



Request for Proposals
To Provide
HVAC Improvements (Phase B)

Fallbrook Public Utility District
990 E. Mission Road
Fallbrook, CA 92088
(760) 728-1125

I. Introduction

On June 5, 1922, Fallbrook Public Utility District (FPUD) was incorporated to serve water from local area wells along the San Luis Rey River. Since that time, FPUD has continued to grow, and currently constructs, operates and maintains facilities to supply water and sewer services to the town of Fallbrook and water and reclaimed water to the surrounding residential and agricultural areas. Today, the District delivers potable water to some 35,000 people over a 28,000 square acre service area.

II. Scope of Required Services

In November 2024, the District commissioned a study to help plan an overall HVAC modernization of the entire administration building. The intent of this assignment was to evaluate the existing HVAC assets, determine any potential reconfiguration options to greater support the utilization of the space, and provide a budgetary cost for the recommended replacement/upgrade of equipment. An Administration Building Remodel/Expansion project was performed in 1994-1995 and included reconfiguring the HVAC components. Now, a large portion of existing HVAC equipment is approaching 30 years of service. The equipment includes five (5) rooftop units and eleven (11) split systems (indoor fan coil unit and outdoor condensing units). Since the remodel/expansion project, HVAC systems were typically only replaced upon failure, leaving several units critically close to the end of their useful life. In addition to the age of the existing HVAC units, the interior space utilization within the building has seen significant changes and modifications over the last 30 years. This offers an opportunity for modernization and reconfiguration of the HVAC systems to better fit the needs of the existing layouts. The study, which is provided to all prospective bidders, outlines the scope of services required for phase "B". This includes work such as replacement and/or repair of rooftop units and potential modification of ducting. Please note the District is only requiring pricing on services to be completed in phase "B" and we will be bidding phase "C" next fiscal year. Phase "A" has previously been completed. Bidder shall be responsible for installation and equipment including replacement of current thermostats with smart thermostats (Honeywell Home RTH6580WF Wi-Fi 7-Day Programmable Thermostat, White) and any other relevant parts needed to perform the full upgrade for phase "B".

III. Facility Location

FPUD Main Office – 990 E. Mission Road, Fallbrook, CA 92028.

IV. Evaluation Criteria

The lowest-priced responsive and responsible bidder shall be awarded the project.

V. Schedule for Selection and Award

1. Issue RFP.....8/11/26
2. Mandatory Site-Walk.....8/25/26 @ 9am PST
3. Bids Due.....9/9/26 @ 4pm PST
4. Board of Directors Approval.....9/21/2026
5. Expected job start.....Fall/Winter 2026

The mandatory site-walk is required to be attended by all prospective bidders and will occur on Tuesday, August 25th, 9am PST at the District's main office, 990 E. Mission Road, Fallbrook, CA 92028. Failure to appear at the site-walk will disqualify contractors from bidding on this project.

Bids are due on Wednesday, September 9th, 4pm PST.

VI. Submittal Requirements

Bidders shall complete and return the Contractor Information and Experience Form and provide a total-cost quote, on company letterhead, to Kevin Collins, Purchasing Supervisor, at kcollins@fpud.com.

VII. Special Conditions

- **Reservations** – This RFP does not commit the District to award a contract, to reimburse any costs incurred in the preparation of proposal pursuant to this RFP, or to procure or contract for work.
- **Right to Cancel** – The District reserves the right to cancel or revise this RFP, in part or in its entirety. If the District cancels or revises the RFP, the District will provide notice.
- **Additional Information** – The District reserves the right to request additional information and/or clarifications from any or all proposers to this RFP.
- **Prevailing Wage** – All public works jobs in excess of \$1,000 are required to pay prevailing wage, and the Contractor must keep sufficient certified payroll and records related to prevailing wage for this project.
- **Bonds** – Contractors will be required to provide payment and performance bonds for this project.

Failure to comply with the requirements of this RFP may result in disqualification.

CONTRACTOR INFORMATION AND EXPERIENCE FORM

A. INFORMATION ABOUT BIDDER

Indicate not applicable ("N/A") where appropriate.

NOTE: Where Bidder is a joint venture, pages shall be duplicated and information provided for all parties to the joint venture.

1.0 Name of Bidder: _____

2.0 Type, if Entity: _____

3.0 Bidder Address: _____

Facsimile Number

Telephone Number

4.0 How many years has Bidder's organization been in business as a Contractor?

5.0 How many years has Bidder's organization been in business under its present name? _____

5.1 Under what other or former names has Bidder's organization operated?: _____

6.0 If Bidder's organization is a corporation, answer the following:

6.1 Date of Incorporation: _____

6.2 State of Incorporation: _____

6.3 President's Name: _____

6.4 Vice-President's Name(s): _____

6.5 Secretary's Name: _____

6.6 Treasurer's Name: _____

7.0 If an individual or a partnership, answer the following:

7.1 Date of Organization: _____

7.2 Name and address of all partners (state whether general or limited partnership):

8.0 If other than a corporation or partnership, describe organization and name principals:

9.0 List other states in which Bidder's organization is legally qualified to do business.

10.0 What type of work does the Bidder normally perform with its own forces?

11.0 Has Bidder ever failed to complete any work awarded to it? If so, note when, where, and why:

12.0 Within the last five years, has any officer or partner of Bidder's organization ever been an officer or partner of another organization when it failed to complete a contract? If so, attach a separate sheet of explanation:

14.0 List Trade References:

15.0 List Bank References (Bank and Branch Address):

16.0 Name of Bonding Company and Name and Address of Agent:

B. LIST OF CURRENT PROJECTS (Backlog)

[**Duplicate Page if needed for listing additional current projects.**]

[illegible]

C. LIST OF COMPLETED PROJECTS - LAST THREE YEARS

[**Duplicate Page if needed for listing additional completed projects.**]

Please include only those projects which are similar enough to demonstrate Bidder's ability to perform the required Work.

[illegible]

D. EXPERIENCE AND TECHNICAL QUALIFICATIONS QUESTIONNAIRE

Personnel:

The Bidder shall identify the key personnel to be assigned to this project in a management, construction supervision or engineering capacity.

1. List each person's job title, name and percent of time to be allocated to this project:

2. Summarize each person's specialized education:

3. List each person's years of construction experience relevant to the project:

4. Summarize such experience:

Bidder agrees that personnel named in this Bid will remain on this Project until completion of all relevant Work, unless substituted by personnel of equivalent experience and qualifications approved in advance by District.

Additional Bidder's Statements:

If the Bidder feels that there is additional information which has not been included in the questionnaire above, and which would contribute to the qualification review, it may add that information in a statement here or on an attached sheet, appropriately marked:

END OF CONTRACTOR INFORMATION AND EXPERIENCE FORM