



**Williamson County
Facilities Management Department
HVAC Maintenance and Repair Services
RFP – 24RFP30**

JM Engineering, LLC
Due: February 20, 2024 at 3pm
Original



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EXECUTIVE SUMMARY

JM Engineering, LLC is a highly qualified facility maintenance company specializing in HVAC and electrical maintenance, repair and installation services. We have been in business for 23 years and have current contracts providing HVAC and electrical maintenance, repair and installation services for 19 public agencies listed below all located in Central Texas. JM Engineering's current project backlog is valued at over \$38 million, which reflects on our expertise, qualifications, depth of resources and ability to provide high quality and prompt services to our customers.

- Travis County (1 contract)
- Hays County (1 contract)
- City of Austin (3 contracts)
- City of San Antonio (1 contract)
- Texas DPS (3 contracts)
- TxDOT Austin District (1 contract)
- TxDOT TOD (1 contract)
- TxDOT TSMO (1 contract)
- Texas Facilities Commission (1 contract)
- Capital Metro (2 contracts)
- ERS of Texas (1 contract)
- Tx Health & Human Svcs (2 contracts)
- Tx Parks and Wildlife Dept (1 contract)
- Texas Comm on Envi Quality (1 contract)
- UT Applied Research Labs (2 contracts)
- Austin Community College (1 contract)
- Texas State Technical College (1 contract)
- Round Rock ISD (1 contract)

Over the past seven years, JM Engineering has completed hundreds of work orders valued in the millions of dollars for maintenance, 24/7 on-call service, repair and installation of over 1000 HVAC systems with the City of Austin at over 100 City facilities including Parks and Recreation Department, Building Services Department, Austin Fire Department, Austin Police Department, ABIA International Airport, Water Department and Austin Energy. With this extensive project experience with a large City or County agency, JM Engineering is very familiar with public facilities, sign in/out procedures, quote process, DO/PO process and City permitting. With this successful experience, JM Engineering will already be ahead of the competition and able to respond to the Williamson County's needs quicker, more efficiently and properly as expected by the County.

JM Engineering's proposed project team is staffed by 12 Texas licensed personnel with an average of 18 years of experience in commercial and industrial HVAC and electrical systems. All of JM Engineering's HVAC Technicians have TDLR AC licenses and Universal EPA certifications. Furthermore, JM Engineering has the following Texas licenses:

- TDLR licensed Air-Conditioning, Heating and Refrigeration Contractor;
- TDLR licensed Electrical Contractor;
- Texas Licensed Professional Electrical Engineering firm; and,
- HVAC Technicians have TDLR issued AC Technician licenses and Universal EPA certs.

Over the past few years, JM Engineering has become a leader in providing preventative maintenance of HVAC systems for public agencies in the Central Texas area. We currently

perform complete preventative maintenance services on monthly, quarterly and/or biannual basis for over 5000 commercial HVAC systems per year.

JM Engineering has developed a tried-and-true Preventative Maintenance Checklist that is completed for every HVAC unit. These checklists are compiled and provided as a report back to the customer with recommendations for repairs and/or inspections. A copy of JM Engineering's HVAC Preventative Maintenance Checklist and Service Ticket are provided in the Appendix at the end of this proposal.

Statement of Work to be Accomplished

JM Engineering's proposal is to provide quarterly and seasonal inspections, scheduled maintenance, service, installation and repairs for various HVAC equipment on Williamson County owned premises. JM Engineering will provide all necessary labor, materials, service equipment, tools, transportation, methods of communication, supervision, service reports and supplies required to provide these maintenance and repair services. Services will include scheduled maintenance, inspection, testing and repair services for Williamson County.

Plan to Accomplish and Perform Statement of Work

JM Engineering's initial maintenance and service plan to accomplish and perform the statement of work will be broken down into the following key steps:

1. Schedule and attend a Kick-Off/Transition Meeting with the County;
2. Perform an in-depth Site Assessment and Inventory of HVAC equipment;
3. Develop Monthly and Quarterly PM Schedule and submit to County for approval;
4. Submit Documentation including PM Checklists and Service Tickets for County approval;
5. Collect Project Documentation on all HVAC equipment and facilities;
6. Identify Critical / Problem areas to focus on and resolve; and,
7. Begin Preventative Maintenance and On-Site Support services.

Another important step to maintaining a modern, safe, dependable and efficient HVAC system for County facilities is to perform an asset management assessment and develop a Life Cycle Asset Management plan for each of the County's HVAC systems. As part of a complete and proactive maintenance program, each HVAC system's service life should be evaluated to determine age, condition, performance, vendor support, model discontinuation and parts availability. JM Engineering would propose a site assessment to collect this type of information on the HVAC units at all 103 County facilities. A Life Cycle Asset Management plan would be developed with a short- and long-term asset upgrade and replacement plan. This plan would provide recommendations to County staff on future needs, asset replacement and associated budget impacts.

Value Added Services

As an Engineering and facility maintenance company, JM Engineering brings over 20 years' experience in managing infrastructure for public agencies with fixed budgets and reduced resources. Based on this experience, JM Engineering will bring to the team fresh ideas to provide dynamic and proactive maintenance of the County's HVAC systems as well as find opportunities to save the County money, upgrade their infrastructure and improve the overall efficiency of the HVAC systems. Of course, all these value added services can be provided at the discretion of the County.

JM Engineering brings qualifications as a Texas licensed Professional Engineering company that can provide additional engineering services at the discretion of the County.

JM Engineering is also a TDLR licensed Electrical Contractor and an authorized Cummins, Kohler, Generac and Briggs & Stratton power generator sales, service and installation dealer that can provide warranty repairs, maintenance and installation services for all sizes and brands of generators.

To further highlight our qualifications, JM Engineering has provided the following two distinct advantages that separate us from the rest of the competition on this Request for Proposal:

1. JM Engineering is not a national chain or franchise service company, we are a local facility maintenance and engineering firm with highly qualified staff licensed in HVAC systems, electrical systems and electrical engineering. What this means to the County is that highly qualified staff will be assigned to the project at the start and will not change. We will ensure that the same technician that provides 24x7 on-call support will be performing the preventative maintenance. This ensures each technician is qualified and familiar with all HVAC systems in their building. Furthermore, the County will have direct contact with both owners (Jay and Melissa Weinberger) to ensure consistent and adequate resources are provided to fulfill the needs of Williamson County; and,
2. JM Engineering will perform all services in-house with licensed HVAC Technicians with Universal EPA certifications to ensure work is completed properly and safely; thus, maintaining a high level of performance, timely response and consistency on all maintenance and repair services.

EXPERIENCE, BACKGROUND AND QUALIFICATIONS

JM Engineering, LLC is a highly qualified facility maintenance company specializing in HVAC and electrical maintenance, repair and installation services. JM Engineering is a Texas licensed Air-Conditioning, Heating and Refrigeration Contractor, Electrical Contractor and Texas Licensed Professional Electrical Engineering company. We have been in business for 23 years and have current contracts providing HVAC and electrical maintenance, repair and installation services for 19 public agencies listed below all located in Central Texas. JM Engineering's current project backlog is valued at over \$38 million, which reflects our expertise, qualifications, depth of resources and ability to provide high quality and prompt services to our customers.



JM Engineering has over 23 years' experience working with public agencies throughout the State of Texas on federally funded local projects ranging from engineering to facility maintenance. The following list of agencies and associated contracts are all current projects where JM Engineering is providing HVAC and/or electrical maintenance and repair services in the Central Texas area. JM Engineering would be glad to provide references for any of these agencies at the County's request:

- Travis County (1 contract)
- Hays County (1 contract)
- City of Austin (3 contracts)
- City of San Antonio (1 contract)
- Texas DPS (3 contracts)
- TxDOT Austin District (1 contract)
- TxDOT TOD (1 contract)
- TxDOT TSMO (1 contract)
- Texas Facilities Commission (1 contract)
- Capital Metro (2 contracts)
- ERS of Texas (1 contract)
- Tx Health & Human Svcs (2 contracts)
- Tx Parks and Wildlife Dept (1 contract)
- Texas Comm on Envi Quality (1 contract)
- UT Applied Research Labs (2 contracts)
- Austin Community College (1 contract)
- Texas State Technical College (1 contract)
- Round Rock ISD (1 contract)

JM Engineering's proposed project team is staffed by twelve licensed personnel with over 175 years of combined commercial and industrial HVAC installation, on-site repairs, troubleshooting, and related HVAC services. These personnel will be involved with the project and the County on a daily basis. The HVAC Services Manager and his staff currently maintain the HVAC systems for Travis County, City of Austin, TxDOT and other local public agencies in the Austin metropolitan area. JM Engineering also has additional licensed HVAC Technicians as well as a Master Electrician and two Journeyman Electricians available to assist when there is an abundance of service calls or when work requires electrical system troubleshooting and repair. These personnel are committed to the project and will be involved from initial diagnosis to final repair to ensure consistency in services.

Business Organization

JM Engineering, LLC has been in business since 2001 and is a limited liability company incorporated in Texas. We are a family-owned small business with offices located in Austin, Round Rock and Buda, Texas. JM Engineering specializes in facility maintenance and engineering design, installation and maintenance of integrated electrical systems. Our facility and equipment maintenance services focus on HVAC, electrical and mechanical preventative and corrective maintenance services with an emphasis on proper work documentation including work orders, preventative maintenance schedules, equipment inventory, site assessments and field reports. Additional facility maintenance services include plumbing, lighting, power generators, UPS, elevators, fire protection and fire suppression systems. JM Engineering is also a Generac, Kohler, Cummins and Briggs & Stratton Authorized Service Dealer for power generators.

Primary Business Experience

JM Engineering's primary business experience is HVAC and electrical maintenance, repair and installation services including large maintenance contracts with Travis County, City of Austin, Texas Department of Transportation, Texas Facilities Commission, Texas Commission on Environmental Quality, Austin Community College and University of Texas – Applied Research Labs. Maintenance services include preventative and corrective maintenance of buildings, equipment, facilities and integrated control systems.

Professional Personnel

All JM Engineering personnel wear company uniforms, carry smart phones, drive company vehicles, speak English and pass a thorough Texas DPS criminal background check and CJIS training. Most technicians carry laptops to access and troubleshoot building automation systems and carry specialized tools to test, evaluate, calibrate and repair most HVAC and electrical systems.

JM Engineering's staff must pass a Texas DPS background check and fingerprinting through Identigo as well as CJIS training. This allows us to work at all public agencies including Law Enforcement agencies with access to Criminal Justice Information.

Equipment Resources and Tools

In addition to staffing resources, JM Engineering has an extensive inventory of vehicles, trailers and tools to ensure we can respond quickly, repair almost any equipment failure and provide the services as required by the RFP. Listed below is an inventory of vehicles, trailers and major tools that are available to support the County.

- 2006 Ford F350 Bucket Truck
- 2016 Ram 5500 Bucket Truck
- 2022 Ford F-150 Truck
- 2022 Ford F-150 Truck
- 2022 Ford Ranger XLT Truck
- 2021 Ford Ranger XLT Truck
- 2021 Ford Ranger XLT Truck
- 2021 Ford Transit Van
- 2021 Ford Transit Van
- 2020 Ford Transit Van

- 2020 Ford Transit Van
- 2019 Ford Transit Van
- 2018 Ford Transit Van
- 2018 Ford F-150 Truck
- 2018 Chevy Express Van
- 2017 Chevy Silverado 2500 Truck
- 2017 Chevy Express Van
- 2017 Ford F-150 V-8 Pickup Truck
- 2017 Chevy Traverse
- 2016 Ford Focus SE Hatchback
- 2016 Ford Transit Connect Van
- 2015 Ford Transit Connect Van
- 2013 Ford F150 V-6 Pickup Truck
- 2013 Ford Transit Connect Van
- 2013 Ford Transit Connect Van
- 2013 Ford Transit Connect Van
- 2022 Cargo Trailer (6.8'x12')
- 2022 Enclosed Cargo Trailer (6'x12')
- 2019 6'x12' Landscaping Trailer
- 2017 Gated Cargo Trailer (6' x 12')
- 2015 High Pressure Washing Trailer
- Oil Water Separator
- Landscaping tractor, mower, etc.
- Air Compressor & various power tools
- IR Camera, Megohmmeter & Manometer
- PPE and Safety gear
- Over \$50,000 in specialized tools

HVAC Licenses and Certifications

JM Engineering, LLC is a highly qualified HVAC and electrical systems installation, maintenance and repair company specializing in commercial HVAC and electrical systems. JM Engineering has the following Texas licenses:

- TDLR licensed Air-Conditioning, Heating and Refrigeration Contractor;
- TDLR licensed Electrical Contractor;
- Texas Licensed Professional Electrical Engineering firm; and,
- HVAC Technicians have TDLR issued AC Technician licenses and Universal EPA certs.

JM Engineering's TDLR licenses and EPA and OSHA certifications and training are provided in the Appendix at the end of this document.

Current Experience in HVAC Preventative Maintenance

Over the past few years, JM Engineering has become a leader in providing preventative maintenance of HVAC systems for public agencies in the Central Texas area. We currently perform complete preventative maintenance services on monthly, quarterly and/or biannual basis for over 5000 commercial HVAC systems per year.

JM Engineering has developed a tried-and-true Preventative Maintenance Checklist that is completed for every HVAC unit. These checklists are compiled and provided as a report back to the customer with recommendations for repairs and/or inspections. A copy of JM Engineering's HVAC Preventative Maintenance Checklist and Service Ticket are provided in the Appendix at the end of this proposal.

Current and Past Project Experience

Listed in this section are just a few of JM Engineering's current HVAC maintenance contracts with local public sector/government clients that range from \$35,000 to \$35,000,000 with similar scope to this Request for Proposal.

Travis County HVAC Maintenance Services

JM Engineering is currently providing preventative maintenance, troubleshooting, repair and installation services to Travis County Sheriff's Department primarily focused on the Travis County Correctional Complex in Del Valle (Travis County Jail). Some recent projects already completed include troubleshoot leak and replace evaporator coil on Trane 3.5-ton heat pump, leak check and replace compressor on AAON package unit, replace 51 supply and return grills and associated duct work in Kitchen of Travis County Jail and perform preventative maintenance on four boilers at the Travis County Jail. Working on projects in the Travis County Jail has special requirements, higher level of awareness and background clearances that all our technicians have obtained and experienced working in the Travis County Jail on multiple projects.

Agency: Travis County

Agency Reference: AJ Jalifi; Facilities MRD Manager; 512-854-4788 or 512-917-5459;
aj.jalifi@traviscountytexas.gov

Project Dates: Started April 2019 with expected completion April 2024

Project Budget: \$350,000

City of Austin HVAC Maintenance Services

JM Engineering is currently providing preventative and corrective maintenance services on over 1000 HVAC units for the City of Austin Building Services Department, Parks and Recreation Department, Water Department, Austin Police Department and Austin Energy. Services are work-order based and include 24x7 on-call corrective maintenance support, preventative maintenance, replacement of complete HVAC and electrical systems and installation of new HVAC and electrical systems for various City of Austin facilities.



Agency: City of Austin

Agency Reference: Thomas Hannan; General Maintenance Manager; 512-974-1707;
thomas.hannan@austintexas.gov

Project Dates: Started August 2016 with expected completion date of June 2027

Project Budget: \$19,561,000

City of Austin Maintenance and Repair Services for Variable Frequency Drives (VFD)

JM Engineering is currently providing preventative and corrective maintenance services on 52 Variable Frequency Drives (VFD) located at ABIA Airport and Central Utility Plant. Services are work-order based and include 24x7 on-call corrective maintenance support, preventative maintenance, replacement of VFD systems and upgrade of existing VFD's.

Agency: City of Austin – Aviation Department

Agency Reference: Eddie Salinas; Airport Systems Maintenance Supervisor; 512-530-2617; eddie.salinas@flyaustin.com

Project Dates: Started August 2019 with expected completion April 2024

Project Budget: \$656,000

City of San Antonio Animal Care Facility HVAC Maintenance and Repair Services

JM Engineering is responsible for providing HVAC preventative maintenance and repair services for 20 HVAC systems at the Animal Care Services facility. The systems range from 75-ton package units, 30-ton RTU's, split systems, mini-splits and exhaust fans. The preventative maintenance services are performed quarterly.



Agency: City of San Antonio Animal Care Services

Agency Reference: Ryan Sauter; Sr. Building Maintenance Supervisor; 210-851-6195; ryan.sauter@sanantonio.gov

Project Dates: Started February 2023 through January 2025

Project Budget: \$35,000

TxDOT Austin District-Wide HVAC Maintenance Services

JM Engineering is currently providing corrective, preventative and on-call maintenance services on 80 HVAC systems located at 17 facilities throughout the Central Texas area. Services are work-order based and include system upgrades and new installations. HVAC units include various sized units from 1-10 Tons including RTU's and Package Units; multiple York and Carrier chillers; and multiple boilers. JM Engineering performs preventative maintenance on 80 units across 17 campuses districtwide on a biannual basis.



Agency: Texas Department of Transportation – Austin District

Agency Reference: James Albers; Facilities Maintenance Supervisor; 512-696-6477; james.albers@txdot.gov

Project Dates: Started October 2017 with expected completion date of March 2026

Project Budget: \$815,176

TCEQ Server Room HVAC Systems Maintenance Services

JM Engineering is in charge of providing corrective, preventative and on-call maintenance of seven Liebert and Trane computer room HVAC systems (CRAC units) at TCEQ's Data Center. The seven HVAC systems consist of five 20 Ton Liebert units (Model DH2990A-AAEI), one 10 Ton Liebert unit (Model VS035ADA0EI346B) and one 5 Ton Trane split system. The seven HVAC systems support TCEQ's statewide server rooms, so they require a high-level of maintenance and 24/7 on-call support services. JM Engineering performs quarterly preventative maintenance services on all the units.



Agency: Texas Commission on Environmental Quality

Agency Reference: Kyle Peoples; Project Manager; 512-239-0866; kyle.peoples@tceq.texas.gov

Project Dates: Started September 2018 with expected completion date of December 2026

Project Budget: \$303,800

TFC Facility Maintenance of CPA Data Center

JM Engineering is in charge of providing twenty-four (24) hour, seven (7) day per week full-service maintenance for the HVAC, electrical and fire protection systems for the State of Texas CPA Data Center located at the lower annex of the Lyndon B. Johnson State Office Building. The HVAC system consists of eight Liebert CRAC units, SMARDT chiller, chilled water distribution system, two Armstrong chilled water booster pumps, seven Titus VAV's and condensate and non-potable water system. The electrical system consists of a Cummins 1000kW generator system, automatic transfer switch, two 400kVA UPS systems, power distribution units, remote power panels, transformers, circuit panels and disconnect switches. The fire protection systems maintained include fire detection and alarm systems, FM-200 system and pre-action fire alarm system. In addition to on-call support service, JM Engineering performs quarterly, semi-annual and annual preventative maintenance services on all the systems, equipment and subsystems.



Agency: Texas Facilities Commission

Agency Reference: Ernesto Garcia; Ops Manager; 737-256-0929; Ernesto.garcia@tfc.texas.gov

Project Dates: October 2023 through August 2025 with two optional 2-year extensions

Project Budget: \$532,533

TxDOT Toll Operations Division Facility Maintenance

JM Engineering is currently providing facility maintenance services for 11 toll plazas, 1 office building and 45 ramps along the SH 130, SH 45 and MoPac toll roads in Austin, Texas. The total square footage of facilities being maintained by JM Engineering is 1,062,154 SF. The services include both preventative and corrective maintenance provided on a 24/7 basis. The maintenance services cover complete preventative and corrective maintenance on all 401 HVAC systems, electrical switchgear, lighting, building electrical systems, 324 parking light fixtures, 4 elevators, 58 UPS, 52 generators, 54 automatic transfer switches as well as plumbing, fire alarm systems, fire suppression systems, fire extinguishers, painting, high pressure washing of lanes and canopies, landscaping and pesticide services. JM Engineering is on its eighth year of this contract and has not missed a performance metric or been penalized any disincentives on this project.



Agency: Texas Department of Transportation – Toll Operations Division

Agency Reference: Ralph O’Neal; Facilities Maintenance Manager; 512-874-9712;
ralph.oneal@txdot.gov

Project Dates: Started November 2013 with expected completion date of June 2027

Project Budget: \$34,468,049

UT Applied Research Labs HVAC Maintenance Services

JM Engineering is currently providing maintenance and repair of existing HVAC systems and installation of new HVAC systems at UT Applied Research Labs. Services include on-call corrective maintenance support, upgrade of existing HVAC systems, replacement of complete HVAC and electrical systems and installation of new HVAC and electrical systems for four research labs and two research centers located at JJ Pickle Research Campus and Lake Travis Test Station.



Agency: University of Texas – Applied Research Labs

Agency Reference: Terry Hestand; Facility Manager; 512-835-3767;
terry.hestand@arlut.utexas.edu

Project Dates: Started April 2018 with expected completion November 2026

Project Budget: \$1,450,000

Quality Program Standards

JM Engineering’s Quality Assurance and Control Plan is led by Jay Weinberger. Mr. Weinberger is Vice President and co-owner of JM Engineering. He is also a Texas Licensed Professional Engineer with over 30 years’ experience in electrical systems design, installation

and maintenance. Mr. Weinberger will lead the Quality Assurance and Control Plan. As an Owner, Mr. Weinberger ensures that all facets of projects and programs within the company are measured against and maintained at a high level of quality control.

One item that directly impacts quality standards within JM Engineering is how we approach project staffing and execution. JM Engineering ensures we have highly trained staff that are assigned to projects throughout the duration whether it involves preventative maintenance to service calls. This ensures consistency of services, minimal finger-pointing and uniformity to the Customer. More information on JM Engineering's Quality Assurance and Control Program is provided later in this proposal.

Continuing Education Program

JM Engineering provides a Personal Development Program for all employees that maintains their licenses, certifications and provides annual staff development and training. Depending on the employee's area of expertise and level of experience, JM Engineering ensures they attend annual training directly relevant to their technology and position. Furthermore, JM Engineering also pays for all licenses, continuing education required for licenses and renewals. As part of JM Engineering's Safety Program, Quarterly Safety Meetings are held that require all employees to attend. These meetings cover OSHA safety topics, but also cover new technologies and continuing education.

PROPOSED PLAN

Mobilization Plan and Scheduled Maintenance Plan

This section describes how JM Engineering will organize and perform the work as described in the Scope of Work of the Request for Proposal (RFP). JM Engineering's Mobilization Plan will be broken down into the following key steps and will be at the discretion and approval of the County:



1. Transition Meeting – basically a Kick-Off meeting with JM Engineering and the County to discuss the following issues:
 - a. Communicate any on-going problems/issues;
 - b. Discuss procedures for on-call support including contact numbers and emails;
 - c. Discuss preventative maintenance schedule and procedures;
 - d. Scheduling of preventative maintenance;
 - e. Review and approval of HVAC Preventative Maintenance Checklist;
 - f. Review and approval of Service Ticket;
 - g. Coordination of building access;
 - h. Determine list of equipment still under warranty and obtain contact information;
 - i. Discuss current status of any on-going work;
 - j. Discuss and review proposed work order documentation; and,
 - k. Discuss site assessment and inventory updates.
2. Site Assessment/Preventative Maintenance – as part of JM Engineering's preventative maintenance program and at the discretion of the County, a site assessment and inventory update will be performed to ensure the County's records are accurate and any potential equipment failures are caught prior to significant replacement/repair costs.
3. Quarterly and Seasonal Preventative Maintenance (PM) Schedule – at notice of award, JM Engineering will work with the County to develop a Preventative Maintenance schedule. This schedule will include the quarterly and seasonal inspections. The schedule will ensure each HVAC unit will be completed in the same order to ensure consistent timing between air filter changes and preventative maintenance inspections. Once the schedule is approved, JM Engineering will begin preventative maintenance, giving priority to the systems found in the worst shape.
4. Work Order Documentation – at notice of award, JM Engineering will meet with the County to discuss their method and procedures for issuing work orders, jobs and/or tasks. JM Engineering will review their Service Ticket with the County to ensure the required information is collected and documented for each service call. Weekly or monthly reports can also be generated to help track work orders from issuance to resolution. At the discretion of the County, JM Engineering can also track and report on KPI's to monitor and report on performance and track trends in equipment failures.
5. Project Documentation – find it, organize it and make it available for reference.

6. Identification of Critical / Problem Areas – based on the site assessment and inventory update, JM Engineering will provide an updated inventory and list of critical/problem areas to the County.
7. Begin Preventative Maintenance and On-Site Support Services.

Even though it is not a part of this service plan, JM Engineering believes there are benefits in having the qualifications, experience and licensing of a Professional Electrical Engineer and Electrical Contractor to support the County's HVAC systems at their discretion.

Staffing and Organization Plan

JM Engineering's proposed project team is staffed by 12 Texas licensed personnel with an average of 18 years of experience in commercial and industrial HVAC and electrical systems. All of JM Engineering's HVAC Technicians and Electricians are licensed by TDLR. Also, the AC Technicians carry a Universal EPA certification for refrigeration.

All staff proposed are available and have the capacity to fully dedicate themselves to this project to ensure it is completed on schedule and within budget. Furthermore, the personnel are committed to the project and will be involved from the Kick-Off Meeting to the After-Hours Emergency Calls to ensure consistency throughout the project.

The following Key Project Personnel are introduced along with a short summary of qualifications and experience.

Program Manager and Quality Assurance Manager

Jay Weinberger, PE has more than 30 years of experience as an electrical engineer and project manager in both the public and private sectors. Mr. Weinberger is a Texas licensed Professional Electrical Engineer. His engineering experience includes projects ranging from \$25,000 to over \$15 million. In addition, he has over 18 years' experience managing HVAC, electrical and generator equipment installation and maintenance contracts; 20 years' experience in systems engineering; 15 years' experience in PS&E design and 5 years' experience in facility planning.

HVAC Technical Expert

Chad Liesman has more than 28 years' experience in industrial and commercial maintenance and operations services including HVAC, electrical, mechanical and plumbing. Mr. Liesman is a Texas licensed Air Conditioning and Refrigeration Contractor as well as a Journeyman Electrician. Chad has extensive experience as a Project Manager managing large projects, technicians, training programs and maintenance online management systems. His experience includes managing multiple HVAC conversions on large commercial office buildings, replacement of HVAC chillers, DX HVAC units, air handlers, VAV boxes, DDC controls and commissioning equipment. He has developed and managed Safety Programs based on OSHA guidelines for all his projects. Mr. Liesman possesses a unique and effective mix of technical and

management skills in the fields of installation, maintenance and operations. Mr. Liesman is JM Engineering's Safety Officer.

HVAC Service Manager

Ronald Holman has over 32 years' experience in HVAC, electrical and plumbing systems installation, upgrades, maintenance and repair services for the commercial industry in the Central Texas Area. Mr. Holman has a TDLR issued Class A Air Conditioning and Refrigeration Contractor License as well as a Universal EPA Certification. Mr. Holman specializes in large commercial applications that require the use of advanced troubleshooting skills. He is a hard-working individual that excels in customer relations and is willing to go the extra mile to ensure customer satisfaction. He is a team player who prides himself on getting the job done in a manner that is productive for both the company and the customer.

Sr. HVAC Technicians

Dennis Oliver has over 26 years' experience in HVAC, electrical and plumbing systems installation, upgrades, maintenance and repair services for the commercial industry. Mr. Oliver has a TDLR issued Class A Air Conditioning and Refrigeration Contractor License as well as a Universal EPA Certification. Mr. Oliver specializes in large commercial applications that require the use of advanced troubleshooting skills. He is a hard-working individual that excels in customer relations and is willing to go the extra mile to ensure customer satisfaction. He is a team player who prides himself on getting the job done in a manner that is productive for both the company and the customer.

Jacob Barker has over 16 years' experience in maintenance, repair and installation of commercial HVAC systems including chillers. Mr. Barker is a TDLR registered AC Technician with a Universal EPA Certification. He has worked on all varieties of HVAC systems from chillers, RTU, package units, mini-splits, VAV boxes, exhaust fans, boilers, etc. He has extensive experience in Data Aire, Trane, Carrier, Ruud, American Standard, York, Liebert, Rheem, Friedrich, Daikin, Mitsubishi, Temtrol and Greenheck equipment. Mr. Barker also has a Bachelor of Science degree obtained from Tarleton State University in May 2012.

Master Electrician

Lucian Kuqi has over 17 years' experience in commercial and residential installation, maintenance and repair services of electrical systems including solar power, generators, UPS and electronics. Mr. Kuqi is a TDLR licensed Master Electrician and JM Engineering's Master of Record. He has managed hundreds of projects from start to finish ahead of schedule and under budget. Mr. Kuqi has excellent communication skills with people at all levels, can solve technical problems in a resourceful manner, can lead others and work efficiently and productively to meet the customer's needs. His core skills and competencies:

- Master Electrician in Texas and Massachusetts and OSHA 10 certified;

- Installation of hundreds of residential wiring projects (remodels and new construction);
- Installation of hundreds of commercial and residential solar projects;
- Excellent knowledge of NEC, IBC and local electrical and building codes;
- Team leadership, problem solving skills, excellent management of crises situations; and,
- Self-educated with excellent knowledge of IT and computer systems, apps and programs.

Organizational Chart

JM Engineering's Organizational Chart is provided on the following page as Figure 1. All staff listed on the chart are full-time, permanent JM Engineering employees that work out of the Austin Field Office. Each Manager/Supervisor has at least 20 years' experience in HVAC and electrical systems. The AC Technicians have an average of 14 years of experience in installation, maintenance and repair of residential, commercial and industrial HVAC and electrical systems. All proposed staff are licensed by the State of Texas. All HVAC Technicians and Managers carry Universal EPA certifications and have attended numerous training classes in various HVAC technologies, equipment and manufacturers.

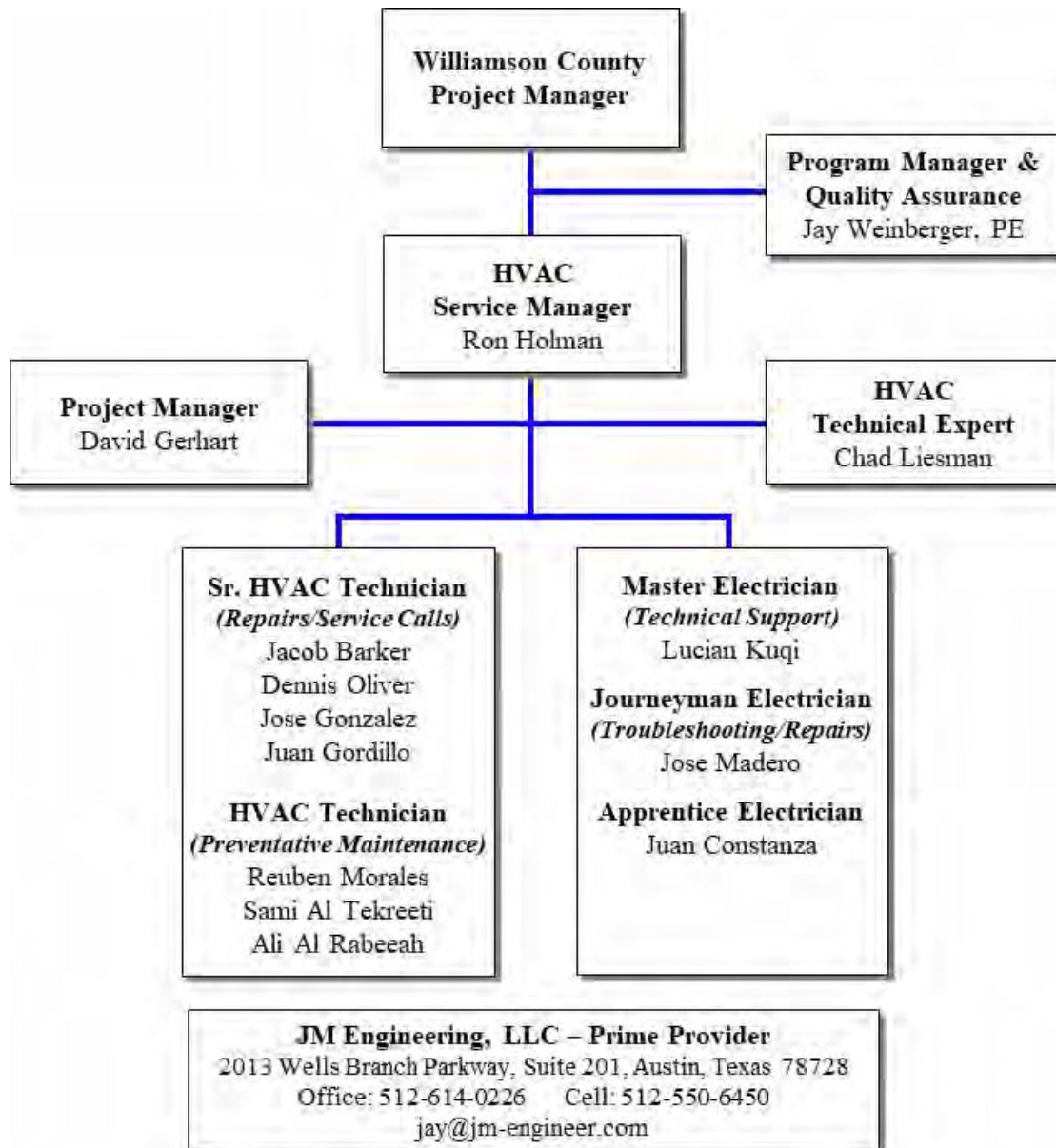


Figure 1 – JM Engineering’s Organizational Chart

Quality Control (QC) Program

JM Engineering’s Quality Assurance and Control Plan is led by Jay Weinberger. Mr. Weinberger is Vice President and co-owner of JM Engineering. He is also a Texas Licensed Professional Engineer with over 30 years’ experience in electrical systems design, installation and maintenance. Mr. Weinberger will lead the Quality Assurance and Control Plan.

Mr. Chad Liesman will oversee and review HVAC systems installation on this project to ensure all local codes, industry standards and safety requirements are followed. Mr. Liesman is the Operations Manager with JM Engineering and serves as Safety Program Manager. He is a Texas

Licensed Air Conditioning and Refrigeration Contractor and has over 25 years' experience in industrial and commercial HVAC maintenance and operations services.

As HVAC Services Manager, Mr. Ron Holman will provide daily supervision and oversight of all work and will report back to Mr. Liesman on any issues or reports. Mr. Holman is also a Texas Licensed Air Conditioning and Refrigeration Contractor with over 32 years' experience.

JM Engineering's Quality Assurance and Control Plan implements checkpoints and gates throughout the construction process to ensure the Quality Assurance Managers can review and approve proposed materials, installations and safety measures. Some examples of checkpoints on this project that involve reviews/approvals by Quality Assurance Managers are listed below:

- Shop Drawing Submittals for Equipment Proposed
- Proposed Installation Schedule
- Infection Control Plan and Permit (if applicable)
- Safety and Noise Reduction Measures Implemented
 - Outside Construction Fencing and Inside Room Barriers
 - Dust Management - Sealing of Doorways, Windows and AC Vents
 - Dust Control During Drilling (spray bottle/shaving cream)
 - Electrical Lock Out Tag Out
 - Personal Protective Equipment (PPE) including face masks and gloves
- Construction/Installation Checkpoints
- JM Engineering's Installation Inspection by Quality Assurance Managers
- County Inspection and Acceptance
- Factory Turn-On Including Start-Up Logs
- Training Plan
- Final Equipment Documentation including As-Built Drawings
- Refrigeration Logs and Completed Service Tickets

Each one of these checkpoints will be measured against the contract requirements and JM Engineering's Quality Assurance and Control Plan and Safety Program. Means of measurements will pass or fail along with recommendations for fixes/improvements to ensure the project moves forward with minimal delays. Each of these checkpoints and associated gates will ensure JM Engineering's Quality Assurance Program is being implemented and followed properly along with guidance and oversight from the Quality Assurance Managers.

Customer Service Plan

Customer Service Department – JM Engineering’s Customer Service Department is managed by JM Engineering’s Operations Manager, Mr. Chad Liesman and day-to-day operations are handled by our HVAC Service Manager, Mr. Ron Holman. The typical office hours are from 7am to 3:30pm, Monday – Friday; however, we can modify our schedule to meet the County’s requirements. Furthermore, all our employees are available to work non-regular business hours, overtime, weekends and holidays as needed. JM Engineering’s Customer Service Department is run entirely by full-time, permanent JM Engineering employees – *no services are subcontracted out*. There are a total of 16 service technicians that support JM Engineering’s Customer Service Department including 24/7 on-call support.



After-Hours Customer Service – JM Engineering has been providing 24/7 on-call facility maintenance support which includes HVAC and electrical systems for many public agencies in the Central Texas area since 2014 with a 2-hour response time for emergency calls. All our technicians take their company vehicles home, carry Smartphones, HVAC tools and spare parts with them so they are always prepared and equipped to make after-hour calls.

Furthermore, regarding maintaining a telephone dispatch system for 24/7 on-call support, JM Engineering has multiple maintenance contracts requiring 24/7 on-call support services for Travis County, Hays County, City of Austin, Texas Department of Transportation, Texas Facilities Commission, Texas DPS, TCEQ, Texas Employee Retirement System and Resort Lifestyle Communities. We have numerous local technicians in Round Rock, Austin, Hutto, Taylor, Elgin and Buda that can provide 24/7 on-call support with a 2-hour response time for emergency calls.

Service Call Prioritization and Escalation – Service call prioritization and escalation depends on the customer’s requirements; however, JM Engineering typically assigns up to 4 priority levels to service calls which further defines their priority and escalation. A Priority 1 service call is an emergency service call that requires a 2-hour onsite response time on a 24/7 basis. A Priority 2 service call is also an emergency service call that requires a 6-hour onsite response time on a 24/7 basis. A Priority 3 service call requires a response time by the next business day and resolution within 7 calendar days. A Priority 4 service call requires a response time within 7 calendar days and resolution within 30 calendar days. All these prioritizations, response and resolutions times can be modified at the discretion of Williamson County.

At JM Engineering, all service calls get assigned to the service technician responsible for the customer and/or facility. The customer would contact the JM Engineering technician directly through his/her company Smartphone. The technician would then respond based on the priority of the service call. Each JM Engineering technician has the authority, training and experience to resolve each service call. If a part or material is not available, each JM Engineering technician has a company credit card to purchase parts at any supply house to complete the repair.

Furthermore, if the technician needs to escalate the service call, they have a procedure to follow to notify their Supervisor and if necessary, escalate to the Operations Manager and then Vice President if needed.

Capability to Service Multiple County Facilities – JM Engineering is very familiar with public agencies and their processes, permitting, sign in/out procedures, quote process, PO process and invoicing. With this successful experience, JM Engineering will already be ahead of the competition and able to respond to the County’s needs quicker, more efficiently and properly as expected.



Furthermore, JM Engineering’s personnel are full-time, permanent employees trained and licensed to provide HVAC maintenance and repair services. Our technicians are assigned to projects/customers and stay with them to project completion to ensure consistency of services to the customer and equipment familiarity.

JM Engineering will be able to meet project timelines by providing adequate staff to perform the job, having additional well-qualified and licensed technicians as back up and oversight by the Project Manager who is also co-owner of JM Engineering. As co-owner of the company, Mr. Weinberger will have the ability to shift resources to ensure project timelines are always met.

During certain times of the year, we expect multiple corrective maintenance service calls and, if needed, JM Engineering can provide additional technicians to assist the team in meeting our schedule on each service call. Our depth of local highly qualified and licensed technicians will allow JM Engineering to provide additional resources as needed to assist with troubleshooting and repairing difficult or major HVAC issues.

Reporting Documentation – All service calls, maintenance and repairs performed by JM Engineering are documented on a Service Ticket. A sample of the Service Ticket is provided in the Appendix at the end of this proposal. Prior to finishing the job and leaving the job site, JM Engineering completes the service ticket, has the customer sign or initial it and leaves a copy with the customer. Since the service ticket is a triplicate carbon copy, the second copy is provided back to the customer’s Project Manager and the last copy is filed and maintained by JM Engineering as project documentation. Sometimes at the discretion of the customer, JM Engineering can also provide electronic copies of the service tickets back to the customer’s Project Manager and/or as back up to the invoice.

Another form of project documentation is JM Engineering’s PM Checklist which is used to perform and document all preventative maintenance performed on each HVAC unit. A sample of JM Engineering’s PM Checklist is provided in the Appendix to illustrate the standard tasks

and checks that JM Engineering performs on all its HVAC preventative maintenance. This checklist can be modified at the County's discretion.

The key points of contact for JM Engineering are provided below. Additional information will be provided upon award of the contract and/or at the Kick-Off Meeting.

JM Engineering's Account Representatives:

- Name: Jay A. Weinberger, PE
- Title: Program Manager and QA/QC Manager
- Office Location: 1314 Hillridge Drive, Round Rock, Texas 78665
- Mailing Address: 1314 Hillridge Drive, Round Rock, Texas 78665
- Fax Number: 512-614-0226
- Email: jay@jm-engineer.com
- Office Phone: 512-614-0226
- Cell Phone: 512-550-6450

- Name: Chad Liesman
- Title: Operations Manager (HVAC Technical Expert)
- Office Location: 14800 ½ SB, N Mopac, Austin, Texas 78728
- Mailing Address: 1314 Hillridge Drive, Round Rock, Texas 78665
- Fax Number: 512-614-0226
- Email: chad.liesman@jm-engineer.com
- Office Phone: 512-874-9245
- Cell Phone: 512-966-3959

Service Request Information - Service request shall be placed via Phone or Email.

- Name: Ron Holman
- Title: HVAC Service Manager
- Office Location: 2013 Wells Branch Parkway, Suite 201, Austin, Texas 78728
- Mailing Address: 1314 Hillridge Drive, Round Rock, Texas 78665
- Fax Number: 512-614-0226
- Email: ron.holman@jm-engineer.com
- Cell Phone: 512-783-5065

Safety and Spill Plan

Safety is a top priority for JM Engineering and all its employees. Safety guidelines and procedures are provided through the company's Safety Manual, Monthly Safety Meetings, company issued PPE and annual company stipend for steel-toed boots for all employees. A copy

of JM Engineering's Safety Manual can be provided at the request of the County. Some additional information on JM Engineering's safety record is listed below:

1. JM Engineering has never had any OSHA exceptions or citations issued to the company;
2. JM Engineering's OSHA Recordable Incident Rate over the past two years is 3.5; and,
3. JM Engineering's current Safety Policies and Procedures concerning all employees, crews, and equipment proposed for the execution of this contract are contained in the company's Safety Manual which is reviewed through Safety Topics covered in our Monthly Safety Meetings with all employees.

Environmental Standards/Practices

The environmental impact of refrigeration is extremely important to JM Engineering. For this reason, all of JM Engineering's HVAC Technicians have Universal EPA Certifications, adhere to JM Engineering's Safety Manual and are required to complete refrigeration logs for any recovery or use of refrigeration on HVAC systems. On every job/service call, Technicians are required to complete a Service Ticket onsite prior to leaving the job site. On the back of each Service Ticket is a log that documents refrigeration use, leaks, recovery and unintentional venting. This log on the back page of each service ticket is filed and saved at our office for documentation purposes to meet OSHA requirements. A sample of JM Engineering's Service Ticket is provided in the Appendix at the end of this proposal.

JM Engineering's technicians are properly trained and licensed HVAC Technicians with Universal EPA certifications ensuring they know how to handle specialized tools and refrigeration while performing service calls, preventative maintenance tasks and system upgrades/installations. Furthermore, JM Engineering does not hire specialized labor only for the duration of each project. All of JM Engineering's staff are full-time, permanent employees. As the workload increases, JM Engineering hires additional qualified and licensed full-time, permanent employees to ensure we provide a safe, consistent and highly qualified level of service to all our customers.

Training Plan

JM Engineering provides a Personal Development Program for all employees that maintains their licenses, certifications and provides annual staff development and training. Depending on the employee's area of expertise and level of experience, JM Engineering ensures they attend annual training on HVAC technologies relevant to the projects and Customers they service.

Furthermore, JM Engineering also pays for all licenses, continuing education required for licenses and renewals. As part of JM Engineering's Safety Program, Quarterly Safety Meetings are held that require all employees to attend. These meetings cover OSHA safety topics, but also cover new technologies and continuing education.

Tools and Parts

JM Engineering has an extensive inventory of vehicles, trailers and tools to ensure we can respond quickly, repair almost any equipment failure and provide the services as required by the RFP. JM Engineering has 25 company vehicles, 5 trailers, oil water separator, air compressors and various power tools, IR camera, megohmmeter, manometer and over \$50,000 in specialized HVAC and electrical tools. Each Service Technician takes their company vehicle home and carries a Smartphone so they can quickly respond to service calls on a 24/7 basis. Furthermore, JM Engineering carries an extensive inventory of air filters, belts and HVAC replacement parts including capacitors, switches, contactors, etc. to ensure we can provide 24/7 service and repair.

Warranty

JM Engineering provides a standard one-year warranty for all parts and labor provided. If the manufacturer provides an extended warranty (i.e., 5-year warranty on a compressor), these warranties will be provided to the County.

Value Added Services

As an Engineering and facility maintenance company, JM Engineering brings over 20 years' experience in managing infrastructure for public agencies with fixed budgets and reduced resources. Based on this experience, JM Engineering will bring to the team fresh ideas to provide dynamic and proactive maintenance of the County's HVAC systems as well as find opportunities to save the County money, upgrade their infrastructure and improve the overall efficiency of the HVAC systems. Of course, all these value added services can be provided at the discretion of the County.

JM Engineering brings qualifications as a Texas licensed Professional Engineering company that can provide additional engineering services at the discretion of the County.

JM Engineering is also a TDLR licensed Electrical Contractor and an authorized Cummins, Kohler, Generac and Briggs & Stratton power generator sales, service and installation dealer that can provide warranty repairs, maintenance and installation services for all sizes and brands of generators.

To further highlight our qualifications, JM Engineering has provided the following two distinct advantages that separate us from the rest of the competition on this Request for Proposal:

1. JM Engineering is not a national chain or franchise service company, we are a local facility maintenance and engineering firm with highly qualified staff licensed in HVAC systems, electrical systems and electrical engineering. What this means to the County is that highly qualified staff will be assigned to the project at the start and will not change. We will ensure that the same technician that provides 24x7 on-call support will be performing the preventative maintenance. This ensures each technician is qualified and familiar with all HVAC systems in their building.

- Furthermore, the County will have direct contact with both owners (Jay and Melissa Weinberger) to ensure consistent and adequate resources are provided to fulfill the needs of Williamson County; and,
2. JM Engineering will perform all services in-house with licensed HVAC Technicians with Universal EPA certifications to ensure work is completed properly and safely; thus, maintaining a high level of performance, timely response and consistency on all maintenance and repair services.

Financial Capabilities

JM Engineering, LLC is in good financial standing and current in payment of all taxes and fees including state franchise fees. JM Engineering's Dun and Bradstreet Business Information Report can be provided at the request of the County.

JM Engineering also maintains a savings account valued at \$1,300,000 at the time of this proposal that are invested in Ultra Short Bond Funds (Class A) that are easily accessible if needed to financially assist the company. However, in the history of the company, JM Engineering has never had to access savings to cover business or operations. Copies of financial statements to demonstrate financial stability can be provided at the County's request.

APPENDIX

The following documents are included as required by the solicitation and to provide additional information in support of JM Engineering's proposal. Each section is provided as a separate attached file with the file name matching the list below.

- A. JME PM Checklist and Service Ticket
- B. JME Licenses and Certifications

CHECKLIST		
<input type="checkbox"/>	COMPRESSOR	
Suction _____	PSI	
Head _____	PSI	
Superheat _____	Degrees	
Subcooling _____	Degrees	
Oil Pressure _____	PSI	
RLA _____	Actual _____	
Volts _____	Phase _____	
<input type="checkbox"/>	Electrical Connections	
<input type="checkbox"/>	Contactors Tight & Clean	
<input type="checkbox"/>	Oil Level & Condition	
<input type="checkbox"/>	CONDENSER COIL	
<input type="checkbox"/>	Coil Clean & Fin Cond. OK	
ENT _____	F LVG _____ F	
<input type="checkbox"/>	EVAPORATOR COIL	
<input type="checkbox"/>	Coil Clean & Fin Cond. OK	
ENT _____	F LVG _____ F	
<input type="checkbox"/>	AIR FILTERS	
<input type="checkbox"/>	Cleaned _____ Replaced _____	
<input type="checkbox"/>	FAN & MOTOR	
RLA _____	Actual _____	
Volts _____	Phase _____	
<input type="checkbox"/>	Electrical Connections	
<input type="checkbox"/>	Contactors Tight & Clean	
<input type="checkbox"/>	Fan Pulleys (Adjust Belt)	
<input type="checkbox"/>	Check Bearings & Motor	
<input type="checkbox"/>	CONDENSATE AREAS	
<input type="checkbox"/>	Inspect & Clean Drain Pan	
<input type="checkbox"/>	Inspect & Clean Drain Line	
<input type="checkbox"/>	THERMOSTAT & CONTROLS	
<input type="checkbox"/>	Check, Inspect & Calibrate	
Setpoint Cool _____	Heat _____	
<input type="checkbox"/>	ELECTRIC HEATERS	
KW _____	RLA _____	Actual _____
Volts _____	Phase _____	
<input type="checkbox"/>	Electrical Connections	
<input type="checkbox"/>	Contactors & Controls OK	
<input type="checkbox"/>	CHILLER & BOILER TEMPS.	
CHWS _____	F CHWR _____	F
HWS _____	F HWR _____	F
CWS _____	F CWR _____	F
<input type="checkbox"/>	Panels Secured _____	
<input type="checkbox"/>	Outdoor Temp. _____	
<input type="checkbox"/>	Gas Pressure _____	W.C.
<input type="checkbox"/>	Heat Exchanger _____	
<input type="checkbox"/>	Disconnect ON _____	
<input type="checkbox"/>	Other _____	
<input type="checkbox"/>	Other _____	

Job No.: _____ Date: _____

CUSTOMER	
Customer (Company) Name: _____	
Location: _____	
Address _____	City _____ State _____ Zip _____
Contact: _____	
Name _____	Title _____ Telephone Number _____
UNIT	
Model No.: _____	Description: _____
Serial No.: _____	Refrigerant Type: _____
Location: _____	Design Refrigerant Charge: _____
Unit No.: _____	Truck # / Cylinder #: _____
LEAK IDENTIFICATION	
Leak Location and Description: _____	
Repaired: <input type="checkbox"/> Yes <input type="checkbox"/> No	Refrigerant Amount Used: _____
If No – Explain: _____	
Status: _____	
Comments: _____	

RECOVERY	
Equipment Used: _____	
Amount Recovered: _____	
Re-Installed: <input type="checkbox"/> Yes <input type="checkbox"/> No	
If No – Explain Disposition: _____	
UNINTENTIONAL VENTING	
Describe Situation: _____	
Corrective Action(s): _____	

Approximate Refrigerant Amount Verified _____	
CUSTOMER NOTIFICATION	
If deficiencies/discrepancies noted are not corrected, you may be in violation of federal/state clean air regulations.	Total Amount Refrigerant Used _____ Percent Design Charge _____ %
Comments: _____	
Service Representative: _____	
Date _____	
Acknowledged by: _____	
Customer Signature _____	Title _____ Date _____

HVAC Preventative Maintenance Checklist

Work Order No: _____
Address: _____

Unit Number: _____
Unit Make & Model: _____

Technician: _____
Date: _____

Activities to be Performed	Yes	No	N/A	Comments/Repairs Needed
Clean/wash condenser coils, if necessary. Were coils washed? Clean coils with biodegradable foaming cleaner, rinse and remove any debris from bottom of condensing unit.				
Clean/wash evaporator coils, if necessary. Were coils washed? Clean coils with self-rinsing foaming cleaner, clean out pan, wipe down fan blades and reseal housing.				
Clean drain pan and utilize condensate pan treatment tablets.				
Blow out drain line from unit to building drain.				
Check drive belt on air handler and replace if necessary. Was the belt replaced?				
Grease fan motor and blower shaft bearings.				
Check heater operation (turn on and verify operation)				
Gas Heat - check heater safeties and clean heat exchangers				
Electric Heat - check heater elements				
Check/replace air filters, if necessary. Were air filters replaced?				
Check sight glass for bubbles. Were any bubbles seen in the sight glass? If bubbles are seen in the sight glass, discuss this with Lead HVAC Technician or Manager.				
Verify that all Cushioned Clamps are in good condition, are properly installed, rubber insert is in good condition and clamping bolt is tight. Were any Cushioned Clamps tightened or replaced? If so, describe in comment section.				
Look for rust areas on unit, paying particular attention to sight glasses and liquid line driers. Brush lightly with small steel brush, then touch up with ZRC galvanize paint.				
Secure all unit panels before leaving job site. Are all panels secure and all screws in place?				
Put unit back into the normal operating mode before leaving job site. Is the unit in the normal operating mode?				
Clean area around units serviced (no trash). Is area around the unit clean?				

Filter Size	QTY	Belt Size	QTY

Additional Comments:

Service Representative: _____
Signature
Date

Acknowledged by Customer: _____
Signature
Date



TEXAS DEPARTMENT OF LICENSING & REGULATION

Texas Department of Licensing and Regulation Result Listing

Name and Location	Other Information
LIESMAN, MATTHEW CHAD JM ENGINEERING LLC County: WILLIAMSON No DBA found	Air Conditioning/Refrigeration Contractor License #: TACLA00036737C Expiration Date: 03/22/2024 Type: AC License Status: Active

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Distribution

9 August 2023

To Whom It May Concern,

CERTIFICATION

As of the date hereof, we hereby certify that JM Engineering, LLC, domiciled at 2013 Wells Branch Parkway Austin, Texas 78728 is an authorized Cummins Dealer for the Product(s), Service Level(s), and Market Application(s) identified in Schedule 1 attached hereto.

As a Dealer of the Product(s), the Company has the authority to sell, service, manage any warranty program, sign sales and service contracts, and render information with respect to the Product(s) as specified in Schedule 1.

Sincerely,

Kirby Barnett

Kirby Barnett

CSSNA Channel Readiness Leader



Distribution

Schedule 1

Products	Service Level	Market Application
HSB INSTALLATION	INSTALLATION	HOME AND SMALL BUSINESS
HSB REPAIR	REPAIR	HOME AND SMALL BUSINESS
HSB SALES	SALES	HOME AND SMALL BUSINESS

Generac Power Systems, Inc.
S45 W29290 Hwy. 59
PO Box 8
Waukesha, Wisconsin 53187
P (262) 544-4811
F (262) 544-1241



March 16, 2016

JM Engineering LLC.
1314 Hillridge Drive
Round Rock, TX 78665

Attn: Jay Weinberger,

Congratulations on becoming a Generac Service Dealer! Your dealer number is **11119319**. A copy of your signed service agreement is included in this packet for your records. As a new dealer with us, there are a few pieces of important information you will need. Please take a moment to read this letter in its entirety to ensure a positive experience as a new service dealer.

You should already have received a User ID and temporary password for our secure, dealer only website – GENservice. GENservice will be your source for the most up-to-date information going forward. Visit www.generac.com, click on the GENservice link at the bottom of the page and log in with your User ID and password. On GENservice you are also able to:

- Parts look-up, order parts, view order history, and process online returns
- Register/activate your products & file warranty claims
- Verify technician status & schedule factory/field training
- Download diagnostic & installation manuals
- Receive the latest Information Bulletins
- And much more!

As an authorized Generac Service Dealer your company name is now listed on our Dealer Locator *. Check out the residential/commercial service dealer locator at www.generac.com. (* Only if selected on your service agreement)

Included in this packet is a copy of the General Service Requirements Policy and General Service Policy. Please review all material to become familiar with our policies and procedures. The most up-to-date versions will be posted on GENservice under Documents/Service Documents/ Policy and Requirements.

To contact the Service Department – Service Dealers Only

Office Hours: Monday – Friday 8am to 5pm CST

Phone: 800-883-7535

Fax: 262-472-6515

****Always have your dealer number and serial number available!**

- **Option 1 for Parts** Email: rescomdealerparts@generac.com
 - Parts verification & questions
 - All orders must be placed on GENservice
- **Option 2 for Parts Service Support** Email: rescomdealerparts@generac.com
 - Parts order status, tracking of orders & order related questions
- **Option 3 for Service** Email: service@generac.com
 - Troubleshooting assistance & control numbers (refer to the General Service Policy)
- **Option 4 for Warranty** Email: warranty@generac.com
 - Registration/activation questions, warranty period, questions on claims
 - All warranty claims must be filed on GENservice

If you have any questions concerning your account or GENservice login issues, feel free to contact us at genservice@generac.com.

Thank you for your business!
Generac Service Operations Department

Jay Weinberger

From: Deric Gregg <dgregg@loftinequip.com>
Sent: Sunday, March 07, 2021 7:31 PM
To: Jay Weinberger
Cc: Deric Gregg
Subject: Kohler dealership

You guys are back in the Kohler system. You should get an email from Kohler shortly. Your Kohler dealer number is BP#3556949



Deric Gregg
Sales Manager

dgregg@loftinequip.com

o: (210) 881-1623 ex 402 | c: (210) 722-9546
loftinequip.com



ENERGY SOLUTIONS DEALER AGREEMENT

In accordance with all of the terms and conditions of this Dealer Agreement (the "*Agreement*"), the dealer identified above ("*Dealer*") wishes to obtain the rights to sell Seller's Products for the initial term of this Agreement and any renewals thereof, solely from the location(s) identified herein (each, a "*Location*").

Effective Date (mm-dd-yyyy)	08/23/2022	
Legal Name of Dealer	JM Engineering, LLC	
Dealer Principal Address (Street Address, city, state, zip code)	1314 Hillridge Drive, Round Rock, Texas 78665	
Place of Organization (State or country where the Dealer is registered)	Texas, USA	
Type of Entity	<input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input checked="" type="checkbox"/> LLC <input type="checkbox"/> Corporation Other _____	
Other Dealer Location(s)	2013 Wells Branch Parkway, Suite 117, Austin, Texas 78728	
Shipping Address	2013 Wells Branch Parkway, Suite 117, Austin, Texas 78728	
Seller's Principal Address	Briggs & Stratton, LLC a Delaware limited liability company 12301 W. Wirth Street Wauwatosa, WI 53222-0702	
Legal Notice Legal Notices must be sent to the Principal Address, unless a different address is specified in the Legal Notice section	For Buyer: 1314 Hillridge Drive, Round Rock, Texas 78665	For Seller: Legal Notices must be sent to the Seller's Principal Address and emailed to the generalcounsel@basco.com

Attachment B – Compensation and Fee Schedule

This attachment shall be completed and returned with the Contractor response. Failure to return this completed attachment will result in the disqualification of the response.

Contractor shall submit a Compensation and Fee Schedule with a full list of all personnel titles and the hourly billing rate for each discipline which shall be incorporated into its contract.

Rates shall remain firm throughout the term of this contract purchase agreement. This compensation and fee scheduled shall be used to establish fixed prices for services by purchase order.

After award and as individual projects are identified, awarded Contractor(s) will be requested to submit a fee proposal detailing the total fee for providing the Services for the specific project expressed as a “not to exceed” amount, the number of hours (by specialty in accordance with the approved fee schedule), and the total anticipated amount for reimbursable expenses. Contractor shall be responsible for all expenses associated with the work identified in the purchase order. (Labor, equipment, materials, travel, etc.). Final work order proposal, including all expenses for each individual work orders will be negotiated and approved at time of award of each work order and shall become a “fixed price” work order.

Personnel Level	Hourly Rate
1. Supervisor / Project Manager	\$ 109.00
2. HVAC Journeyman Technician	
a. Regular Hours (6 am – 6pm)	\$ 98.00
b. After Regular Hours (6:01 pm – 5:59 am)	\$ 121.00
c. Weekends or County approved Holidays	\$ 121.00
d. Emergency Response during Regular Hours (6 am – 6 pm)	\$ 121.00
e. Emergency Response after Regular Hours (6:01 pm – 5:50 am)	\$ 121.00
f. Emergency Response on Weekends or Approved Holidays	\$ 121.00
3. HVAC Apprentice Technician	
a. Regular Hours (6 am – 6pm)	\$ 72.86
b. After Regular Hours (6:01 pm – 5:59 am)	\$ 89.10
c. Weekends or County approved Holidays	\$ 89.10
d. Emergency Response during Regular Hours (6 am – 6 pm)	\$ 89.10
e. Emergency Response after Regular Hours (6:01 pm – 5:50 am)	\$ 89.10
f. Emergency Response on Weekends or Approved Holidays	\$ 89.10
4. Sheet Metal Journeyman Technician	
a. Regular Hours (6 am – 6pm)	\$ 71.08
b. After Regular Hours (6:01 pm – 5:59 am)	\$ 101.25
c. Weekends or County approved Holidays	\$ 101.25
d. Emergency Response during Regular Hours (6 am – 6 pm)	\$ 101.25
e. Emergency Response after Regular Hours (6:01 pm – 5:50 am)	\$ 101.25
f. Emergency Response on Weekends or Approved Holidays	\$ 101.25
5. Sheet Metal Apprentice Technician	
a. Regular Hours (6 am – 6pm)	\$ 51.28
b. After Regular Hours (6:01 pm – 5:59 am)	\$ 76.91
c. Weekends or County approved Holidays	\$ 76.91
d. Emergency Response during Regular Hours (6 am – 6 pm)	\$ 76.91
e. Emergency Response after Regular Hours (6:01 pm – 5:50 am)	\$ 76.91
f. Emergency Response on Weekends or Approved Holidays	\$ 76.91

24RFP30 - HVAC MAINTENANCE REPAIR SERVICES FOR WILLIAMSON COUNTY, TEXAS

Personnel Level	Hourly Rate
6. Pipe Fitter Technician	
a. Regular Hours (6 am – 6pm)	\$ 120.75
b. After Regular Hours (6:01 pm – 5:59 am)	\$ 241.50
c. Weekends or County approved Holidays	\$ 241.50
d. Emergency Response during Regular Hours (6 am – 6 pm)	\$ 120.75
e. Emergency Response after Regular Hours (6:01 pm – 5:50 am)	\$ 241.50
7. Other Technicians – Journeyman Electrician	
a. Regular Hours (6 am – 6pm)	\$ 87.84
b. After Regular Hours (6:01 pm – 5:59 am)	\$ 108.24
c. Weekends or County approved Holidays	\$ 108.24
d. Emergency Response during Regular Hours (6 am – 6 pm)	\$ 108.24
e. Emergency Response after Regular Hours (6:01 pm – 5:50 am)	\$ 108.24
f. Emergency Response on Weekends or Approved Holidays	\$ 108.24
g. Regular Hours (6 am – 6pm)	\$ 87.84

Emergency Contact Personnel:	On-Call Technician, Ron Holman, Chad Liesman, Jay Weinberger (in order of first to last contact)
Business Hours Phone Number:	512-924-6162 (On-Call Technician) 512-783-5065 (Ron Holman – Service Manager) 512-966-3959 (Chad Liesman – O&M Manager) 512-550-6450 (Jay Weinberger – Vice President)
After Hours/Emergency Phone Number:	512-924-6162 (On-Call Technician)
Email Address:	service@jm-engineer.com

Materials - Remedial Repairs	
Materials not covered under scheduled service:	
*	Contractor may invoice for parts and materials on a cost-plus basis. The contractor may invoice at <u>20</u> % markup.
**	Contractor may invoice for equipment rental on a cost-plus basis. The contractor may invoice at <u>15</u> % markup.
***	Invoice(s) for work performed shall require a copy of the parts and materials receipt to be included when the total, including mark-up, exceeds \$500.00.
****	Williamson County reserves the right to request from Contractor any documentation that reflects price for verification purposes.

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24RFP30 for Services Provided

Respondent to clearly mark each section and equipment for which qualified services can be provided by checking the appropriate box. Failure to return this exhibit may result in the response submission being considered non-responsive.

Service Provided	Provider		
HVAC and HVAC Maintenance	<input checked="" type="checkbox"/> Aaon	<input checked="" type="checkbox"/> Fujitsu	<input checked="" type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input checked="" type="checkbox"/> Goodman	<input checked="" type="checkbox"/> McQuay
	<input checked="" type="checkbox"/> Bard	<input checked="" type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input checked="" type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input checked="" type="checkbox"/> LG	<input checked="" type="checkbox"/> York
Insulation Services	<input checked="" type="checkbox"/> Aaon	<input checked="" type="checkbox"/> Fujitsu	<input checked="" type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input checked="" type="checkbox"/> Goodman	<input checked="" type="checkbox"/> McQuay
	<input checked="" type="checkbox"/> Bard	<input checked="" type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input checked="" type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input checked="" type="checkbox"/> LG	<input checked="" type="checkbox"/> York
A/C Compressor Repair/Replacement	<input checked="" type="checkbox"/> Aaon	<input checked="" type="checkbox"/> Fujitsu	<input checked="" type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input checked="" type="checkbox"/> Goodman	<input checked="" type="checkbox"/> McQuay
	<input checked="" type="checkbox"/> Bard	<input checked="" type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input checked="" type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input checked="" type="checkbox"/> LG	<input checked="" type="checkbox"/> York
UV Lights - Installation/Replacement	<input checked="" type="checkbox"/> Aaon	<input checked="" type="checkbox"/> Fujitsu	<input checked="" type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input checked="" type="checkbox"/> Goodman	<input checked="" type="checkbox"/> McQuay
	<input checked="" type="checkbox"/> Bard	<input checked="" type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input checked="" type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input checked="" type="checkbox"/> LG	<input checked="" type="checkbox"/> York
Air Compressor Repair	<input checked="" type="checkbox"/> Aaon	<input checked="" type="checkbox"/> Fujitsu	<input checked="" type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input checked="" type="checkbox"/> Goodman	<input checked="" type="checkbox"/> McQuay
	<input checked="" type="checkbox"/> Bard	<input checked="" type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input checked="" type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input checked="" type="checkbox"/> LG	<input checked="" type="checkbox"/> York
Pump Repair/Replacement	<input checked="" type="checkbox"/> Aaon	<input checked="" type="checkbox"/> Fujitsu	<input checked="" type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input checked="" type="checkbox"/> Goodman	<input checked="" type="checkbox"/> McQuay
	<input checked="" type="checkbox"/> Bard	<input checked="" type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input checked="" type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input checked="" type="checkbox"/> LG	<input checked="" type="checkbox"/> York
VRF Maintenance/Repair	<input type="checkbox"/> Aaon	<input type="checkbox"/> Fujitsu	<input type="checkbox"/> Mitsubishi
	<input type="checkbox"/> American Standard	<input type="checkbox"/> Goodman	<input type="checkbox"/> McQuay
	<input type="checkbox"/> Bard	<input type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input type="checkbox"/> Lennox	<input type="checkbox"/> Valent
	<input type="checkbox"/> Daikin	<input type="checkbox"/> LG	<input type="checkbox"/> York
AHU Maintenance/Repair	<input checked="" type="checkbox"/> Aaon	<input checked="" type="checkbox"/> Fujitsu	<input checked="" type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input checked="" type="checkbox"/> Goodman	<input checked="" type="checkbox"/> McQuay
	<input checked="" type="checkbox"/> Bard	<input checked="" type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input checked="" type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input checked="" type="checkbox"/> LG	<input checked="" type="checkbox"/> York
Compressor Maintenance/Repair	<input checked="" type="checkbox"/> Aaon	<input checked="" type="checkbox"/> Fujitsu	<input checked="" type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input checked="" type="checkbox"/> Goodman	<input checked="" type="checkbox"/> McQuay
	<input checked="" type="checkbox"/> Bard	<input checked="" type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input checked="" type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input checked="" type="checkbox"/> LG	<input checked="" type="checkbox"/> York
CRAC Unit Maintenance/Repair	<input checked="" type="checkbox"/> Aaon	<input type="checkbox"/> Fujitsu	<input checked="" type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input checked="" type="checkbox"/> Goodman	<input type="checkbox"/> McQuay
	<input type="checkbox"/> Bard	<input checked="" type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input checked="" type="checkbox"/> LG	<input checked="" type="checkbox"/> York
Centerifugal and Inline Pump Maintenance/Repair	<input checked="" type="checkbox"/> Aaon	<input checked="" type="checkbox"/> Fujitsu	<input checked="" type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input checked="" type="checkbox"/> Goodman	<input checked="" type="checkbox"/> McQuay
	<input checked="" type="checkbox"/> Bard	<input checked="" type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input checked="" type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input checked="" type="checkbox"/> LG	<input checked="" type="checkbox"/> York
Programming and Coding	<input checked="" type="checkbox"/> Aaon	<input type="checkbox"/> Fujitsu	<input type="checkbox"/> Mitsubishi
	<input checked="" type="checkbox"/> American Standard	<input type="checkbox"/> Goodman	<input checked="" type="checkbox"/> McQuay
	<input type="checkbox"/> Bard	<input type="checkbox"/> Innovent	<input checked="" type="checkbox"/> Trane
	<input checked="" type="checkbox"/> Carrier	<input checked="" type="checkbox"/> Lennox	<input type="checkbox"/> Valent
	<input checked="" type="checkbox"/> Daikin	<input type="checkbox"/> LG	<input type="checkbox"/> York