotal				\$ 806,150
Mark-Up OH/Profit - Labor/Mtrl / Equip	6.5%			\$ 38,594
Mark-Up OH/Profit - Sub	3.5%			\$ 6,563
<b>TOTAL HYPOTHETICAL SCENARIO</b>				<b>\$ 851,306</b>

Actual Budget Provided \$ 930,000  
**Total: \$ 930,000**

**Notes:**

- \*Assumes same efficiency by contractor
- \*Assumes same purchasing savings
- \*Assumes same ability to provide value to design.

- \*Labor costs would vary by crew make-up est @ Journeyman Rate
- \*Example only, based on presumed % cost mix for diifferent areas of work

General Heating				
Fee Assumptions		Units	Rate	Cost
Labor - SM	2,500	hrs	77.81	\$ 194,525
Labor - SF	2,500	hrs	84.61	\$ 211,525
Labor - Management	250	hrs	85.00	\$ 21,250
Labor - Accounting	75	hrs	0.00	\$ -
Labor - Design	160	hrs	80.00	\$ 12,800
Materials	1	ls	110,000	\$ 110,000
Equipment	1	ls	75,000	\$ 75,000
Subcontract (Controls)	1	ls	187,500	\$ 187,500
Subtotal				\$ 812,600
Mark-Up OH/Profit - Labor/Mtrl / Equip	5%			\$ 29,553
Mark-Up OH/Profit - Sub	5%			\$ 9,375
<b>TOTAL HYPOTHETICAL SCENARIO</b>				<b>\$ 851,528</b>

Actual Budget Provided \$ 830,000  
**Total: \$ 830,000**

**Notes:**

- \*Assumes same efficiency by contractor
- \*Assumes same purchasing savings
- \*Assumes same ability to provide value to design.

- \*Labor costs would vary by crew make-up est @ Journeyman Rate
- \*Example only, based on presumed % cost mix for diifferent areas of work

H&H				
Fee Assumptions		Units	Rate	Cost
Labor - SM	2,500	hrs	75.67	\$ 189,175
Labor - SF	2,500	hrs	80.33	\$ 200,825
Labor - Management	250	hrs	90.00	\$ 22,500
Labor - Accounting (included)	75	hrs	0.00	\$ -
Labor - Design	160	hrs	90.00	\$ 14,400
Materials	1	ls	110,000	\$ 110,000
Equipment	1	ls	75,000	\$ 75,000
Subcontract	1	ls	187,500	\$ 187,500
Subtotal				\$ 799,400
Mark-Up OH/Profit - Labor/Mtrl / Equip	4%			\$ 56,050
Mark-Up OH/Profit - Sub	4%			\$ 7,500
<b>TOTAL HYPOTHETICAL SCENARIO</b>				<b>\$ 862,950</b>

Actual Budget Provided \$ 797,000  
**Total: \$ 797,000**

**Notes:**

- \*Assumes same efficiency by contractor
- \*Assumes same purchasing savings
- \*Assumes same ability to provide value to design.

- \*Labor costs would vary by crew make-up est @ Journeyman Rate
- \*Example only, based on presumed % cost mix for diifferent areas of work

**Summary:** Fees and hourly rates from all three subcontractors appear to be competitive based on an arbitrary calculation of hours. Budgets from all three subcontractors are based on many variables and assumptions at this early stage, and that is why we see variability. Findorff's recommendation is for NGSD to review all three HVAC proposals and make a selection based on the ability of the contractor to present value and efficiency to the project and to the District. Budgets, fees and hourly rates should not be major considerations for a selection.



# New Glarus School District Design Build Mechanical Systems Response to Request for Proposal

**March 3, 2016**

**Quality People. Building Solutions.<sup>SM</sup>**

4401 State Road 19 | Windsor, WI 53598



March 3, 2016



Mr. Ben Austin  
J.H. FINDORFF & SON INC.  
300 South Bedford Street  
Madison, WI 53703

**RE: Response to RFP  
For the New Glarus School District HVAC**

Dear Mr. Austin:

On behalf of NAMI, I would like to thank you for the opportunity to submit this proposal for the Design Build of Mechanical Systems for the New Glarus School District.

Since 1989, NAMI has been involved in over 200 school projects throughout Wisconsin, totaling more than 14 million square feet, valued at over \$240 million. Many of these projects have been HVAC renovations. A significant number of these projects have been executed using a negotiated design-assist or design-build process. With this focus on K-12 schools, **we have become the leader in providing the highest quality/best value HVAC construction to the Wisconsin education market.**

With the true professionalism and overall experience of our team, we will provide the high quality, energy efficient, long term HVAC solutions the School District is seeking.

As you go through our Response to the RFP and additional information regarding NAMI, I hope it will be clear to you that NAMI is uniquely qualified to exceed your expectations for these HVAC Renovation projects.

Please feel free to call me with any questions or comments concerning our proposal. Again, thank you for considering NAMI.

Sincerely,  
North American Mechanical, Inc.

A handwritten signature in black ink that reads "Shawn D. Steinhoff".

Shawn Steinhoff, P.E., LEED® AP  
Vice-President





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5. Service Department
6. The NAMI Difference
7. Scope & Budgets



**Quality People. Building Solutions.<sup>SM</sup>**

4401 State Road 19 | Windsor, WI 53598





1. Firm



Quality People. Building Solutions.<sup>SM</sup>

4401 State Road 19 | Windsor, WI 53598



# 1. Firm

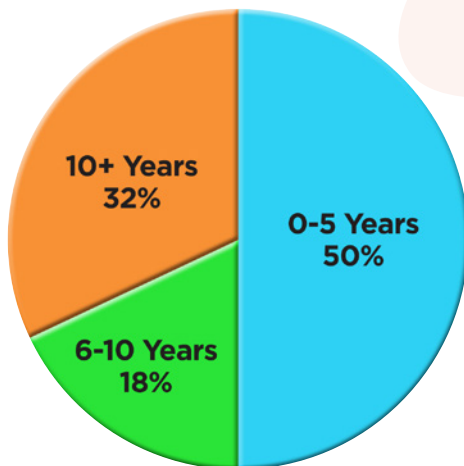


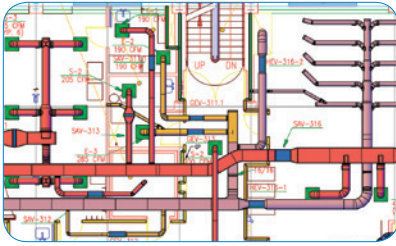
## NAMI is...

- **North American Mechanical, Inc.**, a full service mechanical contractor, active in building construction for the past 40 years.
- One of the Premier Mechanical Contractors in the State of Wisconsin with 2015 gross revenues of \$80 million.
- Financially secure with a bonding capacity of \$40 million per project and \$125 million aggregate. Our bond rate is \$6 per \$1,000.
- A great place to work. We have an experienced staff of nearly 300, all employees of NAMI. Our turnover rate is exceptionally low - 5% voluntary per year.
- A wholly owned subsidiary of Comfort Systems USA, a publicly owned, nationally recognized provider of mechanical systems and services with over \$1.4 billion in annual revenues. Through Comfort Systems, we also have access to an additional 4,500 skilled trade workers.



**NAMI Staff - Years of Service**





# 1. Firm



## NAMI Major Projects Under Construction

### AC by Marriott - Madison

Contract Amount: \$2,341,800  
Completion Date: August 2016

### Kalahari Resort - Phase II

Contract Amount: \$5,700,000  
Completion Date: March 2017

### Altoona Schools

Contract Amount: \$1,375,000  
Completion Date: August 2016

### Kettle Moraine High School

Contract Amount: \$1,582,000  
Completion Date: August 2016

### Bethany Skilled Nursing

Contract Amount: \$2,100,000  
Completion Date: January 2017

### Kettle Moraine Middle School

Contract Amount: \$1,496,000  
Completion Date: August 2016

### Edgewood Regina Hall Add & Remodel

Contract Amount: \$1,850,000  
Completion Date: August 2016

### Madison College Culinary Add/Renovation

Contract Amount: \$2,640,000  
Completion Date: August 2017

### Elizabeth Waters Hall Renovation

Contract Amount: \$3,950,000  
Completion Date: September 2016

### Monroe County Justice Center

Contract Amount: \$3,046,000  
Completion Date: September 2016

### Glenwood City School

Contract Amount: \$3,650,000  
Completion Date: August 2016

### Mt. Horeb High School HVAC Upgrades

Contract Amount: \$2,500,000  
Completion Date: August 2016

### Holy Name Heights

Contract Amount: \$3,600,000  
Completion Date: March 2016

### Park Hotel Renovation

Contract Amount: \$1,350,000  
Completion Date: June 2016

### Home 2 Suites by Hilton

Contract Amount: \$840,700  
Completion Date: January 2016

### Pine Valley Healthcare

Contract Amount: \$2,028,000  
Completion Date: February 2017

### Johnson Creek Middle School/High School

Contract Amount: \$2,000,000  
Completion Date: August 2016

### Randolph School District HVAC

Contract Amount: \$1,619,400  
Completion Date: August 2017



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### Ripon School

Contract Amount: \$3,000,000  
Completion Date: August 2016

### State Archive Preservation Facility

Contract Amount: \$7,600,000  
Completion Date: June 2017

### Stoughton Hospital ED Renovation

Contract Amount: \$1,400,000  
Completion Date: April 2017

### The James Apartments

Contract Amount: \$5,230,000  
Completion Date: June 2017

### Thrivent Data Center

Contract Amount: \$2,923,000  
Completion Date: April 2017

### UW LaCrosse Student Center

Contract Amount: \$5,700,000  
Completion Date: September 2016

### Wauaukee New Intermediate School

Contract Amount: \$3,110,000  
Completion Date: August 2016

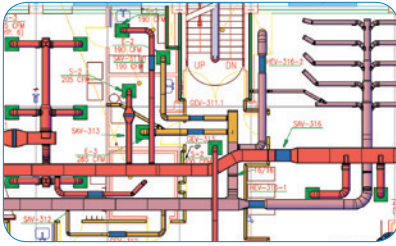
### Wisconsin Kenworth - Madison

Contract Amount: \$780,000  
Completion Date: March 2016

### WTC Coleman Center Phase II

Contract Amount: \$2,111,800  
Completion Date: July 2016





# 1. Firm



## Current Financial Statement

<b>COMFORT SYSTEMS USA, INC.</b>			
<b>CONSOLIDATED STATEMENTS OF OPERATIONS</b>			
<b>(In Thousands, Except Share Amounts)</b>			
	Year Ended December 31,		
	2015	2014	2013
REVENUE	\$ 1,580,519	\$ 1,410,795	\$ 1,357,272
COST OF SERVICES	1,262,390	1,161,024	1,117,389
Gross Profit	318,129	249,771	239,883
SELLING, GENERAL AND ADMINISTRATIVE EXPENSES	228,965	207,652	194,214
GOODWILL IMPAIRMENT	-	727	-
GAIN ON SALE OF ASSETS	(880)	(830)	(589)
Operating income (loss)	90,044	42,222	46,258
OTHER INCOME (EXPENSE)			
Interest income	72	18	23
Interest expense	(1,753)	(1,858)	(1,351)
Changes in the fair value of contingent earn-out obligations	225	(245)	1,646
Other	76	91	204
Other income (expense)	(1,380)	(1,994)	522
INCOME (LOSS) BEFORE INCOME TAXES	88,664	40,228	46,780
INCOME TAX EXPENSE (BENEFIT)	31,224	11,614	18,148
INCOME (LOSS) FROM CONTINUING OPERATIONS	57,440	28,614	28,632
Income (loss) from discontinued operations, net of income tax expense (benefit) of \$(119), \$212 and \$(2709)	-	(15)	(76)
NET INCOME (LOSS) INCLUDING NONCONTROLLING INTERESTS	57,440	28,599	28,556
Less: Net income (loss) attributable to noncontrolling interests	8,076	5,536	1,287
NET INCOME (LOSS) ATTRIBUTABLE TO COMFORT SYSTEMS USA, INC.	\$ 49,364	\$ 23,063	\$ 27,269
INCOME (LOSS) PER SHARE ATTRIBUTABLE TO COMFORT SYSTEMS USA, INC:			
Basic ---			
Income (loss) from continuing operations	\$ 1.32	\$ 0.61	\$ 0.73
Income (loss) from discontinued operations	-	-	-
Net income (loss)	\$ 1.32	\$ 0.61	\$ 0.73
Diluted ---			
Income (loss) from continuing operations	\$ 1.30	\$ 0.61	\$ 0.73
Income (loss) from discontinued operations	-	-	-
Net income (loss)	\$ 1.30	\$ 0.61	\$ 0.73
SHARES USED IN COMPUTING INCOME (LOSS) PER SHARE:			
Basic ---			
	37,442	37,547	37,245
Diluted ---			
	37,868	37,797	37,536
DIVIDENDS PER SHARE			
	\$ 0.250	\$ 0.225	\$ 0.210

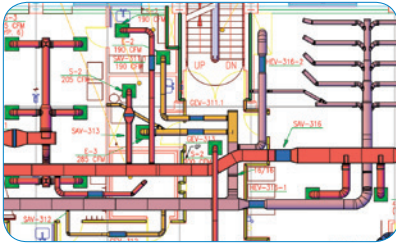


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## Current Financial Statement

<b>COMFORT SYSTEMS USA, INC.</b>			
<b>CONSOLIDATED BALANCE SHEETS</b>			
<b>ASSETS</b>	<b>(In Thousands, Except Share Amounts)</b>	<b>12/31/2015</b>	<b>12/31/2014</b>
<b>CURRENT ASSETS:</b>			
Cash and cash equivalents		\$ 56,464	\$ 32,064
Accounts receivable, less allowance for doubtful accounts of \$5,158 and \$4,379 respectively		302,052	303,575
Other receivables		20,642	15,520
Inventories		7,941	8,646
Prepaid expenses and other		5,836	6,168
Costs and estimated earnings in excess of billings		31,338	27,620
Assets related to discontinued operations			176
		<hr/>	<hr/>
Total current assets		424,273	393,769
PROPERTY AND EQUIPMENT, NET		60,813	55,759
GOODWILL		143,874	140,341
IDENTIFIABLE INTANGIBLE ASSETS, NET		41,079	45,666
OTHER NONCURRENT ASSETS		21,555	20,407
Total assets		<u>\$ 691,594</u>	<u>\$ 655,942</u>
 <b>LIABILITIES AND STOCKHOLDERS' EQUITY</b>			
<b>CURRENT LIABILITIES:</b>			
Current maturities of long-term debt		\$ 500	\$ -
Current maturities of long-term capital lease obligations		251	317
Accounts payable		106,684	106,211
Accrued compensation and benefits		54,079	44,683
Billings in excess of costs and estimated earnings		85,397	77,446
Accrued self-insurance expense		29,803	28,903
Other current liabilities		28,677	24,513
Liabilities related to discontinued operations		-	263
		<hr/>	<hr/>
		305,391	282,336
LONG-TERM DEBT, NET OF CURRENT MATURITIES		10,500	39,500
LONG-TERM CAPITAL LEASE OBLIGATIONS		256	529
DEFERRED INCOME TAX LIABILITIES		1,810	1,310
OTHER LONG-TERM LIABILITIES		8,632	10,874
Total liabilities		<hr/>	<hr/>
		326,589	334,549
<b>COMMITMENTS AND CONTINGENCIES</b>			
<b>STOCKHOLDERS' EQUITY:</b>			
Preferred stock, \$.01 par, 5,000,000 shares authorized, none issued and outstanding		-	-
Common stock, \$.01 par, 102,969,912 shares authorized, 41,123,365 and 41,123,365 shares issued, respectively		411	411
Treasury stock, at cost, 3,488,438 and 3,879,299 shares, respectively		(46,845)	(43,598)
Additional paid-in capital		323,765	320,084
Retained earnings (deficit)		69,390	29,384
Comfort Systems USA, Inc. stockholders' equity		<hr/>	<hr/>
		346,721	306,281
Noncontrolling interests		18,284	15,112
Total stockholders' equity		<hr/>	<hr/>
		365,005	321,393
Total liabilities and stockholders' equity		<u>\$ 691,594</u>	<u>\$ 655,942</u>



# 1. Firm



## Certificate of Insurance

<b>ACORD®</b>		<b>CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YYYY) 10/16/2015			
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p><b>IMPORTANT:</b> If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>							
<b>PRODUCER</b> Alliant Insurance Services, Inc. 333 Earle Ovington Blvd., Suite 700 Uniondale NY 11553		<b>CONTACT NAME:</b> PHONE (A/C, No. Ext): 516-414-8900      FAX (A/C, No.): 877-308-1070 E-MAIL ADDRESS: cscerts@alliant.com		<b>INSURER(S) AFFORDING COVERAGE</b> <b>NAIC #</b>			
<b>INSURED</b> North American Mechanical, Inc. 4401 State Road 19 Windsor, WI 53598		<b>INSURER A:</b> Travelers Property Casualty Co of A      25674 <b>INSURER B:</b> Phoenix Insurance Company      25623 <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>					
<p><b>COVERAGES</b>      <b>CERTIFICATE NUMBER:</b> 1299845119      <b>REVISION NUMBER:</b></p> <p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>							
INSR LTR	TYPE OF INSURANCE	ADOL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Contractual Liab GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO. JECT <input type="checkbox"/> LOC OTHER:	Y	Y	VTC2J-CO-828K6148-TIL-15	11/1/2015	11/1/2016	EACH OCCURRENCE \$2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$2,000,000 GENERAL AGGREGATE \$4,000,000 PRODUCTS - COM/PO/AGG \$4,000,000 \$
A	<input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	Y	Y	VTC2J-CAP-828K615A-TIL-15	11/1/2015	11/1/2016	COMBINED SINGLE LIMIT (Ea accident) \$2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$10,000	Y	Y	VTSMJ-CUP-828K674A-TIL-15	11/1/2015	11/1/2016	EACH OCCURRENCE \$10,000,000 AGGREGATE \$10,000,000 \$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> <input checked="" type="checkbox"/> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	1-VTC2NUB6A14334315 (AOS) 2-VTC2NUB6A14334315 (CA) VTRJ-UB-828K6161-15	11/1/2015	11/1/2016	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Evidence of Insurance.							
<b>CERTIFICATE HOLDER</b>  Sample Certificate 4401 State Road 19 Windsor WI 53598				<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 			
© 1988-2014 ACORD CORPORATION. All rights reserved.							
ACORD 25 (2014/01)		The ACORD name and logo are registered marks of ACORD					



# 1. Firm



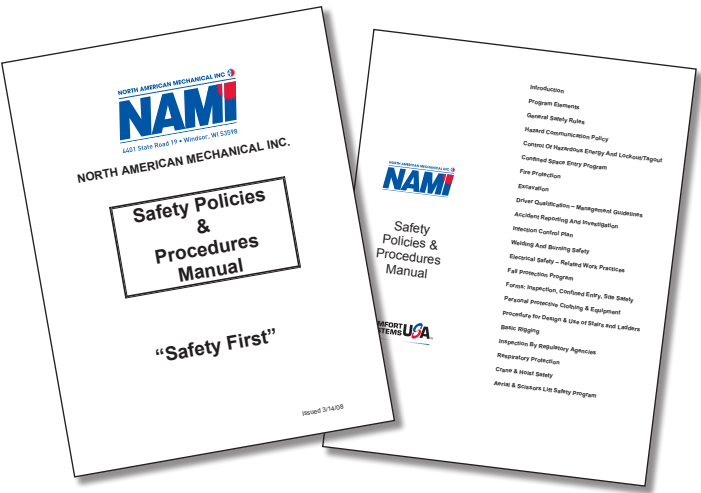
## NAMI Safety

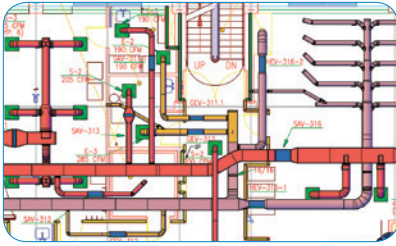
- NAMI maintains a complete health and safety program.
- Working safely is a critical part of our culture.
- **Every new NAMI employee goes through a new employee orientation program that includes extensive safety training.**
- Every NAMI employee who enters our Certified Apprenticeship Program completes the following safety training:
  - First Aid Training and Certification
  - CPR Training and Certification
  - OSHA 10 Hour Training
- All foremen complete a 30 hour construction-based OSHA training plus Construction Focus Four training
- We utilize a comprehensive Health & Safety Manual to guide our health and safety practices.



- We are consistently recognized by Comfort Systems USA, ABC and AGC for Outstanding Safety Performance.
- NAMI Experience Modification Rates (EMR) over the past 5 years have ranged between .52 and .67 – best in our industry.

***Twice in the past 6 years, we have achieved one million consecutive hours worked without a lost time incident!***





# 1. Firm



## NAMI Facilities

- NAMI’s headquarters and fabrication shops are located in a “state-of-the-art” facility in Windsor, WI.
- NAMI also has service offices located in Appleton and Eau Claire, WI.



- Our fabrication facility includes 90,000 square feet of automated shops, manned by over 50 full time skilled tradesmen, and capable of operating on two shifts per day, six days per week.
- We utilize “state-of-the-art” pre-fabrication technologies including plasma cutting, an automated sheet metal coil line, automated spiral duct fabrication and certified robotic welding.





## 2. Proposed Fee Structure





## 2. Proposed Fee Structure

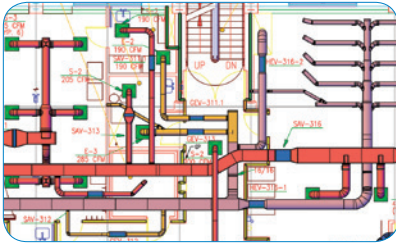


### NAMI Proposed Labor Rates

- **Proposed Composite Labor Rates for Shop and Field\*:**
  - Sheet Metal Composite Labor Rate: \$76.00
  - Pipefitting Composite Labor Rate: \$79.00

\*Labor rates are based on current Green County Prevailing Wage Rates and are based on a 40 hour work week; premium and overtime rates are not included.
  
- **Proposed Other Direct Labor Rates:**
  - Material Distribution Labor Rate: \$74.00
  - Service Labor Rate: \$98.00
  
- **Office / Project Management Proposed Labor Rates:**
  - Engineering: \$110.00
  - Project Management: \$95.00
  - PM Support: \$84.00
  - Purchasing: \$95.00
  - Estimating: \$95.00
  - CAD/BIM: \$96.00
  - Accounting: \$64.00
  - Safety Director: \$94.00
  
- **Proposed Fee/ Mark-up:**
  - Mark-up on self-performed work, materials and equipment: 6.5%
  - Mark-up on subcontract work: 3.5%





## 2. Proposed Fee Structure



- **General Conditions:**

1. Includes the costs associated with the installation, maintenance, dismantling and removal of materials, supplies, temporary facilities, machinery, and equipment required for the execution of this project.
2. Includes the costs for hand tools not customarily owned by the construction workers, which are provided by the Trade Contractor at the site and fully consumed in the performance of the work.
3. The costs for Trade Contractor owned equipment, other than small tools, shall be charged at the latest published A.E.D. rates.
4. The items above include, but are not limited to, items such as those listed below:
  - o Mobilization / De-mobilization
  - o Office Trailer
  - o Material Transportation
  - o Crane / Equipment Setting
  - o Lifts and lulls
  - o Large tools
  - o Communication cost
  - o Clean up / Debris Removal / Dumpsters
  - o Safety Related Cost
  - o Commissioning and Owner Training
  - o Operation and maintenance manuals
  - o As Built Drawings
  - o Final Cleaning





### 3. Personnel



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# 3. Personnel



## NAMI Team

NAMI is proposing senior level staff members to participate in this project. Key members are listed below:

- **Project Executive, Engineer**  
Shawn Steinhoff
- **Project Manager**  
Lucas Stando
- **Project Superintendent**  
Dan Pedek

Resumes for these key NAMI team members are included in the following pages.

## Sufficient Manpower

NAMI has sufficient manpower resources to completely satisfy the requirements of this project during construction. Please consider the following:

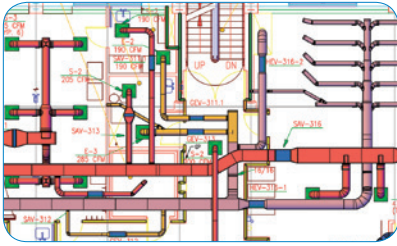
- Our field staff currently exceeds 180 skilled craftsmen, all in the direct employ of NAMI.
- We directly employ more than 50 workers in our pre-fabrication facilities.
- We have access to a labor pool of 1,500 skilled craftsmen through our parent company, Comfort Systems USA.

We are a successful mechanical contractor due in part to the care that we take in allocating our labor. NAMI...

- Forecasts labor needs on a weekly and monthly basis.
- Extends their labor forecasts out over extended periods of time (currently extends out 14 months).
- Commits labor to a project immediately upon award.
- Does not overcommit labor resources.

Our experienced employees are the key to our success. Each and every one shares the NAMI corporate values of:

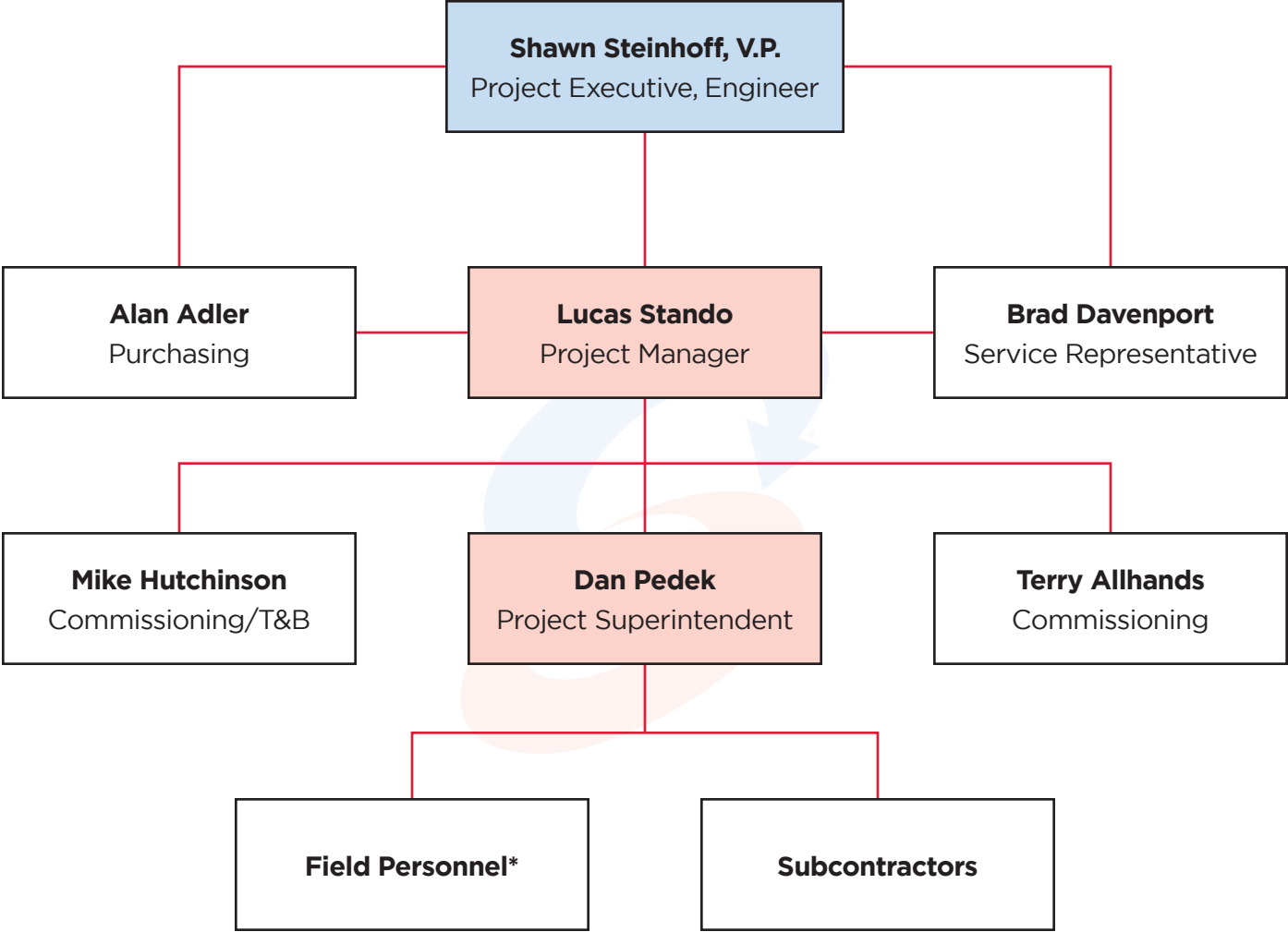
- Honesty and Integrity
- Respect for All Stakeholders
- Exceeding Customer Expectations
- Seeking Win-Win Solutions
- Communicating Openly
- Positively Impact Our Communities
- Providing Premier Safety Performance



# 3. Personnel



## NAMI Organizational Chart



\*Key field personnel will be chosen from a pool of foremen with extensive K-12 school HVAC renovation experience.



## 3. Personnel



### Shawn Steinhoff, PE, LEED® AP Project Executive, Engineer

Shawn has 30 years of experience in the HVAC industry, which includes seven years as a consulting engineer and 23 years of experience with NAMI. He is a registered Professional Engineer, a past chapter president and member of ASHRAE, a member of WASBO, a LEED® Accredited Professional, a member of the Wisconsin Green Building Alliance, and a member of the Wisconsin Geothermal Association.

Shawn's strength is design development, resulting from his varied experience in many aspects of HVAC contracting with NAMI and his consulting engineering background. Shawn's primary duties at NAMI involve design-build and design-assist projects - performing budgeting, engineering, offering value-engineering support, reviewing constructability, and providing scheduling input.

#### **Project Role**

Shawn would be an active participant in the design development and design processes of this project. He would manage the HVAC budget, offer input regarding alternative materials and methods of construction, advise on the effect of system design regarding constructability and schedule, and cost impact for all aspects of HVAC construction. Shawn would be responsible for overseeing the entire project from start to finish.

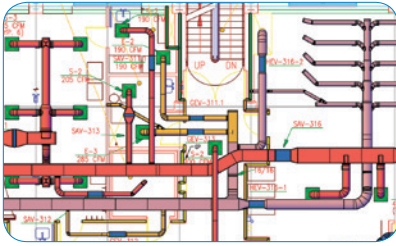
#### **Project Experience**

*The following is a partial list of K-12 projects for which Shawn has performed in a similar role*

- **Mt. Horeb High School**, Mt. Horeb, WI (design/build)  
HVAC Upgrades. NAMI is the prime contractor. \$2.5 million
- **Glenwood City School**, Glenwood City, WI (design/assist)  
HVAC renovation of a K-12 school. \$3.5 million
- **Kettle Moraine School District**, Wales, WI (design/assist)  
HVAC upgrades for six schools. \$8.1 million
- **Madison West H.S.**, Madison, WI (design/build)  
HVAC upgrades with geothermal system. \$4.2 million
- **Monona Grove School District**, Monona Grove, WI (design/build)  
HVAC upgrades in seven buildings. \$2.5 million
- **Fall River K-12 School HVAC Renovations**, Fall River, WI (design/build)  
HVAC upgrades. NAMI was the prime contractor. \$1.6 million
- **Edgerton Schools HVAC Renovations**, Edgerton, WI (design/build)  
HVAC upgrades. NAMI was the prime contractor. \$1.3 million
- **Watertown Schools Facility Upgrades**, Watertown, WI (design/assist)  
Retrofit of 7 schools with a variety of system modifications. \$3.5 million



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## 3. Personnel



### Shawn Steinhoff, PE, LEED® AP Project Executive, Engineer

#### Project Experience (cont.)

- **Brookfield Central High School**, Brookfield, WI (design/assist)  
Complete HVAC system replacement with hot and chilled water systems, ice storage, new Andover DDC for 293,000 SF existing and 30,000 SF new. \$5.6 million
- **Sun Prairie Upper Middle School Renovation**, Sun Prairie, WI (design/assist)  
HVAC renovation for a 280,000 SF school. \$4.5 million
- **Monona Grove Middle School**, Cottage Grove, WI (design/assist)  
New E.S. with a geo-thermal heat pump HVAC system. \$2.7 million
- **Fort Atkinson Schools**, Fort Atkinson, WI (design/assist)  
NAMI was the General Contractor for the retrofit of four schools with a geothermal heat pump system. \$9.5 million
- **Middleton-Cross Plains Area School District**, Middleton, WI (design/assist)  
Complete HVAC system replacement for two elementary schools, additions and remodeling for two elementary schools, and replacement of the HVAC central system for the district pool. \$3.2 million
- **Brodhead Elementary School**, Brodhead, WI (design/build)  
HVAC upgrade. NAMI was the prime contractor. \$1.2 million
- **Waunakee High School**, Waunakee, WI (design/build)  
Additions and extensive remodeling. \$3.3 million
- **Waunakee Intermediate and Heritage E.S.**, Waunakee, WI (design/build)  
HVAC upgrade. NAMI was the prime contractor. \$3.1 million
- **Middleton-Cross Plains Area High School**, Middleton, WI (design/assist)  
HVAC system renovations and remodeling. \$3.6 million
- **Monroe High and Middle Schools**, Monroe, WI (design/build)  
HVAC upgrade to both schools. \$3.5 million

#### References

- Matt Breunig – Findorff
- Dale Zabel, Kettle Moraine School District – Director of Facilities
- Dennis Pauli, Edgerton School District – Superintendent
- Tom Wohlleber, Middleton-Cross Plains Area School District – Assistant Superintendent of Business Services



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# 3. Personnel



### Lucas Stando - Project Manager

Lucas has been with NAMI since 2009 when he started in the field working summers and free days while attending college. During this period he gained a basic knowledge for how our HVAC systems mesh with the other trades through “hands on” experience. Lucas also completed an internship with NAMI in Project Management in 2011. This was a requirement to graduate from UW-Platteville. After graduating in 2012, Lucas assumed the role of a project manager and rapidly grew in the department as indicated by projects he has already managed.

#### Project Role

Duties will include processing schedules, correspondence, shop drawings, and construction bulletins. Lucas has the skills and experience to assure the success of this project.

#### Project Experience

- **Kalahari Resort and Convention Center**, Mount Pocono, PA  
\$8,775,000. 742,000 SF Hotel and Convention Center. This project included a large Family Entertainment Center, several kitchens, and a large lobby/registration area.
- **Promega Processing Center**, Fitchburg, WI  
\$2,350,500. 110,000 SF Medical Packaging and Warehouse Facility. This project included in-floor heat under large freezers to prevent frost from penetrating below the building foundations.
- **Promega GMP Building and Client Center**, Fitchburg, WI  
\$19,215,000. 306,000 SF Client Center, Laboratory, and Manufacturing Facility with FDA approved cleanrooms and a central utility plant.
- **Spectrum Brands**, Middleton, WI  
\$2,555,000. 220,000 SF Laboratory and Office fit out of newly constructed core and shell.
- **Promega Da Vinci**, Fitchburg, WI  
\$970,000.00. 25,000 SF Garage and Maintenance Facility.
- **Exact Sciences**, Madison, WI  
\$1,593,787. 29,000 SF Laboratory with Office Space fit out with minor demolition. NAMI was involved both the HVAC and Plumbing portions of this project.

#### Educational Background

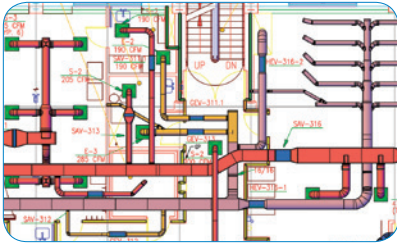
Bachelor of Science in Construction Management - UW-Platteville (2012)

#### References

- Hugh Schavier, Kalahari Resorts - Corporate Facilities Director
- Tony Buss, CG Schmidt - Project Manager
- Ross Kraemer, Kraemer Brothers - Vice President
- Tab Tabrizi, PE, Kraemer Brothers - Quality Assurance



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## 3. Personnel



### Dan Pedek – Project Superintendent

Dan has been with NAMI for over 16 years. Dan has worked in the mechanical construction industry since 1985. He is an experienced sheet metal installer and has been a project superintendent for the past 17 years. Dan's experiences have allowed him to have a vast knowledge of both sheet metal and piping systems.

#### Project Role

Dan's duties will include overseeing the daily on site construction activities, material ordering and daily coordination with other trades. Dan has the skills and experience to assure the success of this project.

#### Project Experience

- **Influenza Research Institute**, Madison, WI  
\$1,500,000. 30,800 SF 2-story lab with BSL 3 AG, BSL 3 and BSL 2 labs.
- **TDS/TEAM Data Center Phases 1 and 2**, Fitchburg, WI  
\$6,200,000 Total. 45,000 SF Tier III Data Center.
- **TDS/TEAM Data Center Phase 1**, Des Moines, IA  
\$4,325,000 Total. 25,000 SF Tier III Data Center.
- **UW Microbial Sciences Building**, Madison, WI  
\$13,500,000. 400,000 SF 6-stories of lab including vivarium and BSL3 labs.
- **URP/WPRC**, Madison, WI  
\$630,000. 21,600 SF 2-story BSL 3 lab suite.
- **UW Chemistry Phases 1 and 2**, Madison, WI  
\$5,725,000. 8-story new addition and remodel of lab.
- **Mirus Bio**, Madison, WI  
\$685,000. 19,200 SF laboratory remodel.
- **MATC Reedsburg**, Reedsburg, WI  
\$250,000. 15,000 SF addition and remodel of college building.

#### References

- Jeff Barutt, TDS
- Jim Corkery, ACS
- Dan Green, Henneman Engineering
- David Kemp, JP Cullen



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## 4. Subcontracting



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## 4. Subcontracting



### Work performed by NAMI:

1. Fabrication of ductwork.
2. Installation of ductwork.
3. Installation of piping.
4. Ductwork and piping insulation.
5. Testing & balancing.

### Subcontracted work:

1. Temperature controls provided by Masters Building Solutions, the company whose controls are currently installed in the District.

All work by NAMI would be managed by our Project Manager and internal NAMI personnel. Temperature controls also managed by NAMI's Project Manager.

Minimizing the number of subcontractors will allow us to provide superior coordination of the HVAC construction while minimizing the construction duration.



## 5. Service Department



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## 5. Service Department



### Size & Organization

- The NAMI Service Department offers preventative maintenance programs, troubleshooting and repair services, 24 hour emergency service and mechanical system retrofits for building owners and users throughout Wisconsin.
- NAMI Service currently employs 24 Field Service Technicians, 7 customer service reps, a project manager and various administrative support staff.
- Revenue from NAMI Service was approximately \$8 million in 2015.
- NAMI offers service from three locations in Wisconsin: Appleton, Eau Claire and Windsor (i.e. Dane County.)

**NAMI has consistently provided HVAC service for the New Glarus School District since 2014. As the District's mechanical partner, NAMI has assisted Mr. McGowan and Dr. Thayer in their efforts to improve building comfort, reliability, and efficiency. NAMI service also assisted NGSD with the planning and completion of the HS/MS Classroom Addition project in 2014 and the Mechanical/DDC Upgrade project in 2015. Mr. McGowan and Dr. Thayer can attest to the level of service - quality, timeliness & value - we have provided.**

### Owner Benefits

- The NAMI Service Department works closely with NAMI Construction during the close-out phase of construction projects via equipment start-ups and system commissioning. This provides NAMI Service with critically important information on the operation and maintenance needs of the Building Owner's mechanical systems.
- With this knowledge, NAMI Service will meet with new Building Owner to review the maintenance requirements of new mechanical systems. NAMI will then assist the Building Owner in setting up the appropriate maintenance program, by incorporating in-house capabilities of the Building Owner and offer supplemental services customized to meet the Owner's needs and budget requirements.
- NAMI Service also provides warranty services for mechanical systems installed by NAMI and has the detailed knowledge of these systems to most effectively provide troubleshooting and repair services.
- NAMI Service also has the tools and expertise to assist the Building Owner with a variety of energy related services including:
  - Energy verification via usage tracking, analysis and benchmarking
  - Energy conservation via analysis, implementation and training
  - Financial assistance via energy related incentives

## Service Maintenance Solutions

- Preventative Maintenance Programs
- Repair Service
- Troubleshooting and Diagnostic Services
- Retrofits and Remodeling Projects
- Building Automation Systems Service
- Energy Solutions
- Emergency Service – 24 hour / 365



### Preventative Maintenance Programs

- Customized Service Plans
- Full Coverage and Limited Coverage Options
- Technical Expertise
- Factory Trained
- Energy Smart Dashboard
- Reduce Operational Costs
- Capital Improvement and Budgeting

### Retrofit / Remodel

- Attention to Detail
- Single Point Responsibility
- Design and Build Solutions
- Professional Engineering
- Budgeting and Life Cycle Analysis
- Energy Retrofits

### Emergency Service

- Service Technicians Dispatched 24 hours / 365
- Offices Located in Windsor, WI, Appleton, WI and Eau Claire, WI



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## Energy Services

### Staff Resources

- LEED® Accredited
- U.S. Green Building Council (USGBC)

### Energy Related Services

- Energy Studies and Benchmarking For Existing Buildings
- Energy Usage Modeling For Proposed Buildings and Systems
- Energy Conservation Analyses and Implementation
- Building Monitoring and Control
- Energy Usage Tracking and Analysis
- System Verification
- Consultation On Energy Purchasing
- Energy Conservation Training
- Energy Smart Dashboard Energy Tracking System



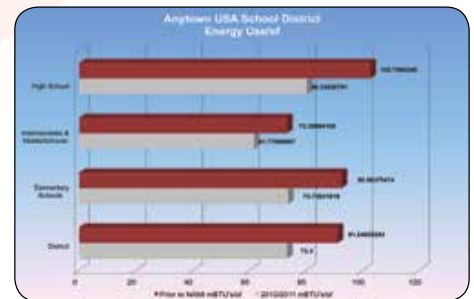
As a trade ally, **NAMI** has partnered with Focus on Energy of Wisconsin on numerous projects to provide customers with financial incentives to install energy efficient HVAC Systems and Equipment.

### System Verification

- Energy modeling prior to bringing new HVAC system on-line
- Utility bills are tracked for up to two years to verify system energy performance (compared to model)
- Reports provided throughout system verification process to track modeling versus actual (weather and rates normalized)

We are an ENERGY STAR Partner. ENERGY STAR is a joint program of the U.S. Environmental Protection Agency (EPA) and the U.S. Department of Energy (DOE) that advocates for the use of energy efficient products and practices. ENERGY STAR is also an innovative energy performance rating system for top performing buildings.

We also have additional resources available from Comfort System USA's Energy Services, a division dedicated to the identifying and implementing energy conservation strategies for our building customers.



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## 6. The NAMI Difference



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## 6. The NAMI Difference



### Why NAMI?

#### LOCAL INVOLVEMENT

- The project will be staffed with local sheet metal workers and steamfitters – people who will take exceptional pride in their involvement in this project and who will provide the very best in craftsmanship.

#### EXPERIENCE IN SCHOOL DESIGN & CONSTRUCTION

- Over \$240 million in school HVAC construction since 1990.
- Over \$130 million in negotiated school renovation projects.
- Five registered Engineers on staff – all with K-12 school design experience.
- Six experienced BIM/CAD Technicians on staff.

#### THERE FOR YOU NOW AND IN THE FUTURE

- NAMI is a financially stable company with 2015 revenues of \$80 million.
- NAMI is a subsidiary of Comfort Systems USA, with annual revenues over \$1.4 billion.

#### SOLUTIONS FOR ALL OF YOUR HVAC NEEDS

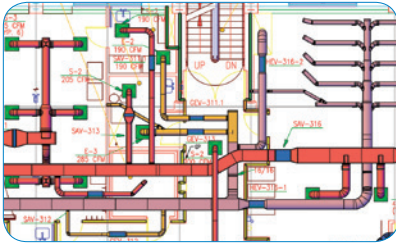
- HVAC and Plumbing Design, Prefabrication, & Installation.
- Commissioning & Training.
- Building Automation, Controls & Monitoring.
- Planned Maintenance & Service.

#### SYSTEM VERIFICATION & FOCUS ON ENERGY

- NAMI's Energy Specialist – 30 years providing energy solutions working for our customers.
- System Verification – a quarterly review of utility bills and system operation with facility management personnel during the warranty period.
- Focus on Energy partner. In the past three years NAMI assisted 97 customers in receiving incentives totaling \$401,135, with total lifecycle kWh savings of 9,395,858 and total lifecycle therm savings of 1,467,301.

#### A CULTURE OF SAFETY TO BENEFIT ALL PROJECT TEAM MEMBERS

- Safety milestones and records among the best in the industry.
- Two recent occurrences of over 1,000,000 man-hours worked without a lost time accident; most recent occurrence of **1,767,160** hours without a lost time accident.



## 6. The NAMI Difference



### COMMISSIONING & OWNER TRAINING

- A comprehensive process for commissioning all equipment and controls assures proper operation of the HVAC system from the beginning.
- Informal Owner Training during the commissioning process, and formal Owner Training afterwards will give you the knowledge to know how to operate the new systems.
- Additional Owner Training as needed, means the maintenance staff will have the training and support they need to properly operate the new HVAC systems.

### SERVICE SUPPORT THAT WILL ALWAYS BE THERE FOR YOU

- Comprehensive, Proactive Preventative Maintenance Programs and Emergency Service.
- Knowledgeable and caring Technicians available to help you to better operate and maintain your building, as well as repairing equipment.
- 24 service trucks available with primary and secondary technicians on call 24/7.
- We will continue to provide the high level of service that the District has come to expect of us.

### QUALITY + COST CONTROL = VALUE

- Un-matched construction efficiency.
- 100,000 SF State-Of-The-Art sheet metal and piping fabrication facility.
- Standardization of construction methods using quality materials.
- Superior buying power.
- Fully transparent pricing process.

### GUARANTEED RESULTS

- We have ***never*** exceeded a GMP on more than \$220 million in negotiated projects.

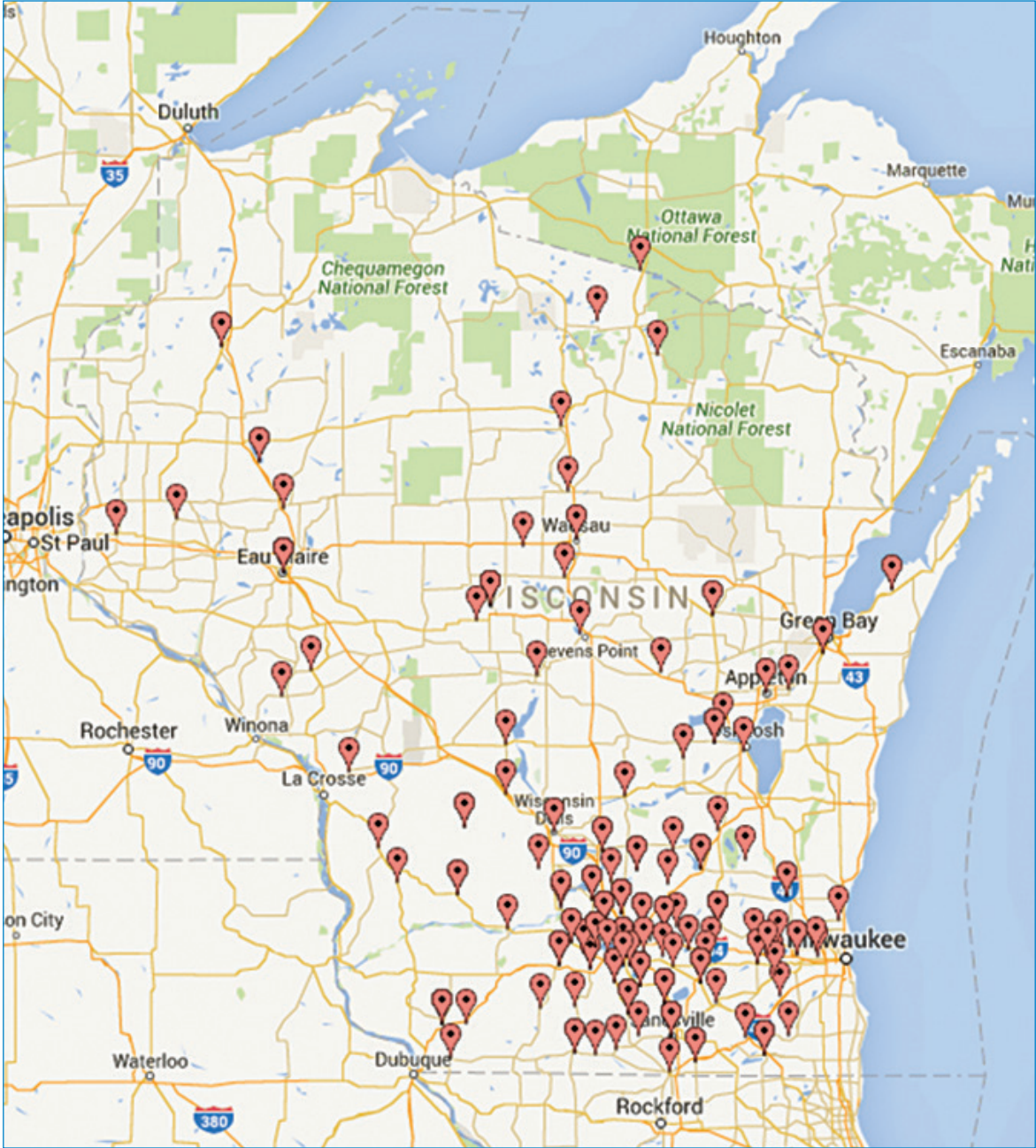


## 6. The NAMI Difference



### School Project Locations

Below is a map showing the locations of the many school projects we have built; many multiple projects in the same city.



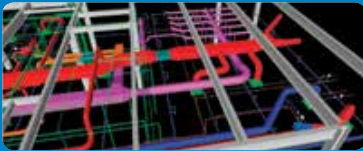
## HVAC Construction Solutions

### Staff Resources

- LEED® Accredited Management Team
- U.S. Green Building Council (USGBC)
- Wisconsin Green Building Alliance

### Markets Served

- Commercial / Retail
- Correctional Facilities
- Data Centers
- Healthcare
- High-Rise Residential
- Industrial
- Institutional
- Laboratory
- Manufacturing
- Office
- Restaurant / Food Service
- Schools / Universities
- Warehousing



### Construction

- Project Planning
- Integrated Project Delivery
- Engineering Design
- Building Information Modeling
- Sustainable Design Practices
- Lean Construction Methods
- Scheduling
- On-Site Management
- Installation
- System Testing

### Pre-Fabrication

- HVAC Ductwork and Piping Assemblies
- High Quality - Consistent and Precise
- Labor Efficient - Delivery On Time, Minimize Errors and Material Handling
- Cost Effective - Less Waste and Re-Work, Reduced Storage and Labor Required

### Quality Control

- Contract Review
- Kick-Off Meeting
- Pre-Construction Meeting
- Document Control
- Procurement and Expediting
- Coordination Drawings
- Shop Fabrication
- Construction Management
- Commissioning and Close-Out Procedures
- Warranty
- P.R.I.D.E. Program







## 7. Scope & Budgets



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## 7. Scope & Budgets



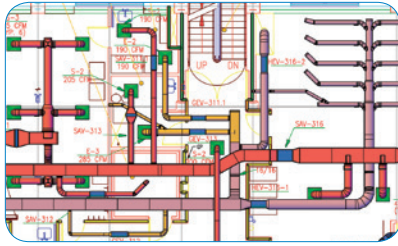
The proposed HVAC scope and budget associated with the RFP scope is outlined below.

### Elementary School

1. Replacement of Gymnasium Air Handling Units (two units)
  - a) Would replace just one of the units.
  - b) New AHU mounted on the back wall of the Stage; re-connect AHU to existing mixed air and supply air ductwork; DX cooling included.
  - c) The return air and outdoor air appear to mix below the Stage. New dampers with actuators would be installed in the return and outdoor air ductwork.
  - d) A VFD would be provided and CO2 monitoring would be included to allow for demand control ventilation and variable airflow to save energy.
  - e) The existing supply registers associated with the new AHU would be replaced with drum diffusers that would “throw” the air further into the Gym. The existing destratification fans would adequately mix & distribute the air throughout the Gym.
  - f) Controls integrated into existing Allerton control system.
2. Conversion of RTU-1 to VAV
  - a) The 20 existing booster coils would remain and 20 new VAV dampers would be installed.
  - b) VAV controls would be added to the RTU and for the VAV boxes.
  - c) Controls integrated into existing Allerton control system.
  - d) Based on a quantity of 20 zones and that new VAV dampers could be installed without having to remove/relocated the existing booster coils.
3. Conversion of RTU-2 to Demand Control Ventilation.
  - a) Controls as required for demand control ventilation would be installed.
  - b) Controls integrated into existing Allerton control system.
4. New Make-up Air (MAU) Unit at Kitchen

We do not recommend installing an MAU. The issue is that the Kitchen gets too hot. This is due to inadequate exhaust and a lack of make-up air. Installing an MAU with cooling would not be the most cost-effective solution and would not be the most energy efficient solution. This can best be addressed as follows:

  - a) The employee working in the Kitchen indicated that the recent repair of the exhaust fan for the dishwashing hood has helped the situation.
  - b) Install a heat removal hood over the convection oven with an associated exhaust fan.



## 7. Scope & Budgets



- c) Install a fan-powered VAV box, connected to RTU-2 that serve the Cafeteria, to provide a constant flow of conditioned air to the Kitchen.
- d) Fan-powered VAV controls integrated into existing Allerton control system.
5. Major Renovation Upgrades per PRA floor plans
  - a) A small RTU would provide ventilation, cooling & heating via ductwork in a soffit.
  - b) Hot water wall fin would be installed at the perimeter wall of Main Office 24, Principal's Office 26, and the corridor between the two rooms to provide heating. Each zone would be separately controlled.
6. Minor Renovation Upgrades per PRA floor plans  
No associated HVAC work included.

## High School/Middle School

1. New Make-up Air Unit at Kitchen

We do not recommend installing an MAU. The issue is that the Kitchen gets too hot. This is due to a lack of make-up air and not supplying any cool air directly to the Kitchen. Installing an MAU with cooling would not be the most cost-effective solution and would not be the most energy efficient solution. This can best be addressed as follows:

  - a) The exhaust airflow for the large kitchen hood needs to be re-evaluated. It appears to have more exhaust airflow than is required for the use of the hood. Equipment below the hood includes: one steamer, two warming ovens, two commercial ovens, and one 2-burner stove.
  - b) Install a fan-powered VAV box, connected to the supply ductwork for AHU-1, to provide a constant flow of conditioned air to the Kitchen. This AHU is already providing semi-conditioned make-up air for the kitchen hoods via air being transferred from the cafeteria and corridors. When the Middle School addition was built in 2014 approximately 4,600 cfm of air was disconnected from AHU-1 so there is plenty of capacity to provide supply air directly to the Kitchen.
  - c) Fan-powered VAV controls integrated into existing Allerton control system.
2. Replacement of Gymnasium Air Handling Unit

The current system is a fan coil unit with a DX coil and a duct furnace. This was definitely a low-end, least possible cost solution at the time. The equipment is in a location that makes it very difficult to service. An appropriate solution for a school would be as follows:

  - a) An electric cooling, gas heating RTU would be installed on the roof above the existing fan coil unit with supply and return ductwork from the RTU connected to the existing supply and return ductwork.
  - b) Controls integrated into existing Allerton control system.



## 7. Scope & Budgets



### 3. Installation of new AHU-1 and AHU-2

- a) The existing AHU's would be removed which would also require a fair amount of ductwork to be removed and re-installed.
- b) New AHU's of similar size and capacity would be installed.
- c) The new DX coils would be served by associated condensing units located on the roof that would utilize R-410a refrigerant.
- d) A VFD would be provided to control the supply fan for each AHU.
- e) Controls integrated into existing Allerton control system.

### 4. Replacement of Make-up Air Unit for Metals Shop

The current system is a gas unit heater with separate outdoor air and return air dampers. This was definitely a low-end, least possible cost solution at the time. An appropriate solution for a school would be as follows:

- a) Replace the gas unit heater, outdoor air damper, return air damper with a packaged make-up air unit.
- b) Controls integrated into existing Allerton control system.

### 5. New Art Room Kiln Hood

- a) Install a heat removal hood with associated ductwork and an exhaust fan.
- b) The exhaust fan would be locally-switched with a timer.

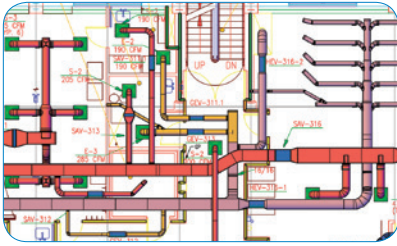
### 6. Major Renovation Upgrades

#### a) Office Area

- 1) Add one VAV box to serve the new Lounge and the two new Time Out rooms.
- 2) Rework the ductwork for the existing VAV-1-06 to just serve the new Work/Copy room.
- 3) Relocate existing ceiling diffusers in new ceiling grid for the Principal's Office.
- 4) VAV controls integrated into existing Allerton control system.

#### b) Science Area

- 1) Demolish the HVAC as required.
- 2) Relocate two existing VAV boxes.
- 3) Install two new VAV boxes.
- 4) Connect new fume hood in Chem Prep to an existing fume hood duct through the roof.
- 5) Provide venting for new chemical storage cabinets.
- 6) Install a new general exhaust for Chemistry 145 that would be switched locally with a timer.



## 7. Scope & Budgets



- 7) Install new exhaust for Chem Prep and Chem Storage.
- 8) Install new diffusers and grilles in new ceiling.
- 9) VAV controls, and Chem Prep and Chem Storage exhaust fan integrated into existing Allerton control system.

### 7. Minor Renovation Upgrades

No associated HVAC work included.

## HVAC Budget: \$920,000.00 – \$940,000.00

- Includes: Preparation and submission of state-approved HVAC plans, plan review fees, and HVAC construction permit. Also includes HVAC equipment, equipment needed to set the HVAC equipment, ductwork, hot water and gas piping, insulation, test & balance, and controls as required for a complete HVAC system.
- Does not include: sales tax on equipment and material, performance & payment bond, line voltage power wiring, and general construction.

# **GENERAL**

HEATING AND AIR CONDITIONING

## **NEW GLARUS SCHOOL DISTRICT REMODELING**



REQUEST FOR PROPOSAL

J.H. FINDORFF & SON, INC.

March 3, 2016

J.H. Findorff & Son, Inc  
300 S Bedford Street  
Madison, WI 53703

Attention: Mr. Austin

Re: New Glarus Schools HVAC Replacement

Thank you for the invitation to become a member of your construction team for the New Glarus Schools Renovation project. General Heating and Air Conditioning, Inc. is a full line mechanical contracting company installing HVAC systems in many types of facilities for over 65 years. Our firm has a large service department, providing 24-hour emergency service to our customers. Having a service department close by enables us to provide a high level of customer service during commissioning of the mechanical systems and during the warranty period.

Addressing your project specifically, we have substantial experience in HVAC systems for institutional and school facilities. In particular we have completed a number of HVAC upgrades very similar to those proposed. Special note is given to our successful design build and assist projects performed for many school districts in the past years. In this past summer alone we completed retrofit work for the Kickapoo, Riverdale, Richland Center, Elkhorn, Aldrige, and Wesby school districts. These projects are always fast paced in nature over a tight summer construction schedule. We are no strangers to the retrofit of AHU's and HW VAV systems as proposed. Our experience brings code knowledge, pricing and quality construction experience to the construction team.

We have qualified professional engineers on our staff to work closely with the construction team. Presently, we are providing similar design build/assist HVAC construction services at Epic Verona Campus, Meriter Hospital, Baldwin Area Hospital, Aldrige School District, and Muscoda School District, just to name a few. This project fits our work load extremely well because all these projects and our other projects are all well under way offering crews available for your project as well as our office professionals.

We look forward to the opportunity of becoming a member of your team for this important project. If you have any questions or need additional information, please don't hesitate to call.

Sincerely,  
**General Heating and Air Conditioning, Inc.**

*Brad M Werlein*

Brad M Werlein  
President

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# General at a Glance

## *Construction Sales Volume (in millions):*

2005 - \$21.6	2010 - \$52.0
2006 - \$32.3	2011 - \$60.0
2007 - \$39.1	2012 - \$65.0
2008 - \$41.0	2013 - \$70.0
2009 - \$48.0	2014 - \$71.1

## *Principals:*

President: Brad Werlein

Vice President: Rob Weise

*Bonding Capacity - \$150,000,000*

## *Bonding Rates:*

First	\$100,000	\$0.0100/\$1,000
Next	\$400,000	\$0.0080/\$1,000
Next	\$2,000,000	\$0.0070/\$1,000
Next	\$2,500,000	\$0.0060/\$1,000
Next	\$2,500,000	\$0.0050/\$1,000
Next	\$30,000,000	\$0.0045/\$1,000



# Company Profile

General Heating and Air Conditioning, Inc. is a wholly owned subsidiary of the Hooper Corporation. Our parent company, the Hooper Corporation, has been in business since 1913. General Heating was founded in 1946 and was incorporated in 1963. General Heating has been providing cutting-edge leadership in our area for more than sixty five years.

## *Our Philosophy of Business*

General Heating and Air Conditioning is guided by a simple philosophy that we put to work for all our customers:

**Do *whatever* it takes to do  
the job *right*.**

“Do” means that we are about action and results. “Whatever” means that we are always exploring new techniques, materials and approaches. “Whatever it takes,” means that we are absolutely committed to designing and installing the right system. It also means that we stand behind our work and offer comprehensive service in support of prior installations.

“Whatever it takes” demands the demonstration of an unwavering commitment from everyone at General Heating and Air Conditioning. We continually seek to upgrade our problem-solving techniques and skills through training and membership in local, state and national trade associations. Our certified technicians are the best in the business and are proud to be involved in setting the standards for our industry.

At General Heating and Air Conditioning we measure our success in terms of your satisfaction.



# Safety First

The safety mission of General Heating and Air Conditioning is to foster a culture of safety excellence throughout the organization. We will provide the necessary equipment, training, and guidance to ensure our employee's will meet and exceed all state and federal health and safety standards.



General employs two full-time, dedicated Safety Managers. Paul Leimer brings over 20 years of safety management expertise to our company. He has previously worked in corporate safety for a fortune 500 company and the construction industry. Mike Bales brings over 7 years of safety management expertise to General Heating and Air Conditioning. He has previously worked for a fortune 500 construction management company.

Highlights of the General Heating and Air Conditioning Safety Program include:

- **Jobsite Inspections:** Along with the Safety Managers, Project Managers and Foremen are trained in hazard identification and required to conduct regular site safety inspections to identify and correct safety concerns and ensure compliance with safety policies and procedures.
- **Policies and Procedures:** General has a comprehensive safety policy and procedure manual that fully explains our commitment to safety and covers all applicable safety and health standards in detail. All employees have received a copy of this manual for reference.
- **Job Safety Analysis:** Every crew is expected to complete a Daily Job Briefing (JSA) prior to starting work. We believe identifying potential hazards ahead of time allows our crews to safely manage job hazards.
- **Safety Standards and Regulations:** New employees undergo six hours of comprehensive safety training prior to beginning work. That training includes OSHA compliance subjects such as fall protection, aerial lifts, ladders, and a host of other topics to maintain the highest level of safety performance possible. Task specific safety training is then completed in the field. Also, all supervisors and project management are OSHA 10 hour trained.
- **Safety Department:** The Safety Managers will conduct weekly, documented site inspections with site supervision. Those inspections can be made available for our customers upon request.



EMR	
2015 -	.56
2014 -	.69
2013 -	.64
2012 -	.76
2011 -	.65
LWDIR	
2010-2015 -	0



Over **2,400,000**  
hours (and  
counting) without  
a lost time injury!

# Safety First, cont.

- Safety Committees: General Heating and Air Conditioning hosts several employee safety committees to provide an avenue for crew input on safety. Attendees include crew supervision, upper management, and project managers.
- Subcontractor Qualification: Each subcontractor we hire is evaluated based on key safety indicators including EMR, Incident Rate and DART. We will not hire subcontractors that do not meet the standards we set for our own team.
- Training Facility: The Safety Department utilizes a 5,000 square foot training facility to educate our employees on all facets of safety and health. This facility provides the optimal learning environment away from jobsite distractions.
- On-Line Safety Training: In 2011 General Heating implemented an online safety training program for all current employees and every new hire going forward. The program covers a wide variety of safety and health subjects.
- In 2015, to compliment General Heating and Air Conditioning's Traditional Safety Program, we implemented our Behavioral Based Safety Program to identify at-risk behaviors that may lead to the potential of injuries.
- Recognized with 2013 National Safety Excellence Award by Mechanical Contractors Association of America.
- 2010-2015 SMACNA Safety Excellence Award by Sheet Metal and Air Conditioning contractors National Association for contractors performing 300,000-400,000 hours of work.

General Heating routinely surveys all employees on the effectiveness and culture of the safety and health program. The results of this comprehensive survey are provided to all employees and management addresses any deficiencies that may be uncovered during the survey process. The survey routinely ranks company safety performance excellent!

At General, we take safety very seriously. The expectation is a zero accident culture that permeates everything we do. It is a worthwhile investment in our greatest asset, our people.



# Safety and Quality

## Safety

The health and safety of our employees is General Heating and Air Conditioning's #1 core value. Our General team of employees comprises field, management and corporate; and safety is the responsibility of every employee. Of our total number of employees, the field makes up 80%, management 15%, corporate 5%, and each group brings unique critical skills and knowledge to the team. Although our tasks, roles, and responsibilities may differ, our core values as a company are common and remain constant. For 60 years, success for our families, ourselves, and future generations has been the goal of General and requires a total team commitment to the General safety culture and the focus and belief of a zero accident/injury philosophy.

As part of our 2013 safety initiative, the General (GHAC) Safety Star was created as a representation of what is expected of every employee and the teamwork it requires.

Together we must practice leadership, commitment, communication, training, and accountability as the foundation of our safe work practices to be the best in the industry. A restructuring of our safety committees allowed for empowerment of workers in providing a voice in change and culture evolution.

General's Safety Department is composed of three full time safety professionals.

The mission focus of this team of experts is on injury and loss prevention through program and policy development, training, and site inspections. Safety Department qualifications include Master Degreed personnel, OSHA 500 trainers, NSC First Aid/CPR/AED instructors and nationally certified crane examiners (CIC - Crane Institute Certification).

Training has always been a cornerstone of a successful safety program. A state of the art dedicated training facility is located in Madison Wisconsin for up-to-date training needs. Training classes range from First Aid/CPR/AED and OSHA 10/30 Hour Classes to national crane certification through General's own nationally certified crane examiners. A Blended Learning approach has also been developed for many of the training curriculum topics, including orientation for new hires and subcontractors. General's new Learning Management System/Blended Learning creates a synergistic approach of face-to-face training with interactive computer instruction.





# Safety and Quality

General Heating and Air Conditioning has enjoyed a successful safety performance record on past projects. Specifically, the following RIR, LTIR, DART and EMR rates are provided below for five years:

Year	Total Hours	RIR	LTIR	DART	EMR
2009	371,764	3.22	0.53	1.07	0.74
2010	316,875	6.31	3.15	4.41	0.71
2011	353,736	5.08	0	0.56	0.65
2012	481,997	6.22	0	3.31	0.76
2013	492,527	2.42	0	0.81	0.64
2014	480,673	2.91	0	0.42	0.58

General has never received an OSHA citation.

## *Quality Control*

General Heating and Air Conditioning has implemented a Quality Control Program, which can be provided upon request. The backbone of our Quality Control Program is the buy-in we have with our superintendents, foremen, and tradesmen. The quality of our installations and craftsmanship are discussed frequently through the use of our Daily Job Briefings, Daily Construction Reports, and our weekly Tool Box Talks.

General also utilizes Rough-in and Finish Quality check lists at different stages of our installations as well as standardized system Test Reports. We recognize that there is value to us in cost and reputation by delivering a first class, quality project to serve the clients' intended purposes. One major advantage for General is our experienced manpower. Our low field employee turnover is self perpetuating and grows through apprenticeship, not temporary hires. Our foremen have been with General for an average of 15 years, with some passing the 30 year mark and our journeymen for an average of 7 years. Our crews have worked on many similar projects and they know what quality the client expects.

To assist in the quality control process, General utilizes the following Quality Control documentation:

Quality installations are also achieved through pre-fabrication



# Safety and Quality

of components in a controlled environment. All prefabrication is verified with the BIM coordination and is tested before it leaves the building. This also creates a smooth installation process knowing the rough-ins are accurate.

To assist in the quality control process, General utilizes the following Quality Control documentation:

- Daily Field Report
- Test Report
- QC Inspection Report
- Rough-in Checklist
- Systems Test Certificates
- Systems Equipment Service Schedules

General utilizes pre-fabrication as much as possible to standardize installations, reduce waste, reduce on-site labor, improve safety, and improve overall quality.

Finally, General will assign a project manager to this project to review quality on a regular basis. The project manager selected will have significant experience in healthcare construction and be able to work closely with the project design team up front to avoid potential quality problems that arise from constructability issues and code. This individual will also work with the foreman through our rough-in and finish checklists in an effort to achieve "Zero Punchlist". If there is a punchlist item, they are addressed immediately by the foreman on the project. This system of pre-inspections also occurs before the AHJs arrive to assure a passing report. In fact, of all the healthcare facility work General has completed, we have never failed a third party medical gas certification.



# Fee Development

General Heating and Air Conditioning has considerable experience working under Guaranteed Maximum Price (GMP) contracts. Our familiarity with these contracts allows us to understand how these projects should be managed and run.

All submitted costs are presented in monthly invoices that include complete documentation of the actual labor costs on Certified Payrolls (per individual labor hour) as well as all material and equipment cost. These billings are submitted under the AIA A111 cost-plus-a-fee format. This management approach enables us to comply with the "open book" style of AIA A111 contracting.

**Percent mark-up on self performed work is 5%**  
**Percent mark-up on materials and equipment is 5%**  
**Percent mark-up on bid or subcontracted work is 5%**

Labor is provided by our organization for sheet metal and steamfitter trades. Insulation, temperature controls and testing and balancing will be subcontracted.

General conditions and other reimbursable costs:

Principal in Charge - \$95 per hour  
Project Engineer - \$80 per hour  
BIM Technicians - \$70 per hour  
Estimator - \$70 per hour  
Project manager - \$85 per hour  
Field Operations - \$85 per hour  
Commissioning Manager - \$70 per hour  
Safety Manager - \$70 per hour

Per equipment reimbursable costs are based on MCAA rental rates.



# Labor Rates

General Heating and Air Conditioning is a union contractor with strong and long-standing relationships with our stable, skilled, and well-trained workforce. Our team includes experienced management and administrative personnel along with highly-skilled and experienced estimators and project management personnel.

All personnel associated with our company pride themselves on having active and open lines of communication with all clients and between all participants. Our field supervisor assembles the most effective team, including foreman, journeymen, and apprentices.

The teams working for General Heating and Air Conditioning work very hard to provide clients the best overall product upon completion. A successful project for us is one that is completed on time, within budget, and that performs as it was designed to work.



## STEAMFITTER LABOR RATE FIELD LABOR

	Per Hr
FOREMAN	\$90.89
JOURNEYMAN	\$84.61
5TH YEAR APPRENTICE	\$68.91
4TH YEAR APPRENTICE	\$62.63
3RD YEAR APPRENTICE	\$59.49
2ND YEAR APPRENTICE	\$49.78
1ST YEAR APPRENTICE	\$43.50

## SHEETMETAL LABOR RATE FIELD LABOR

	Per Hr
FOREMAN	\$81.26
JOURNEYMAN	\$77.81
5TH YEAR APPRENTICE	\$67.67
4TH YEAR APPRENTICE	\$60.90
3RD YEAR APPRENTICE	\$54.13
2ND YEAR APPRENTICE	\$47.37
1ST YEAR APPRENTICE	\$37.89

# Why General?

## *Budget Control*

In the Guaranteed Maximum Price (GMP) development phase of your project, we will follow many company standards to ensure that you receive a competitive price. We will review equipment and subcontract bid packages with the owner, engineer, and construction team to ensure that the proposed equipment includes the desired features, and will operate at optimal efficiencies. We will also call to action our experience with pre-planning major projects. We will take the lead on CAD coordination to assist other trades, as well as to facilitate our pre-fabrication efforts.

General Heating and Air Conditioning has a long resume of GMP design-assist projects that have documented savings that are returned to the owner. The owner will be involved with all selections of equipment and subcontractors through a competitive bid format.

Your estimate will be broken down into several categories to improve our budget control abilities. These categories, including labor by trade, materials, equipment, and subcontractors, will then be tracked by our sophisticated COINS accounting system. We will utilize short interval planning to gauge crew performance in the field. We track labor on a hourly "unit installed" basis to track actual labor productivity. This will help us monitor actual costs versus budgeted costs so we can catch overages and inefficiencies before they become a problem.

## *Solid Reputation*

Our well-earned and unblemished reputation for quality workmanship and successful project delivery have earned us the right to be considered one of the area's premier contractors. We are known to stand by our work for years after completion, and your project will be no exception.



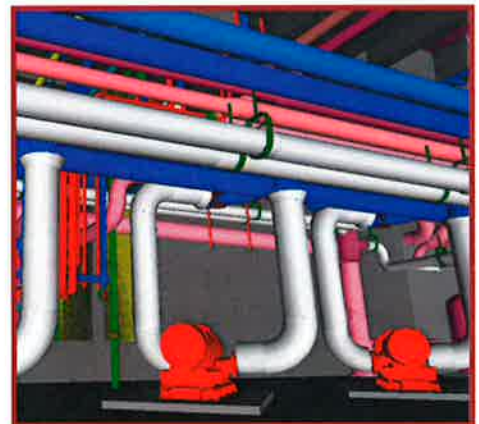
# Why General?

## *Design Phase Services*

No system is too large or too small for our experienced design professionals. Our firm has designed and built air conditioning systems for 200,000 square foot glass coating facilities, thermal ice storage systems, hospitals, health clinics, schools, offices, and food production facilities. Our state-of-the-art 3D piping and sheet metal CAD and BIM capabilities will give the construction team enhanced coordination capabilities.

Design phase services provided by General Heating and Air Conditioning include:

- Meeting with clients to determine their needs and objectives
- System type analysis and selection
- Budgeting system costs
- Cooling/Heating load calculations
- System equipment sizing
- Architectural coordination
- Ceiling space coordination
- Coordinate roof mounted equipment locations, weights, and openings
- AutoCAD coordination with other trades to avoid potential conflicts
- Preparation of construction documents
- 3D piping and sheet metal fabrication coordination



All shop drawings are checked by our in-house engineer, Carol Mori, to make sure they comply with plans and specifications. Additionally, we make sure we have correct fan rotation, motor size, coil connections, and sufficient maintenance space requirements.

A major component of our design phase service is our CAD department. Our department of fifteen has over 200 years of experience in the mechanical trades. This provides them with not only technical knowledge, but functional knowledge of building HVAC systems. Our CAD drawings download directly to our fabrication facilities, eliminating steps that could result in transfer error. Expediting this process ultimately saves the project time and money.

Our CAD department also utilizes FTP sites to ensure that the entire construction team has access to current mechanical plans and documents at all times. This allows for seamless communication between trades, which results in fewer conflicts and less rework.

# Why General?

## *Scope / Conceptual Estimating Ability and Techniques*

Beginning with the pre-construction phase, General Heating and Air Conditioning has the pieces in place to ensure that any project is a success. We are certain of this based on the level of experience we have attained building nearly every HVAC system, in nearly all building types. We have creative solutions to all sorts of problems. In choosing General Heating you can feel comfortable knowing that we can solve any HVAC concerns or requirements.

General Heating has considerable experience in developing GMP from schematic design drawings. We have both QuoteExpress and QuickPen digitized board estimating systems. QuoteExpress is a very fast and efficient state of the art estimating system. These tools provide a systematic and standardized approach to estimating.

In our conceptual estimating, we basically use three techniques in arriving at GMP. Historical cost data, including dollars per square foot for a similar building type is one way we are able to come to a ballpark type number. Going beyond that, we can take cost relationships between materials and equipment and our labor hours to achieve a slightly more accurate check number. Detailed takeoff from schematic design drawings is the most accurate way for us to estimate a project. Our engineers utilize their extensive design build experience to fill in any blanks with schematic drawings. This allows us to be more accurate than most with substantially less than complete drawings.

Our firm has provided GMP with a high degree of accuracy for the following significant projects:

- Alfalight
- BTC Promega
- Cardinal Glass Process Cooling
- Edgewood Library
- Epic Campus One
- Epic Campus Two
- Flad Office Building
- Fort Atkinson Hospital
- Gala Design
- Hazleton Labs - North addition
- Ho-Chunk Casino & Convention Center
- John Deere Dubuque Works
- Mentor
- Meriter Hospital
- Overture Center
- Physicians Plus, 1 South Park
- Powderject Vaccines
- Rhodia Thermal Ice Storage System
- Richland Center Hospital
- Sauk Prairie Memorial Hospital
- Stoughton Hospital
- Third Wave
- UW OR/PICU & Ambulatory Surgery
- UW West Side Clinic
- Wisconsin Institute of Discovery
- Epic Deep Space

# Why General?



## ***Sheet Metal Fabrication Facilities***

General Heating and Air Conditioning's sheet metal fabrication shop is a 24,000 square foot climate controlled work space.

Our shop is the largest in the area, giving us additional capacity to produce more of our own ductwork where we control the quality. Our shop strictly adheres to SMACNA construction standards, which ensures that the owner will receive a quality sheet metal installation. Our prefabrication procedures go the extra mile to ensure tight duct construction and expedited job site installation. Ducts are leak tested before they leave our shop to prevent air leakage and to decrease power requirements to move air through our ducts.

A small list of equipment available to us in our fabrication shop includes:

- Plasma duct automated duct-cutting machine (2)
- TDC roll formed duct flange machine
- Spiral round duct fabrication machine
- Automated corner connector system
- Fully automated 6 foot wide coil line (only one in the state)

## ***Pipe Fabrication Facilities***

Our sheet metal shop is complemented by our steamfitting fabrication facilities located at Pennsylvania Avenue and Vondron Road in Madison. With a total of 18,000 square feet, these shops are also our area's largest. Union steamfitters use standard and advanced welding technology that includes:

- Gas Tungsten Arc Welding (GTAW)
- Gas Metal Arc Welding (GMAW)
- Shielded Metal Arc Welding (SMAW)
- Orbital Welding

We have access to over 95 qualified welding procedures through our membership with the National Certified Welding Bureau enabling us to fabricate pipe with a wide variety of materials. Our shop carries four stamps in compliance with A.S.M.E. code for work on pressurized vessels. Utilizing state of the art materials and equipment, the pipe fabrication shop improves our efficiency and productivity on projects of all sizes.

The combined capacity of our fabrication shops, coupled with our experienced labor force, give us the productivity edge in this market.

# Why General?

## *Maintaining Schedule*

Establishing and maintaining an ambitious, yet realistic, project schedule is critical to everyone on the project team, especially the building owner. Utilizing Primavera, we are able to create and coordinate schedules with other trades in real time. By developing an accurate and realistic schedule from the beginning of the project, General Heating and Air Conditioning is able to deliver projects that consistently meet schedule requirements.

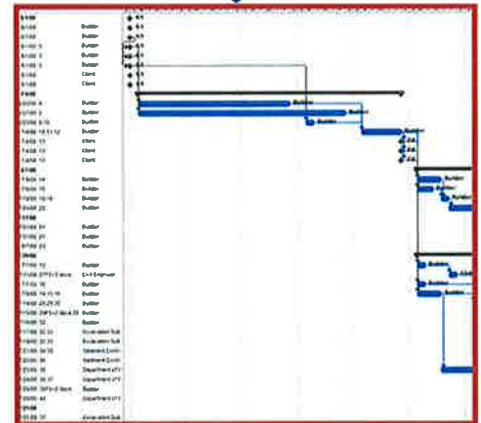
Being one of the largest HVAC contractors in the Madison area, General Heating has the resources available to us to ensure that when required, we can bring more staffing resources to the job in order to keep pace with the construction team. We also have the experience in this area to know when inefficiencies are developing, and we're able to catch these problems before they arise.

## *Quality Assurance*

At General Heating and Air Conditioning we know how important it is to complete high quality work in a safe, efficient and cost-effective manner. Our commitment to quality starts at the very top and permeates all levels throughout our entire organization.

Our commitment to quality begins with our commitment to thorough planning and is reflected in the preparation of construction documents that create quality from the beginning of every project.

Efficient project management and administrative systems help to ensure quality performance on each and every project. General Heating follows the most stringent construction specifications both in the field and in our sheet metal and pipe fabrication facilities. Every customer knows that our commitment to quality will be evident in the design and installation of quality heating, cooling, and ventilating air comfort systems.



# Why General?

## *Material and Equipment Handling*

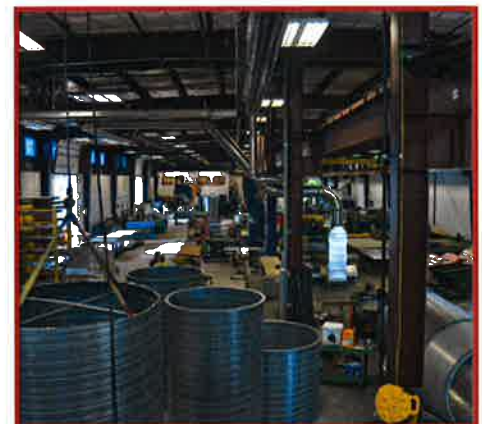
Ductwork and pipe contamination are serious issues in the construction industry today. Contaminates lead to dust, mold, and other hazardous materials that reduce indoor air quality. Our ductwork and pipe are produced and stored in covered facilities, capped on both ends, and handled with the utmost care. When the building site does not have adequate or sufficient storage facilities, we will not deliver the ductwork until it is ready to be installed. This practice prevents many problems caused by having a pile of ductwork or pipe covered in mud.

Our 20,000 square foot warehouse, in addition to the area's largest fabrication shops, gives us a place to store your heating and air conditioning equipment prior to installation. Keeping this equipment out of the weather significantly reduces warranty issues and system problems down the road.

## *Managing Material Cost Escalation*

Through careful planning and design we are able to provide certainty that your project will be installed exactly as it was designed. This practice minimizes material cost escalation while simultaneously reducing the risks associated with other approaches to contracting.

At General Heating, when we have developed a set of construction documents, we then call upon our strong financial background and excellent relationships with local suppliers to receive the best pricing in the area. At that time we can utilize our massive climate controlled storage to receive pre-purchased pipe, coil stock and other materials and equipment. With accurate knowledge of material costs, we are able to develop a reliable budget early on and keep those figures in balance through to the end of the project.



# Commissioning and Service

## *Service*

General Heating and Air Conditioning has been in the HVAC service industry for six decades. Our service organization is recognized as the largest and most respected in our area. Presently, we have 13 well-trained service technicians. We pride ourselves in being able to offer 24-hour service that's only a phone call away.

We operate out of a central location with our technicians and staff serving all corners of our regional service region. When clients contact our service department for a warranty or service issue, responding to those calls becomes the top priority for our next available technician. We typically respond to all calls by having a technician at the building site within two hours, frequently with less elapsed time.

The service department benefits our project during the start-up and warranty phase. We have many technicians so we are typically able to respond to warranty issues within a couple hours.

## *Commissioning*

Our focus on service has created a solid reputation for excellence within our region. At GHAC, we take on a leadership role in building commissioning. Our team of a full-time Commissioning Manager, in addition to our service technicians and engineers, provides the framework for us to verify and document that equipment and systems are functioning as per their intended design. As a quality management process, commissioning goes beyond traditional testing, adjusting and balancing.

The benefits of GHAC's commissioning services may include:

- Faster project completion
- Reduced maintenance costs
- Reduced operating energy costs
- Improved performance
- Capacity enhancements
- Improved occupant comfort
- Superior operation and maintenance documentation and training

Before we start a new service relationship, we provide three copies of operation and maintenance manuals for all equipment in your project. Our service professionals will thoroughly explain the workings of the entire system to your maintenance staff. These training sessions will take you through the various components and their maintenance requirements. These sessions will be recorded and you will receive DVD's for future reference. Once hired, we always stand ready, willing and able to help the building staff with any issues, problems, or opportunities that arise.

# Experience with Project Team

Company wide, more of our annual volume is with Findorff than with any other general contractor. We have performed projects valued as low as a few hundred dollars all the way up to tens of millions of dollars. The trusting relationship we have with your team will go a long way to resolving, or more likely avoiding, potential conflicts during the project.

We understand the requirements of this type of project and we feel we can contribute very strongly to the project team.



# Construction Backlog

Our industry is highly competitive, and those who demonstrate excellence in project management have a distinct advantage. At General Heating and Air Conditioning, we focus our attention on meeting the requirements of every project and every deadline. We are always looking at our upcoming work and making adjustments to keep from becoming overextended. Fortunately, we have the resources to simultaneously manage multiple large projects and ensure that all expectations are met. We carefully manage our resources and workload to ensure that we achieve the right balance to meet the needs of all of our clients.

We take our work seriously at General Heating and Air Conditioning. We know that our established record of effective project management contributes to the bottom lines of our clients.

Our reputation has been built slowly and carefully, one project at a time. When we make commitments, we back them up with performance. That's the right way to do business. That's the way it works at General Heating and Air Conditioning.



## WORK UNDER CONTRACT JOBS OVER \$500,000 SEPTEMBER 2015

Job Name	Contract Amount	Percent Complete	Completion Date
PPD BUILDINGS	\$1,164,000	20%	2015
RIVERDALE HIGH SCHOOL	\$1,045,000	75%	2015
MERITER PROJECTS	\$910,000	45%	2016/2015
EPIC CAMPUS 4	\$35,000,000	30%	2016
DANE CTY MED. EXAM	\$4,100,000	15%	2016
BALDWIN HOSPITAL	\$4,313,000	20%	2016
EPIC CAMPUS 5	\$38,000,000	5%	2016
ATC EXPANSION	\$4,040,000	0%	2016
AMERICAN FAMILY	\$550,000	35%	2011
UW O.R. RENOVATION	\$3,030,000	50%	2016

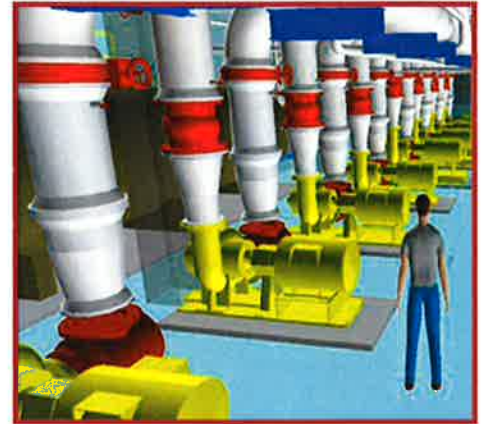
# Immediate Capacity

Our firm is well suited to assist with design, planning, budgeting, and procuring materials immediately upon subcontract award. Our staff includes five estimators, four Professional Engineers and Designers and a strong contingent of project managers to help with all phases of the project.

We have four other school projects we feel will be under contract for the Spring of 2016 until Spring of 2017. The total amount of work on our books is well within our capabilities for the duration of this project. For more project specific info see the Backlog Page.



# Design Build



For nearly 30 years, the vast majority of projects General Heating and Air Conditioning has completed have either been Design-Assist or Design-Build in nature. We are frequently able to call upon our years of experience in both designing and installing quality HVAC systems for cost saving solutions. By staying ahead of the curve on new design technologies, General is able to contribute to the most prepared project delivery teams.

On recent projects General has frequently taken the lead or contributed from the beginning on projects incorporating Building Information Modeling (BIM).

- Using BIM as a design and construction tool, General has seen increased customer value by eliminating waste, reducing changes during the construction phase, and creating more useful building documents upon turnover.
- By utilizing BIM, General has demonstrated our ability to be a leader on a project delivery team with our skilled design professionals and installers.
- Successful Design-Assist projects require everyone on the project team to take an active role in all phases of the construction process. From the earliest stages of a project, we incorporate everyone, from design engineers to our field supervisors, to ensure that all of our bases are covered.
- Our engineers utilize their many years of experience to create coordination documents that are thorough and effective.
- Our highly trained BIM department works hand-in-hand with our trade foremen to take on the task of coordinating our construction documents with those of other trades.

Once documents have passed the many stages of clash detection and resolution, project managers and foremen develop well researched and accurate schedules. We have an honest and straight-forward approach to scheduling. We see this as crucial from the very beginning, since no one benefits when promised schedules cannot be attained.

While constructing coordination drawings and developing schedules, we are in constant communication with all members of the project delivery team. We have frequently hosted FTP sites for projects we are a part of in order to ensure that all members of the team have the most current and up-to-date information.

By performing a contract as a Design-Assist contractor, we feel that we are in a position to execute a well-run, high-performing job. By reducing waste and eliminating unnecessary changes, the project at hand can be successful for all parties involved.

At General, we work in partnership with our clients to deliver all projects in a timely and cost-effective manner. We take our work seriously and work very hard to exceed all established requirements and expectations.

# Disruption Prevention

Communication is a key to any successful project, especially when it involves customers that are not intimately involved with the day to day construction process. Our team will have a strong understanding of the work in front of us, as well as how it will impact the users in the space. By accurately planning our work, we are able to communicate to the project team and the occupants well in advance of any disruption.

When our work poses a hazard to others, whether it be noise, dust, or hot work, we will take every precaution available to ensure occupants are not in harms way.

Our staff works in occupied spaces nearly every day and we are very aware that our work can disrupt their day to day operations. Often times we will shift our work to odd hours to better accomodate the users. We are careful to work around personal and business property with a focus on preventing spaces from ever getting dirty rather than cleaning up a big mess when we're done.



# Subcontractor Selection

Temperature controls are one of the key subcontractors on any project related to HVAC. Building Managers need to interface with the temperature control system almost every day, long after construction and the warranty period are over.

Our first step to securing a trusted controls contractor would be to discuss the options with the Owner and building staff. Things like past history, system knowledge and system complexity all factor in to the priorities requested by the Owner. Through this process we are usually able to narrow the list of contractors down to two or three.

From the short list of potential candidates, we will solicit budget prices from contractors using as much specific design information as possible. We will review scope documents internally and with input from engineers and the project team, we will make a recommendation to the Owner.

If everyone agrees on a trusted partner, we should typically be able to have the selected contractor on board within a few weeks of the initial meeting with the Owner.

Temperature Controls, Insulating, and Test and Balancing are all subcontracted scopes of work.



# Project References

An organization's reputation is earned and evaluated every day, through every project. At General Heating and Air Conditioning, we are proud of the reputation for quality and excellence that we have earned. We value the strength of the personal and professional relationships that we have with the organizations and businesses we have worked with over the years.

The references listed below know who we are, how we work, and what we are able to accomplish in widely diverse settings. These individuals will all speak to the quality of the workmanship that is performed every day by General Heating and Air Conditioning.

Gerard J. Rabas, P.E.  
Engineering Services  
Meriter Hospital  
309 South Park Street  
Madison, WI 53715  
608-267-6376

John Nelson  
Civil and Environmental Engineering  
University of Wisconsin  
1415 Engineering Drive  
Madison, WI 53706  
(608) 843-5976

Simon Greenstreet  
Facility Manager  
Catalent Pharma Solutions, LLC  
PO Box 620160  
Middleton, WI 53562  
(608) 821-6270

Andrew Howick  
Director Facilities Planning  
UW Hospital & Clinics  
600 Highland Avenue  
Madison, WI 53792-8360  
608-263-9160

John Flad  
President  
Flad Development  
7941 Tree Lane - Suite 105  
Madison, WI 53717  
608-833-8100

Steve Kreuzer  
Scientific Protein Labs  
700 E. Main Street  
Waunakee, WI 53597  
(608) 849-5944

Al Meyer  
Plant Engineering Department  
UW Hospital & Clinics  
600 Highland Avenue  
Madison, WI 53792-8360  
608-263-5153

Paul Blair  
Plant Engineering Dept. Head  
General Casualty Insurance Comp.  
1 General Drive  
Sun Prairie, WI 53596  
608-837-4440

Clinton Collins  
Facilities Manager  
Subzero Group  
2866 Basswood Drive  
Fitchburg, WI 53719  
(608) 270-3344

Bob Brandherm  
Director of Facilities  
Epic Systems Corporation  
1979 Milky Way  
Verona, WI 53593  
608-410-7984

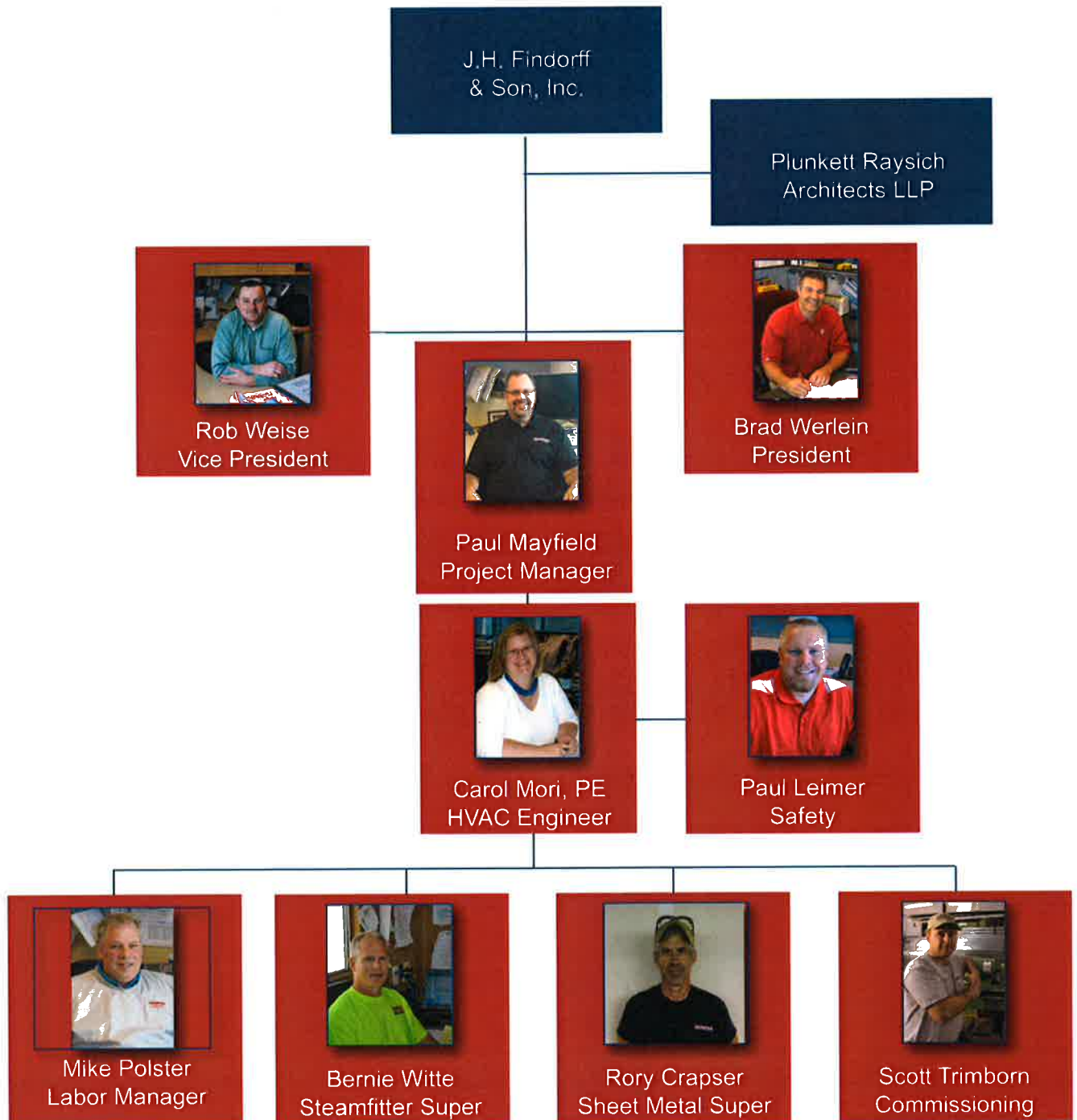
Bill Honkanen  
Facility Supervisor  
SAFC Pharma  
111 Kettle Moraine Trail  
Verona, WI 53593  
(608) 848-0170

Ron Schultz  
Ultratec  
450 Science Drive  
Madison, WI 53711  
(608) 238-5400

Tim Redman  
Building & Grounds Supervisor  
Riverdale School District  
(608) 739-2040

Douglas A. Olsen  
District Admin/Elem. Principal  
Kickapoo Area School District  
(608) 627-0102

# Our Team



# Brad Werlein

## *President*

Bachelor of Science - Mechanical Engineering  
University of Wisconsin - Madison

Brad has 15 years of experience in the HVAC industry. The first half of his career was in the corporate offices of Marshall Erdman and Associates as an HVAC systems engineer. He designed systems for health care facilities, including outpatient clinics, surgery centers, and hospitals. His most recent role was with Vyron Corporation in Madison, Wisconsin as a Sales Engineer. Brad worked with consulting engineers and contractors applying equipment on a wide range of commercial, industrial, institutional, and lab projects. In addition, he was responsible for negotiating equipment sales during the construction phase of a project. Brad has also managed the business operations of a Project Management organization where his responsibilities included sales, contract negotiation, human resources, marketing, and resource development.

Brad's responsibilities at GHAC include system design, value engineering, estimating, and equipment and subcontractor qualification.

Following is a sample of the projects and customers Brad has worked with:

- Kettle Foods New Production Plant
- University of Wisconsin IRC (WIMR)
- Dane County City-County Building
- Gehl Engine Test Cells and Research
- Kraft Foods
- U Square
- Jays Potato Chips
- Sequoya Library
- Bliss Communications - New Print Plant
- Dane County Regional Airport
- University of Wisconsin IRI Project
- Full Compass
- Wrigley's
- Lincoln Snacks
- Novartis
- University of Colorado
- Angi International
- Caterpillar
- Children's Hospital in Chicago
- University of Southern California
- Tesco Foods
- UW Medical Foundation
- Meriter Hospital
- St. Mary's Hospital
- UW Hospital
- Catalent



# Rob Weise

## *Vice President*

Bachelor of Science - Civil Engineering  
University of Wisconsin - Platteville

Rob is an integral part of the operations team providing leadership and oversight for over 60,000 square feet of fabrication/prefabrication facilities, fleet operations for over 100 fleet vehicles, and the service department. Rob has over 20 years of professional experience as a general contractor and is well versed in customer service, procuring new work, and process improvement.



Rob is well known throughout the Madison community having won "Project Manager of the Year" in 2012, and awarded InBusiness magazine's "40 under 40" in 2010.

Some of the projects Rob has been involved with:

- UW Health at the American Center
- UW Hospital Renovations
- St. Mary's Hospital
- Meriter Hospital (various)
- Wisconsin Institute for Discovery
- American Transmission Company
- St. Luke's Medical Center (various)
- Little Chute High School
- Carleton College
- St. Olaf College

# Paul Mayfield

## *Project Manager*

Bachelor of Science - Communications  
University of Wisconsin - Madison

Paul completed the Sheetmetal Local 18 five year apprenticeship and has worked in the sheetmetal trade as a field foreman for 10 years. Paul was also the shop foreman for General Heating during those 10 years. He has been a Project Manager for the last decade. Paul is involved in all aspects of HVAC project management and his responsibilities often include estimating, purchasing of equipment, subcontract letting, and coordinating of contract and other construction documents. Projects managed by Paul Mayfield in recent years include:



- VA Hospital - Madison
- Wisconsin Institute for Medical Research
- UW madison/MG&E - Madison
- WP&L Columbia Power Plant - Madison
- Kraft Foods - Madison
- WiCell - Madison
- Promega BTC - Madison
- Monsanto Forsythia - Madison
- Walgreens on State Street - Madison
- Ultratech - Madison
- Walnut Grove - Madison
- Kelly Financial - Madison
- Riverdale High/Middle School- Viola
- TASC - Madison
- Kickapoo School - Kickapoo
- Smart Motors - Madison
- Richland Center School District - Richland

# Carol Mori, P.E.

***Project Engineer***  
***LEED Accredited Professional***  
***Quality Commissioning Process Provider***

Bachelor of Science - Architectural Engineering  
Environmental and Structural Design  
Milwaukee School of Engineering

Carol has two years experience as an operations and maintenance engineer in a 20-story office building in Milwaukee. She also has eleven years experience as an HVAC design engineer for a Madison-based consulting engineering firm, specializing in commercial, institutional, laboratory, health care and research, and development facilities.

During her thirteen years of experience as Project Engineer with GHAC, Carol's responsibilities have included system analysis and design, LEED analysis and documentation, commissioning documentation, load calculation and energy modeling, and field investigation.

Carol has project managed or design built the following projects:

- Affiliated Engineer Office Building
- Arbor Gate
- Beaver Dam Community Hospital
- Blessed Sacrament
- BTC/Promega Pilot Plant
- Christ Lutheran Church
- Findorff Construction Headquarters
- First Business Bancshares Center
- GHAC Corporate Headquarters
- Inacom Office Building
- Pacific Cycle World Headquarters
- M&I Bank Waunakee
- Middleton Community Church
- Mt. Horeb UW Clinic
- Oak Bank
- Rhodia Natural Extracts Plant
- Ultratec
- UW Tissue Digester Building
- UW MF Admin Building
- Women's Health
- Walgreen's (various)
- Wisconsin Community Bank
- Zimbrick Automotive (various)
- Epic Farm Campus
- Epic Utility Building 3 & 4
- UWHC Digestive Health Clinic
- Meriter Deforest Clinic
- Meriter Monona Clinic



# Paul Leimer, CRIS



## *Safety*

Naval Health and Science Degree  
Construction Risk Insurance Specialist  
OSHA Competent Person for applicable standards

Paul has over 17 years of safety and risk management experience. He has implemented successful safety and health programs for many high hazards industries including mining, industrial, residential, and commercial construction. Paul also has provided risk management and safety consulting services to some of the Midwest's largest and most influential contractors for over 12 years. As a proven safety professional, Paul understands the challenges of safety in the construction industry and has directed superior safety performance for companies he has worked with.

Paul specializes in the following:

- Safety Management
- Trenching/Excavation
- Contractor Safety
- OSHA 10/30 Hour Instructor
- Management Accountability
- Scaffolding
- Specialty Training
- Various IH Testing
- Return to Work
- Fleet/CDL Training
- Cost Reductions
- Accident Review
- Policy Review
- Contract Review
- Training Seminars
- Strategic/Tactical Planning
- Risk Assessment/Contingency Planning
- Crisis Management

Paul has several published articles such as:

- "What is Loss Prevention in Nevada" Nevada Insurance Weekly, March 2000
- "Risk Transfer" The Saint Paul State of Safety News Information, August 2003
- "Accident Investigation" The Saint Paul Exposure Guideline, September 2003
- "Dangers of Mold" M3 Client Newsletter, November 2004

Paul also received two Bronze Awards while working for Zurich Insurance.

# Mike Polster

## *Labor Manager*

Bachelor of Science - Construction Management  
University of Wisconsin - Stout

Mike joined General Heating and Air Conditioning in February 2011 as the Labor Manager. In his current role he manages/obtains the field workforce, assists project managers with day-to-day field operations, union issues, and interfaces with general contractors and project owners as required.



Prior to joining GHAC, Mike worked 28 years for Marshall Erdman and Associates, a Design Build Architectural/Engineering Construction company that specialized in the Design/Engineering and Construction of outpatient clinics, specialty clinics, surgery centers, and hospitals nationwide. At Marshall Erdman, Mike spent time as a Project Manager and he was in charge of all the HVAC, plumbing, and electrical purchasing for \$340,000,000 annually in construction projects nationwide.

Below is a list of customers Mike has worked with during his career:

- Marshfield Clinic, Marshfield, WI
- Dean Clinic, Madison, WI
- SSM, Madison, WI
- Orthopedic Hospital, Glendale, WI
- Mayo Clinic, Rochester, MN
- Mankato Clinic, Mankato, MN
- Kaiser Permanente, Washington, DC
- Gurnee MRI Associates, Gurnee, IL
- Lake Forest Hospital, Lake Forest, IL
- St. Joseph Hospital, Elgin, IL
- Proctor Health Care, Peoria, IL
- Carle Clinic, Champaign, IL
- University of Iowa, Iowa City, IA
- Yellowstone Medical Center, Billings, MT
- Great Plains Clinic, Sioux Falls, SD
- Riverside Medical Center, Riverside, CA
- Heart Hospital, Loma Linda, CA
- Cleveland Clinics, Strongsville, OH
- Cleveland Clinics, Naples, FL
- Cleveland Clinics, Weston, FL
- University of Florida, Gainesville, FL
- Robinwood Med Ctr, Hagerstown, MD
- John Hopkins, Columbia, MD
- Walter Reid, Bethesda, MD
- LECOM, Erie, PA
- UPMC, Seneca, PA
- OSCHNR Clinic, Baton Rouge, LA
- Kelsey Seybold, Houston, TX
- Epic Systems, Verona, WI
- Meriter Hospital, Madison, WI
- UW La Bahn Arena, Madison, WI
- UW Hospital, Madison, WI
- Kettle Foods, Beloit, WI
- WIMR, Madison, WI

# Bernie Witte

## *Steamfitter Superintendant*

Bernie has worked in the testing, industrial and manufacturing industries for nearly three decades. He plans and directs on-site construction activities for a variety of projects. He is involved in projects from the design phase through construction and commissioning. Bernie has completed the 5-year steamfitter apprenticeship program and is also a certified welder.



Following is a sample list where Bernie has acted as our steamfitter foreman:

- Cummins Engine Company
- University of Wisconsin - Heating Plant
- University of Wisconsin - Kohl Center
- Capital Heat and Power, Chilled Water System
- Ricardo North America - Engine Test Facilities
- Diametrics Medical
- Meriter Hospital - various projects
- Richland Center Hospital - additions including New Power House
- American Family East Park One Office
- Lands End Dodgeville Chiller Plant
- Sand Ridge Prison - Power House

# Rory Crapser

## *Sheetmetal Superintendent*

Rory has over 18 years in this trade including the last 10 years as a foreman. His experience includes working in institutional, office and hospitals.

Following is a sample list where Rory has acted as our sheetmetal foreman:

- St. Mary's Hospital
- Physicians Plus
- John Deere Insurance Office Building
- Stoughton Hospital
- UW Hospital - East Side Clinic
- Edgewood College Humanities Building
- SAFC Verona Facility
- Covance CRU Pharmacy
- Sun Prairie Bird School
- Madison Investment Advisors
- UW Hospital and Clinics - East Side Clinic
- UW Hospital and Clinics - Ambulatory Surgery



# Scott Trimborn

## *Commissioning Manager*

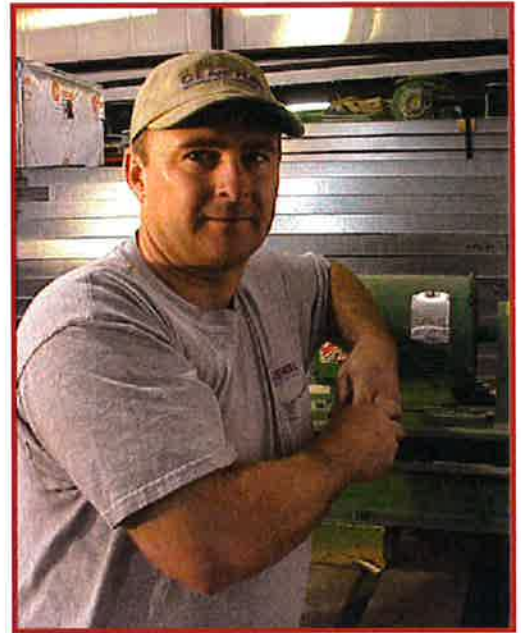
Scott has 20 years in this trade. His experience includes working in institutional, office, and hospital environments. Scott has also worked as an HVAC serviceman making him a valuable asset to our team.

Following is a sample list where Scott acted as steamfitter foreman or commissioning manager:

- Wisconsin State Capital
- Mortenson Investments
- BTC Promega
- Mentor Biologics
- UW Medical Foundation Administrative Building

Being well versed in both steamfitting work and HVAC equipment service, Scott is a valuable asset for us when it comes to start-up and commissioning. Scott knows how to install the equipment, as well as start it, reducing the redundancy of needing multiple crews on hand to make minor adjustments in the commissioning process.

Scott will be available on-site to perform equipment start-up as it becomes available. He is well trained in our commissioning process and is able to document his work, as well as answer any questions that come up during the owner training process.







## Liberty Mutual Surety

January 11<sup>th</sup>, 2016

Brad Werlein  
President  
General Heating and Air Conditioning, Inc.  
3002 Perry Street  
Madison, WI 53725

RE: General Heating and Air Conditioning, Inc.  
Bond Program 2016

Dear Mr. Werlein:

Liberty Mutual Insurance Company with an A.M. Best Rating of A XV is the surety partner for General Heating and Air Conditioning, Inc.

General Heating and Air Conditioning, Inc. is a valued client of Liberty and is held in the highest regard. General Heating and Air Conditioning, Inc. has in place lines of credit with Liberty Mutual Insurance Company allowing for bonding projects within an aggregate program of \$ 150,000,000. In the past, we have approved bonds for single projects exceeding \$ 30,000,000.

Our agreement to provide work programs and execute bid and or final bonds is subject to mutually acceptable final contract terms, conditions, financing and underwriting conditions to both General Heating and Air Conditioning, Inc. and Liberty at the time of request for suretyship.

Any arrangements for a bond, or bonds, is a matter between General Heating and Air Conditioning, Inc. and ourselves, and we assume no liability to third parties or to you, if for any reason we do not execute said bond, or bonds.

If you should have any questions please feel free to contact me at 262.853.4622.

Sincerely,

Bradley S. Babcock  
Attorney-in-Fact  
Liberty Mutual Insurance Company

**Member of Liberty Mutual Group**



# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS



3/3/2016

Request For Proposal



SUBMITTED BY:

H & H INDUSTRIES, INC.

2801 Syene Road  
Madison, WI 53713



# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

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# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

FIRM – CONSTRUCTION VOLUME, BONDING AND SAFETY



H & H Industries, Inc. began in 1901 as W.J. Hyland, a small plumbing and pipe fitting business located in Madison, Wisconsin. The company was incorporated in the State of Wisconsin as H & H Industries, Inc. on March 18, 1974.

### Annual Construction Volume:

2015 - \$42,772,868  
2014 - \$41,930,882  
2013 - \$32,565,032  
2012 - \$32,921,700  
2011 - \$30,382,271

### Bonding Capacity:

Single Contract - \$15,000,000  
Aggregate - \$35,000,000

### Bonding Rates:

First \$100,000 - \$8.75 per thousand  
Next \$400,000 - \$8.75 per thousand  
Next \$2 million - \$8.75 per thousand  
Next \$2.5 million - \$7.60 per thousand  
Next \$2.5 million – \$6.65 per thousand  
Over \$7.5 million - \$6.20 per thousand

### Safety EMR's for the last five years:

2016 – 0.74  
2015 – 0.82  
2014 – 0.86  
2013 – 0.88  
2012 – 0.82





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

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FIRM – WORK UNDER CONTRACT



## ESTIMATED COMPLETION 2016

AmFam ERB/NHQ Cooling	\$	383,218.00
Aquaculture Addition USGS Genoa	\$	517,640.00
Below Alumni Center	\$	185,851.81
Dane County Landfill C&D Waste	\$	278,000.00
Hawthorne Elementary Madison	\$	263,977.00
Land O Lakes Tank Farm Union Center	\$	582,314.69
Lucilles	\$	134,873.00
Maple Bluff Country Club	\$	133,140.00
MATC Culinary - Plumbing	\$	1,355,200.00
Mem Library AHU Upgrade	\$	274,111.00
Midvale Elementary - Plumbing	\$	91,023.75
Monroe Digester Heat Exch	\$	759,019.00
Mullins DHS Cent Plnt	\$	279,000.00
Mullins DHS Tenant	\$	948,187.00
Platteville Dorms	\$	2,987,597.61
PPD Boiler Replacement	\$	181,215.00
Seneca Gillette	\$	150,303.00
St Mary's Janesville	\$	200,880.00
St Mary's Imaging	\$	168,500.00
US Marshall Serv AHU Replace	\$	127,828.00
USGS Fish Wildlife AHU2	\$	192,519.00
UWHC Berbee Walsh Emergency Phase 1	\$	254,000.00
UWHC ED Phase 1	\$	256,018.29
UWHC ISO Fan B3 (Phase 5)	\$	350,000.00
UWHC ISO Fan E1 (Phase 6)	\$	149,631.00
UWHC ISOTEK & TEKAIR	\$	200,540.00
UWHC K4-1 Vivarium	\$	114,007.00
UWH K6/3 Clinical	\$	372,100.00
UWHC Park Ramp Exp - HVAC	\$	424,800.00
UWHC Park Ramp Exp - Plumbing	\$	338,000.00
UWHC Radiotherapy Expansion Ph 4 & 5	\$	631,506.00





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

FIRM – WORK UNDER CONTRACT



## ESTIMATED COMPLETION 2016 - continued

UWMF Cottage Grove	\$ 402,500.00
UWMF Fort Atkinson	\$ 535,000.00
VA Consolidate ICU's	\$ 1,265,463.00
VA Improve Energy Efficiency	\$ 415,000.00
Waukesha WWTP	\$ 13,843,475.00

## ESTIMATED COMPLETION 2017

Anchor Bank	\$ 4,688,547.00
HUB II The James - Plumbing	\$ 3,060,992.00
Wis Union Phase 2 - HVAC	\$ 4,974,778.11
Wis Union Phase 2 - Plumbing	\$ 1,377,459.12





**NEW GLARUS SCHOOL DISTRICT  
DESIGN BUILD MECHANICAL SYSTEMS**  
Request for Proposal

3/3/2016

FIRM – FINANCIAL STATEMENT



H&H INDUSTRIES, INC.  
AND ITS SUBSIDIARY  
Madison, Wisconsin

CONSOLIDATED FINANCIAL STATEMENTS  
December 31, 2014 and 2013





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

## Request for Proposal

3/3/2016

FIRM – FINANCIAL STATEMENT



CliftonLarsonAllen LLP  
www.cliftonlarsonallen.com

CliftonLarsonAllen

### Independent Accountants' Review Report

Board of Directors  
H&H Industries, Inc. and its Subsidiary  
Madison, Wisconsin

We have reviewed the accompanying consolidated balance sheets of H&H Industries, Inc. and its subsidiary as of December 31, 2014 and 2013, and the related consolidated statements of operations, stockholder's equity, and cash flows for the years then ended. A review includes primarily applying analytical procedures to management's financial data and making inquiries of company management. A review is substantially less in scope than an audit, the objective of which is the expression of an opinion regarding the consolidated financial statements as a whole. Accordingly, we do not express such an opinion.

Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America and for designing, implementing, and maintaining internal control relevant to the preparation and fair presentation of the consolidated financial statements.

Our responsibility is to conduct the reviews in accordance with Statements on Standards for Accounting and Review Services issued by the American Institute of Certified Public Accountants. Those standards require us to perform procedures to obtain limited assurance that there are no material modifications that should be made to the consolidated financial statements. We believe that the results of our procedures provide a reasonable basis for our report.

In our review reported dated April 29, 2014 with respect to the 2013 financial statements, we referred to a departure from accounting principles generally accepted in the United States of America because H&H Industries, Inc. and its subsidiary did not include the accounts of PAC Properties, LLC in those financial statements, which should have been consolidated as a variable interest entity. As discussed in Note 1 to the financial statements, H&H Industries has elected a retrospective accounting alternative which allows it not to apply variable interest entity guidance to PAC Properties, LLC. Accordingly, our present statement on the 2013 financial statements, as presented herein, that we are not aware of any material modification that should be made to the accompanying financial statements, is different from that expressed in our previous report.

As disclosed in Note 1 to the financial statements, the Company has elected to change its method of accounting for goodwill in 2014.

Based on our reviews, we are not aware of any material modifications that should be made to the accompanying consolidated financial statements in order for them to be in conformity with accounting principles generally accepted in the United States of America.



An independent member of Nexia International



# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

FIRM – FINANCIAL STATEMENT



Our reviews were made for the purpose of expressing a conclusion that there are no material modifications that should be made to the consolidated financial statements in order for them to be in conformity with accounting principles generally accepted in the United States of America. The information included in the accompanying schedules is presented only for purposes of additional analysis and has been subjected to the inquiry and analytical procedures applied in the review of the basic consolidated financial statements, and we are not aware of any material modifications that should be made thereto.

*Clifton Larson Allen LLP*

Racine, Wisconsin  
March 31, 2015





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

FIRM – FINANCIAL STATEMENT



## H&H INDUSTRIES, INC. AND ITS SUBSIDIARY CONSOLIDATED BALANCE SHEETS December 31, 2014 and 2013

	<b>ASSETS</b>	
	<u>2014</u>	<u>2013</u>
<b>CURRENT ASSETS</b>		
Cash	\$ 29,490	\$ -
Accounts receivable, net	8,934,576	5,943,231
Inventories	593,479	678,052
Costs and estimated earnings in excess of billings on uncompleted contracts	424,049	1,263,390
Prepaid expenses	<u>76,303</u>	<u>61,263</u>
Total current assets	<u>10,057,897</u>	<u>7,945,936</u>
 <b>PROPERTY AND EQUIPMENT</b>		
Vehicles	63,346	51,354
Tools and equipment	450,674	307,364
Leasehold improvements	81,613	73,806
Furniture and fixtures	187,521	138,753
Construction in progress	<u>16,053</u>	<u>-</u>
Total, at cost	799,207	571,277
Less accumulated depreciation	<u>263,925</u>	<u>160,641</u>
Net property and equipment	<u>535,282</u>	<u>410,636</u>
 <b>OTHER ASSETS</b>		
Goodwill, \$3,114,039, net of accumulated amortization of \$311,404 and \$0 at December 31, 2014 and 2013, respectively	<u>2,802,635</u>	<u>3,114,039</u>
 <b>TOTAL ASSETS</b>	 <u>\$ 13,395,814</u>	 <u>\$ 11,470,611</u>





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

FIRM – FINANCIAL STATEMENT



## LIABILITIES AND STOCKHOLDER'S EQUITY

	<u>2014</u>	<u>2013</u>
<b>CURRENT LIABILITIES</b>		
Checks written in excess of bank balance	\$ -	\$ 35,258
Note payable to bank	-	42,617
Current portion of long-term debt	961,170	677,618
Accounts payable:		
Trade	3,056,986	1,993,443
Retainage payable	469,456	406,794
Billings in excess of costs and estimated earnings on uncompleted contracts	1,687,230	2,219,949
Accrued expenses:		
Payroll and related payroll taxes	1,438,717	912,501
Union benefits	337,029	330,017
Retirement plan	273,026	251,351
Workmen's compensation	50,042	51,751
Distributions	558,131	-
Other	<u>97,638</u>	<u>98,989</u>
Total current liabilities	8,929,425	7,020,288
<b>LONG-TERM LIABILITIES</b>		
Long-term debt, less current portion above	<u>1,279,537</u>	<u>1,938,750</u>
Total liabilities	<u>10,208,962</u>	<u>8,959,038</u>
<b>STOCKHOLDER'S EQUITY</b>		
Common stock, no par value; 2,500 shares authorized; 697 shares issued and outstanding	-	-
Additional paid-in capital	319,287	319,287
Retained earnings	<u>2,867,565</u>	<u>2,192,286</u>
Total stockholder's equity	<u>3,186,852</u>	<u>2,511,573</u>
<b>TOTAL LIABILITIES AND STOCKHOLDER'S EQUITY</b>	<u>\$ 13,395,814</u>	<u>\$ 11,470,611</u>

See independent accountants' review report and accompanying notes.





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

FIRM – FINANCIAL STATEMENT



## H&H INDUSTRIES, INC. AND ITS SUBSIDIARY CONSOLIDATED STATEMENTS OF OPERATIONS Years Ended December 31, 2014 and 2013

	<u>2014</u>	<u>2013</u>
CONTRACT REVENUES	\$ 41,930,882	\$ 32,433,533
COSTS OF CONSTRUCTION	<u>35,391,758</u>	<u>27,345,044</u>
Gross profit	6,539,124	5,088,489
OPERATING EXPENSES	4,283,422	3,231,128
GAIN (LOSS) ON SALE OF PROPERTY AND EQUIPMENT	<u>(4,019)</u>	<u>20</u>
Income from operations	2,251,683	1,857,381
OTHER INCOME (EXPENSE)		
Miscellaneous income	44,457	15,623
Interest income	14,268	-
Interest expense	(72,281)	(99,329)
Other expense	<u>(10,910)</u>	<u>(1,328)</u>
NET INCOME	<u>\$ 2,227,217</u>	<u>\$ 1,772,347</u>

See independent accountants' review report and accompanying notes.

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# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

FIRM – FINANCIAL STATEMENT



## H&H INDUSTRIES, INC. AND ITS SUBSIDIARY CONSOLIDATED STATEMENTS OF STOCKHOLDER'S EQUITY Years Ended December 31, 2014 and 2013

	Common Stock	Additional Paid-in Capital	Retained Earnings	Total
<b>BALANCE, DECEMBER 31, 2012</b>	\$ -	\$ 319,287	\$ 1,007,358	\$ 1,326,645
Stockholder distributions	-	-	(587,419)	(587,419)
Net income	-	-	1,772,347	1,772,347
<b>BALANCE, DECEMBER 31, 2013</b>	\$ -	\$ 319,287	\$ 2,192,286	2,511,573
Stockholder distributions	-	-	(1,551,938)	(1,551,938)
Net income	-	-	2,227,217	2,227,217
<b>BALANCE, DECEMBER 31, 2014</b>	\$ -	\$ 319,287	\$ 2,867,565	\$ 3,186,852

See independent accountants' review report and accompanying notes.





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

FIRM – FINANCIAL STATEMENT



## H&H INDUSTRIES, INC. AND ITS SUBSIDIARY CONSOLIDATED STATEMENTS OF CASH FLOWS Years Ended December 31, 2014 and 2013

	<u>2014</u>	<u>2013</u>
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>		
Net income	\$ 2,227,217	\$ 1,772,347
Adjustments to reconcile net income to net cash provided by operating activities:		
Depreciation and amortization	421,580	81,020
(Gain) loss on sale of property and equipment	4,019	(20)
Provision for bad debts	2,478	1,201
Additional earnout liability	300,000	-
Effects of changes in operating assets and liabilities:		
Accounts receivable	(2,993,823)	314,696
Inventories	84,573	66,011
Costs and estimated earnings in excess of billings on uncompleted contracts	839,341	(584,808)
Prepaid expenses	(15,040)	(13,716)
Accounts payable	1,126,205	(708,806)
Billings in excess of costs and estimated earnings on uncompleted contracts	(532,719)	750,489
Accrued expenses	551,843	478,754
Net cash provided by operating activities	<u>2,015,674</u>	<u>2,157,168</u>
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>		
Proceeds from sale of property and equipment	948	12,785
Purchase of property and equipment	(239,789)	(137,402)
Net cash used in investing activities	<u>(238,841)</u>	<u>(124,617)</u>
<b>CASH FLOWS FROM FINANCING ACTIVITIES</b>		
Decrease in checks written in excess of bank balance	(35,258)	(34,265)
Net payments under note payable to bank	(42,617)	(999,910)
Principal payments on long-term debt	(675,661)	(410,957)
Stockholder distributions	(993,807)	(587,419)
Net cash used in financing activities	<u>(1,747,343)</u>	<u>(2,032,551)</u>
<b>NET INCREASE IN CASH</b>	29,490	-
<b>CASH, BEGINNING OF YEAR</b>	-	-
<b>CASH, END OF YEAR</b>	<u>\$ 29,490</u>	<u>\$ -</u>

See independent accountants' review report and accompanying notes.





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

FIRM - CERTIFICATE OF INSURANCE



## CERTIFICATE OF LIABILITY INSURANCE

HHIND-2 OP ID: AB

DATE (MM/DD/YYYY)  
12/15/2015

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Hausmann-Johnson Insurance Inc 700 Regent St., PO Box 259408 Madison, WI 53725-9408 Jeff Frey - existing	<b>CONTACT NAME:</b> Jeff Frey <b>PHONE (A/C, No, Ext):</b> 608-257-3795 <b>FAX (A/C, No):</b> 608-257-4324 <b>E-MAIL ADDRESS:</b>
<b>INSURED</b> H&H Industries, Inc. 2801 Syene Rd Madison, WI 53713	<b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Cincinnati Insurance Company <b>INSURER B:</b> Nautilus Insurance Company <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJ <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:		CPP0895582	01/01/2016	01/01/2017	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 Elec Data \$ 500,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS		CPA0895582	01/01/2016	01/01/2017	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 0		CPP0895582	01/01/2016	01/01/2017	EACH OCCURRENCE \$ 14,000,000 AGGREGATE \$ 14,000,000
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	WC192371006	01/01/2016	01/01/2017	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 100,000 E.L. DISEASE - EA EMPLOYEE \$ 100,000 E.L. DISEASE - POLICY LIMIT \$ 500,000
B	Professional & Pollution Liab.		CCP201644110	11/24/2015	11/24/2016	Limit 2,000,000 Ded. 25,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 H&H Industries will meet any higher insurance requirements by combining the primary underlying policy with our Umbrella limit, which contains primary & non-contributory language by endorsement, when required in contract

<b>CERTIFICATE HOLDER</b>  Master Certificate	<b>MASTERC</b>	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

PROPOSED FEE STRUCTURE – LABOR RATES



## LABOR RATES

Classification	Regular	OT	DT
Steamfitter Foreman	\$86.28	\$118.22	\$147.25
Steamfitter Journeyman	\$80.33	\$109.36	\$135.76
Steamfitter Apprentice	\$65.41	\$87.19	\$106.99
Sheetmetal Foreman	\$78.87	\$103.7	\$126.27
Sheetmetal Journeyman	\$75.67	\$98.96	\$120.14
Sheetmetal Apprentice	\$65.77	\$85.58	\$103.58
Sheetmetal Shop rate	\$91.52	\$124.13	
Steamfitter shop rate	\$93.33	\$131.34	
Plumbing Foreman	\$74.94	\$100.53	\$126.13
Plumbing Journeyman	\$71.15	\$94.99	\$118.82
Plumbing Apprentice	\$60.90	\$79.97	\$99.03
Service	\$110.00		
Trade specific CAD/BIM	\$85.00		
Truck Driver	\$50.00		
Estimator	\$60.00		
Project Manager	\$90.00		
Project Engineer	\$90.00		
Project Executive	\$100.00		

**Included in wage rates:** Accounting and small tools (as defined in MCAA Tool and Equipment Rental Rate Guide 2014/2015 page 61 Appendix II)





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

PROPOSED FEE STRUCTURE – MARK-UPS



**Excluded in wage rates:** Tools as listed in included tool rate sheets. Any equipment H & H rents will be passed on as cost plus material mark up

Markup on Labor	4%
Markup on Materials	4%
Markup on Equipment	4%
Markup on Subcontractors	4%
Markup on owner furnished equipment	4%





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

## PROPOSED FEE STRUCTURE – TOOL RATES



<u>EQUIPMENT TYPE</u>	<u>MONTHLY RATE</u>	<u>HOURLY RATE</u>
2 Wheel Dolly	\$12.72	\$0.07
Air Hammer	\$2.18	\$0.01
Aluminum Pix (8'-16')	\$24.21	\$0.13
Anchor Gun	\$14.38	\$0.08
Angle Grinder (4"-6")	\$52.00	\$0.29
Angle Grinder (7"-9")	\$78.00	\$0.43
Appliance Dolly	\$7.76	\$0.04
Band Saw (4")	\$128.00	\$0.71
Belt Sander	\$56.43	\$0.31
Bosch Unishear	\$34.88	\$0.19
Chain Fall (2 Ton)	\$47.96	\$0.27
Chain Pipe Vise	\$59.00	\$0.33
Chain Saw	\$325.00	\$1.81
Chop Saw	\$84.00	\$0.47
Circular Saw (Cordless)	\$88.00	\$0.49
Clamp Meter-Fluke HVAC True RMS	\$30.56	\$0.17
Come-A-Long (1 Ton)	\$38.19	\$0.21
Come-A-Long (6 Ton)	\$142.69	\$0.79
Concrete Saw	\$659.00	\$3.66
Copper cleaning reaming machine	\$111.00	\$0.62
Copper Cutter (Battery)	\$14.56	\$0.08
Copper Cutter (Electric)	\$15.78	\$0.09
Core bit (2")	\$124.00	\$0.69
Core bit (5")	\$242.00	\$1.34
Core Drill	\$192.00	\$1.07
Drain Cleaning Machine (Rigid K-400)	\$67.66	\$0.38
Drill (1/2", cordless)	\$131.00	\$0.73
Drill (3/8", cordless)	\$107.00	\$0.59
Drill (Right Angle, 3/8")	\$135.00	\$0.75
Electric Nibbler	\$99.00	\$0.55
Electric Saw	\$75.00	\$0.42
Electric Welder	\$207.00	\$1.15
Fan (Box)	\$15.00	\$0.08
Gang Box	\$98.00	\$0.54
Gas Welder	\$771.00	\$4.28





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

## PROPOSED FEE STRUCTURE – TOOL RATES



<u>EQUIPMENT TYPE</u>	<u>MONTHLY RATE</u>	<u>HOURLY RATE</u>
Grinder (4", Metabo)	\$8.15	\$0.05
Hammer Drill (3/4")	\$245.00	\$1.36
Hand Tools	\$0.00	\$0.00
Hydro Test Pump	\$81.03	\$0.45
Jet Sweat Kit	\$27.78	\$0.15
Ladder (06')	\$50.00	\$0.28
Ladder (08')	\$54.00	\$0.30
Ladder (10')	\$59.00	\$0.33
Ladder (12')	\$65.00	\$0.36
Ladder (14')	\$69.00	\$0.38
Ladder (16')	\$74.00	\$0.41
Ladder (Extension, 20')	\$60.00	\$0.33
Ladder (Extension, 22')	\$67.00	\$0.37
Ladder (Extension, 24')	\$69.00	\$0.38
Ladder (Extension, 28')	\$71.00	\$0.39
Ladder (Extension, 32')	\$76.00	\$0.42
Large Duct Hoist	\$199.00	\$1.11
Laser Level	\$45.00	\$0.25
Machine Threader (700)	\$130.87	\$0.73
Manometer Testo 510	\$18.78	\$0.10
Megohmmeter	\$7.42	\$0.04
Micro CA-100 Inspection Camera	\$29.64	\$0.16
Multimeter Fluke True RMS	\$30.56	\$0.17
Nail Gun	\$90.00	\$0.50
Orion Fuse machine	\$66.12	\$0.37
Pallet Jack	\$34.33	\$0.19
Pencil Grinder	\$65.00	\$0.36
Pick-up (1/2 Ton)	\$669.00	\$3.72
Pipe or Duct Lead Testing Machine	\$231.00	\$1.28
Pipe Threader (300)	\$388.00	\$2.16
Pipe Threader (535)	\$513.33	\$2.85
Pipe Threader (General)	\$450.00	\$2.50
Pipe V Stand	\$14.00	\$0.08
Power Shear (KETT Double Cuts)	\$16.32	\$0.09
Power Shear (Makita, 18 ga)	\$33.70	\$0.19





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

PROPOSED FEE STRUCTURE – TOOL RATES



<u>EQUIPMENT TYPE</u>	<u>MONTHLY RATE</u>	<u>HOURLY RATE</u>
Power Washer	\$16.67	\$0.09
Pressure Washer	\$48.00	\$0.27
Right Angle Dry Core Drill (1/2")	\$168.00	\$0.93
RubberMaid Cart	\$28.00	\$0.16
Scissors Lift	\$576.00	\$3.20
Silage Cart	\$62.89	\$0.35
Small Air Compressor	\$60.00	\$0.33
Torch	\$62.00	\$0.34
Trailer (Utility)	\$185.00	\$1.03
Vacuum (Wet/Dry)	\$48.00	\$0.27
Welder (Small Electric)	\$225.00	\$1.25
Welding Screen	\$9.00	\$0.05





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

PROJECT TEAM



**LEE MCCANN**  
Project Manager

## BIOGRAPHY

Lee McCann is an HVAC project manager/estimator with over 44 years of experience in the construction industry, including sheet metal field supervision and shop fabrication. His project management responsibilities include purchasing of equipment, subcontract letting, jobsite coordination, safety policy oversight, and system redesign for value engineering.

## EXPERIENCE

- UW Hospital and Clinics (various projects)
- Wisconsin State Capitol
- Cuna Mutual
- St. Mary's Hospital
- Sand Ridge Correctional Institution
- Overture Center
- Epic Systems Campus 1 & 2
- Epic Campus Geothermal
- Anteco Pharma
- Pike Technologies
- Meriter Monona – 2nd Floor Buildout
- US Armory – Wright Street
- UW Platteville Pool
- SW Health Center Expansion – Platteville

## EDUCATION

- Associate Degree in Business from MATC
- Undergraduate Studies in Civil Engineering at UW
- Full 5-year Sheet Metal Apprenticeship

## REFERENCES

- Alan Meyer – UW Hospital & Clinics
- Mike Dillis – JH Findorff & Son
- George Austin – Overture Development Corp.





## NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

PROJECT TEAM



**MARK SCHAUF**  
Steamfitter Foreman

### BIOGRAPHY

Mark Schauf started his steamfitter career in 1990 as a pre-apprentice. He served a five-year apprenticeship through Local 394. Before completing his apprenticeship, he became a field foreman. After eight years of foreman experience, he joined the H & H Team. Matt also has a background with powerhouse work.

### EXPERIENCE

- Lands' End Building 5A and Warehouse – Dodgeville
- Charter Communications – Madison
- Aberdeen 12-Story Student Housing – Madison
- Inn on the Park – Madison
- River Valley High School – Spring Green
- Netherwood Knoll Elementary – Oregon
- Upland Hills Hospital – Dodgeville
- American Family Insurance – Madison
- Oak Creek Powerhouse – Milwaukee
- Portage Powerhouse - Portage
- Charter Street Powerhouse - Madison

### EDUCATION AND CERTIFICATIONS

1985-1987: UW-Platteville – Mechanical Engineering

Five Year Steamfitter Apprenticeship

OSHA 10 & 30 Certifications

Certified in First Aid and CPR





## NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

PROJECT TEAM



**DEAN ETHRIDGE**  
Sheet Metal Foreman

### BIOGRAPHY

Dean started his career with H & H Industries in 2001. He has been a foreman since 2003. Dean has worked on a wide variety of projects ranging from furnace, air conditioning and heat pump installations to large healthcare facilities and wastewater treatment plants.

### EXPERIENCE

- Monroe Wastewater Treatment Plant
- Unity Health Insurance
- Madison Gas & Electric (various projects)
- Fiore Company (various projects)
- Seneca Foods
- County Materials

### REFERENCES

Don Schwenn – MG&E (608) 843-0677

Phillip Maier – Fiore Co. (608) 220-9064

Dave LaBlanc – County Materials (920) 750-0825





## NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

SUBCONTRACTOR COORDINATION



H & H Industries, Inc. self performs the following:

- Sheet metal
- Piping
- Plumbing
- Equipment setting

H & H Industries, Inc. subcontracts the following:

- Controls
- Insulation
- Test and Balance

Subcontracts will be coordinated by the project manager and foremen.

Project manager will handle the following subcontractor coordination duties:

- Writing subcontracts
- Any change orders
- RFI distribution
- Overall schedule
- Scope review

Foremen will handle the following subcontractor coordination duties:

- Scheduling subcontractor crews on site
- Manpower of subcontractor crews on site
- Communication with subcontractor crews
- Scheduling of second tier subcontractors

The following subcontracts will be negotiated and integrated into the design team:

- Controls



The following subcontractors will be bid out after plans are completed:

- Insulation
- Test and Balance



## NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

SERVICE DEPARTMENT



H & H Industries Service Department provides knowledgeable, reliable support for all makes of heating and cooling equipment. We have ten fulltime service technicians.

Over 100 years of service has taught us how to do the job right the first time with materials that stand the test of time. We combine an old fashioned devotion to good business practices and superior materials with a new-age approach to conserving energy, cutting costs and improving efficiency. H & H takes pride in completing high-quality projects on time and under budget.

The H & H Service team has been carefully chosen to maintain the high standards set by H & H Industries. H & H technicians attend regular seminars and training sessions to keep up to date on any new technologies in heating and cooling.

Scheduled Service Maintenance Agreements are a common sense way for customers to save money. These agreements are available for a variety of services with a wide array of scheduling options. Service maintenance agreements offer preventative care that keeps equipment operating at peak efficiency. Well-maintained equipment lasts longer and costs less to operate. This also helps the environment by requiring less energy.

With the industry experience of our Service Department, H & H Service is uniquely qualified to handle any and all service issues. We are proud of our commitment to quality, dependable service work and eager to reinforce the reputation our company has established in the last 100 years.





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

WHY CHOOSE H & H INDUSTRIES, INC.

H & H Industries has extensive HVAC experience in educational settings:



PROJECT NAME	SIZE	TYPE	CONTRACT METHOD
MATC Truax and Russell Hall	\$3,954,200	Remodel/Addition	Hard Bid
New Berlin Schools	\$2,184,502	Remodel	Hard Bid
Baraboo Schools	\$2,150,000	Summer remodel	Design Assist
Oregon Netherwood	\$1,682,765	Remodel/Addition	Hard Bid
Monona Grove High	\$1,117,196	Summer remodel	Design Assist
RRC & Badger Rock	\$978,887	Remodel /Addition	Hard Bid
Pardeeville Schools	\$817,278	New	Design Build
MATC Backfill	\$700,000	Remodel	Hard Bid
Kennedy Elementary	\$661,350	Remodel	Hard Bid
Verona Elementary	\$550,239	New	Hard Bid
O'Keefe School	\$496,002	Remodel	Hard Bid
Waunakee School	\$488,100	New	Hard Bid
Craig/Franklin Schools	\$479,284	Boiler	Hard Bid
Argyle School	\$434,000	Remodel	Hard Bid
Mount Horeb Primary	\$416,176	Remodel plumbing	Hard Bid
Sandburg Elementary	\$395,472	Remodel	Hard Bid
Whitehorse - Schenk	\$309,762	Boiler	Hard Bid
CH Bird Elementary	\$302,500	Remodel	Hard Bid
UW Richland Science	\$276,041	Remodel	Hard Bid
Bose Elementary	\$250,387	Summer Remodel	Hard Bid
Franklin Middle School	\$246,608	Remodel	Hard Bid
Dodgeville High School	\$210,545	Summer Remodel	Hard Bid
Country Day School	\$189,811	Addition	Hard Bid
Lake Mills High School	\$177,000	Addition	Hard Bid
Deerfield Schools	\$146,900	Remodel	Hard Bid
	\$117,399	Remodel	Hard Bid





## NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

WHY CHOOSE H & H INDUSTRIES, INC.



H & H Industries has recently completed the following HVAC school projects:

### **Madison College Gateway and Truax - Madison, WI (2013-2014)**

- Project size: 300,000 SF (approximately) \$3,954,200
- Project Scope of Work: HVAC
  - VAV Air Handling Systems
  - Chilled water
  - Remodel and Addition
  - Lecture rooms, offices, and shop areas

### **New Berlin Schools- New Berlin, WI (2014 Summer shutdown)**

- Project size: 400,000 SF (approximately) \$2,150,000
- Project Scope of Work: HVAC
  - HVAC Upgrades and replacements in 5 Schools
  - Design Assist
  - Energy efficiency upgrade project
  - Air Handling System Retrofit
  - Unit Ventilator Upgrade
  - Air Cooled Chiller and Pumping
  - DDC system upgrade
  - Owner purchased equipment not in contract price above
  - Controls and Insulation purchased by ESCO

### **Netherwood Knoll Elementary - Oregon, WI (2015 Summer)**

- Project size: 70,000 SF (approximately) \$1,117,196
- Project Scope of Work: HVAC
  - Replace Unit Ventilators with RTU
  - Hot water/Chilled water RTUs
  - 60 VAV boxes
  - Summer shutdown
  - Design/Assist
  - Owner purchase not included in contract amount
  - DDC system upgrade





# NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

3/3/2016

PROJECT GMP & SCOPE OF WORK



**Total GMP Budget Price: \$797,000.00**

## **HVAC SYSTEMS (PROPOSED):**

The systems and solutions defined below are labeled to match the scope of work defined in the RFP issued on February 12, 2016 from J.H. Findorff & Sons, Inc.

### **New Glarus Elementary School**

**Gymnasium:** Existing Interior air handling units (2 each) and associated ductwork shall be demolished complete. Air-handling units shall be replaced by two (2) new packaged rooftop unit(s) and air distribution ductwork. The duct distribution is anticipated to be exposed spiral supply ductwork with drum type diffusers. Return shall be via wall grilles.

**RTU-1:** The existing constant volume, packaged rooftop unit (RTU-1) shall remain and will be converted to a variable air volume (VAV) rooftop unit. A variable frequency drive will be provided and installed on the existing supply fan. The existing (17) seventeen hot water zone reheats coils shall be removed and replaced with VAV air terminal units equipped with hot water reheat coils. Existing piping, valves, etc shall be reused as appropriate for the new reheat coils

Where applicable, existing temperature control valves will be re-used. All existing air distribution will remain as-is, and only modified to accommodate new VAV terminal units.

**RTU-2:** The existing constant volume, packaged rooftop unit (RTU-2) serving the Cafeteria shall remain. The existing controls shall be upgraded to implement a demand controlled ventilation sequence for RTU-2.



**Kitchen:** Make-up air matched to existing kitchen exhaust hood shall be supplied to the existing kitchen from either RTU-2 or from a new gas-fired make-up air unit.



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**Front Office & Secure Entry:** The (2) two existing split-systems and hot water wall fin radiation shall be removed as part of the Demolition scope of work to accommodate the interior renovation.

A new packaged single zone rooftop unit shall be provided to serve the renovated Administration Offices and Secured Entry. Supplemental hot water wall fin radiation will be provided in the Health Office and Reception areas. A new electric cabinet unit heater shall be provided in the new Vestibule.

### **New Glarus Middle / High School**

**Kitchen:** (1) New gas-fired make-up air unit with DX cooling and air distribution ductwork shall be provided to serve kitchen.

**Gymnasium:** The existing interior air handling unit and gas-fired duct furnace shall be demolished complete. A new single zone, packaged rooftop unit will be provided. New supply and return ductwork connections shall be made to the existing air distribution system. Existing distribution ductwork to be re-used.

**New Air Handling Units:** The two (2) existing interior, variable air volume air handling units shall be demolished. The units shall be replaced by two (2) new variable air volume (VAV), packaged rooftop units. New supply and return ductwork connections shall be made to the existing air distribution system. Existing distribution ductwork to be re-used. If during the design phase, it is determined that (1) one unit is more cost effective, we will go that route.

**Metal Shop:** Existing indoor, gas-fired make-up air unit to be demolished and replaced with a new gas-fired make-up air unit of equal size and capacity. Unit shall be reconnected to existing intake and distribution ductwork. Existing air distribution to remain as-is.

**Art Room:** A new heat capture exhaust hood shall be provided to serve existing Art Room kiln. The existing fan or a new exhaust fan will be provided to serve the exhaust hood.



**Administration Offices Remodel:** Air distribution ductwork (downstream of existing vav terminal units and reheat coils) serving the space will be modified to accommodate the interior renovation. Existing



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variable air volume (VAV) terminal units and hot water reheat coils shall remain. Existing thermostats and space sensors shall be relocated as required.

**Lab Classroom Remodel:** To accommodate the new science classroom renovation, four (4) new variable air volume (VAV) terminal units equipped with hot water reheat shall be provided to serve the new Science Labs, Classroom, and Office. In addition, a new exhaust fan shall be provided to serve the new chemical storage room. New duct distribution will be provided to serve the classrooms. Hot water supply/return piping will extended from existing to new reheat coils will valves and accessories.

It is assumed that no fume hoods are required in any of the Science Lab rooms.

The following is included in scope of work above and will be by others:

- Provide test and balance of new RTUs, MAUs, VAVs, and grilles/diffusers.
- Provide complete design and engineering of construction drawings for HVAC work. All work will be completed using Autocad 2010 or later.
- Submit drawings and associated fees to the state for review and permit.
- Coordinate HVAC needs with Electrical and plumbing contractor.
- Provide full HVAC as-built drawings in PDF and Autocad.

The following is not included in scope of work above and will be by others:

- Cost of bond
- Temporary utilities, heat or ventilation
- Temporary sanitary facilities
- Temporary water
- Architectural access doors
- Asbestos and Lead abatement
- Removal of hazardous / toxic materials





## NEW GLARUS SCHOOL DISTRICT DESIGN BUILD MECHANICAL SYSTEMS

Request for Proposal

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PROJECT GMP & SCOPE OF WORK



- Concrete work
- Site work
- Site clearing
- Site silt fence
- Ceiling removal/replacement
- Dust protection
- HEPA filtration
- Negative Air Machines
- Painting of any kind
- Louvers, furnish or install
- Fire extinguishers
- Motor Starters, furnish or install
- Heat tracing
- Electrical work except Automatic Temperature Controls
- Hookup of owner-furnished equipment
- Roof penetrations
- Roofing materials cut/patch/replacement
- Undercut doors and door grilles
- Floor cut/patch/repair
- Wall cut/patch/repair
- Fire and smoke control interlock wiring
- Disconnect switches
- Fire related enclosures
- Startup of owner furnished equipment
- Frame duct openings
- Overtime
- BIM of HVAC work or 3-D coordination
- MBE participation

