



## PROPOSAL REPORT COVER PAGE



Rick Bechtel  
**Associa Gulf Coast**

**RFP#:** 119916

**RFP Title:** Pool/Spa Heat Pumps  
Oak Hammock In The Brooks

## ABOUT THIS REPORT

Please review the following **Proposal Report** in its entirety. Once reviewed, please log into your free, online manager account and report your community's position on the matter within 15 days of close. Reporting the status or outcome of an RFP will instantly give all vendors, who worked diligently in providing a free estimate, the proper notification of where they stand.

## CLEANING UP THE MESS

This proposal report utilizes a patent-pending process to **centralize** all related bids for a more **consistent** format. The end result is less paperwork to manage and less time spent on making an informed decision.

## PROTECTING THE COMMUNITY

Each and every vendor who submitted a quote for this RFP has met, or exceeded your predetermined **minimum requirements** for liability insurance, worker's compensation, & licensing. Supporting documents (insurance policies, licenses, etc.) are provided in the proposal packet as part of this sealed bidding process. In addition, every vendor within this report has an **"apple rating"** that is based on the quality of their work and customer service with other communities. This should reduce the likelihood of hiring a "fly by night" contractor that may leave a project unfinished, completed poorly, and/or without warranty.

## UNDERSTANDING A VENDOR'S PRICE

Vendor pricing can vary greatly, even when compared **"apples-to-apples."** Some of the many reasons for varying quotes include: insurances, employee benefits, sales commissions, warranties, capital equipment, quality of workforce and materials, experience of estimators, and profit margin. By having multiple bids through a competitive, sealed bidding process, you have a better chance of a lower cost.

## STAYING ORGANIZED

Any information received through this software system will be saved for future reference and use. This includes pictures, proposals, scopes of work, and any other documents related to a proposal request. All can be retrieved by simply logging into your free online manager account.







**THIS IS NOT A SEALED BID. ALL PRICES WERE VISIBLE UPON BID SUBMISSION FROM VENDORS.**

**Pool/Spa Heat Pumps**  
**Oak Hammock In The Brooks | RFP #119916**

Industry Solicited: **Pool Installation, Repair & Restoration**  
Service Location: **Pool**

Closed On: **06-08-2012**  
Proposals Submitted: **4**  
Alt.Proposals Submitted: **1**

High Bid: **\$38,800.00**  
Low Bid : **\$18,680.00**  
Average Bid : **\$28,756.00**

DESCRIPTION	VENDOR 1	VENDOR 2	VENDOR 3
<b>Company Logo:</b>			
<b>Company Name:</b>	ClearWater Pools of Collier County, Inc.	COMMERCIAL POOL SPECIALIST, INC.	Symbiont Service Corporation
<b>Vendor Apple Rating:</b> (Based on customer surveys & vendor follow through)	 4 Out of 5	 4 Out of 5	 0.5 Out of 5
<b>Vendor Address:</b>	211 11th Street NW, Naples, Florida 34120	2206 ANDREA LANE - UNIT G, FORT MYERS, Florida 33912	4372 North Access Road, Englewood, Florida 34224
<b>Contact Name:</b>	Ronald Coulter	SCOTT CHAMBERS	Sandy King
<b>Office Number:</b>	(239) 352-3198	(239) 633-5624	(941) 474-9306
<b>Alt.Number:</b>	N/A	(239) 633-5230	(800) 881-4328
<b>Mobile Number:</b>	(239) 821-9038	(239) 633-5624	N/A
<b>Email Address:</b>	ron@cwpoools.net	CPSPECIALIST@COMCAST.NET	Onfile3@camassistant.com
<b>Business Established:</b>	1995	2008	1990
<b>General Liability:</b>	<b>\$2,000,000</b>	<b>\$2,000,000</b>	<b>\$0</b>
<b>Workers Comp. Policy?</b>	<b>Exemption Only**</b>	<b>Yes</b>	<b>No</b>
<b>In-House Vendor?</b> (Vendor affiliated with management company)	No	No	No
<b>TOTAL AMOUNT PROPOSED:</b>	<b>\$25,191.00</b>	<b>\$38,800.00</b>	<b>\$32,353.00</b>
<b>Alternate Proposal?</b>	<b>\$18,680.00</b>	<b>No</b>	<b>No</b>

\*\*\* A certificate of exemption from the state is on file, however there is no actual policy in place to protect the community from liability in the event that a subcontractor is injured on the job (including claims for lost wages)

### ITEMIZED PRICING BREAKDOWN

DESCRIPTION	VENDOR1	VENDOR2	VENDOR3
Company Logo:			
Company Name:	ClearWater Pools of Collier County, Inc.	COMMERCIAL POOL SPECIALIST, INC.	Symbiont Service Corporation
Line Item #1 Pricing: Pool/Spa Heat Pumps	<b>\$25,191.00</b>	<b>\$38,800.00</b>	<b>\$32,353.00</b>
Line Item #2 Pricing: Pool Cooling	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>TOTAL AMOUNT PROPOSED:</b>	<b>\$25,191.00</b>	<b>\$38,800.00</b>	<b>\$32,353.00</b>

## LINE ITEM #1: Pool/Spa Heat Pumps.

Pool & Spa Heat pumps -

Pool: Specify required equipment to maintain up to 80 degree F water in the pool during lowest winter temperatures and lowest local lake temperature.

Spa: Specify required equipment to maintain up to 110 degree F water in the Spa during lowest winter temperatures and lowest local lake temperature. NOTE: In operation there must be a settable limit for the Spa based on applicable regulations, usually 107 degrees or lower.

- 1) Install Heat Pumps on the pool and spa, to be linked with the lake for source water. Heat pump materials are to be corrosion resistant for 20 year service life expectancy: Typically titanium on the pool side, copper/bronze on fresh water lake side.
- 2) Equipment to be installed on new concrete slab or pads. Location to be approved by Board, and may require concealment depending on size/location.
- 3) Screen/sieve/filtration system for lake water to assure constant flow to all systems and prevent damage to equipment. Any servicing requirement should be easily accessible and serviceable.
- 4) Pump system for lake water.
- 5) All necessary trenching to lake water to be done with minimal disturbance to surrounding landscape. Fill and replace sod.
- 6) All Electrical to be included. Verify existing service and potential additional need.
- 7) Permit and other fees are to be included in pricing.
- 8) Clearly specify whether the system is to be reversible for cooling the pool in summer. If not included, specify up-charge for this capability.
- 9) Provide complete site cleanup.

**File(s) Provided to Vendors: None**

ClearWater Pools of Collier County, Inc.:	LINE ITEM PRICE: \$ 25,191.00
<b>NOTES:</b> 1) ClearWater Pools, Inc proposes to install two (2) WSO5 AquaCal Heat Pumps (water source) to take and return water to the nearest lake, to meet the pool heat and cool needs. Also, we will install one (1) WS03 AquaCal Heat Pump for the required heating of the Spa that will use the pool as it water source. 2) A 12 foot by 4 foot concrete pad will be poured at the location of the present heater for the new equipment 3) Piping from the lake will be connected with a threaded connector for easy access to the screen/sieve at the end of the pipe in the lake. A nylon mesh box will incase the lake end of the pipe. Also, an in-line filter (like irrigation filter) will be installed on the line ahead of the well pump from the lake. 4) A 1hp GT-10 irrigation type pump/motor will be installed to bring water to the Heat Pumps w/check valve. 5) Trenching and all new piping will be included, with necessary valves for control of flow, including a by-pass of the heat pumps for future mantaince issues. 6) All new breakers to be installed, and necessary disconnects and all new wiring in sealtite and bond wires included 7) Permits are not required for changing existing equipment 8) System is reversable at no extra cost. 9) Ditch digging and refilling and sod cover is included, as well as general clean up of work site. Payment schedule required: 50% upon signing contract. Balance due upon completion and your inspection. Ron Coulter, Owner, ClearWater Pool, Inc. All work is warranted for one (1) year. All equipment (Heat Pumps and Lake Pump) are warranted by manufacturer; as specified by their product brochures. References: References of Installations in your general area include: Saga Point in CopperLeaf - major Heat Pump and Salt Chlorine installation - waterfall system seperation to meet flow needs StreamSide @ SpringRun - Hot and Cool Heat pump installation Hidden Lakes @ SpringRun -Waterfall separation system for better flow - Heat Pump and Spa Heat installation Autumn Lake @ SpringRun -Heat and Cool Heat Pump installation All the above association presidents may be contacted via, Ms. Mickey Sudut , IPM Mtg - 963-5265	
<b>EXCEPTION(S): NONE</b>	

COMMERCIAL POOL SPECIALIST, INC.:	LINE ITEM PRICE: \$ 38,800.00
<b>NOTES:</b> 1) GEOTHERMAL UNITS MANUFACTURED BY AQUACAL, INC. 2) ALL GEOTHERMAL UNITS ARE SINGLE PHASE FOR POOL AND SPA 3) SYSTEM IS PREFABRICATED & PREWIRED ON AN ALUMINUM RACK AT OUR SHOP RATHER THAN IN FIELD TO ENSURE BETTER ACCURACY AND CONTROL OVER GLUE JOINTS SINCE 20 YEAR LIFE IS ANTICIPATED FOR SYSTEM. 4) HEATING SYSTEM MAY BE RENTED AT A RATE OF ~\$925.00 PER MONTH OVER 5 YEAR TERMS. ALL SERVICE AND MAINTENANCE INCLUDED IN RENTAL AGREEMENT.	
<b>EXCEPTION(S): NONE</b>	

Symbiont Service Corporation:	LINE ITEM PRICE: \$ 32,353.00
<b>NOTES:</b> 4 Symbiont Model PH-090-T-RV Geo-Thermal Pool HeaUCool Units Source Water: Lake Water 1 72 GPM Pump Installation Lake water trenching, piping, backfill & poured concrete pad. Electric; Use existing heater circuits located in 200 amp main lug panel outside clubhouse building for above equipment. Install new 40 amp circuit from 600 amp main distdbuton panel lake pump, if adequate.	
<b>EXCEPTION(S): NONE</b>	
<b>ATTACHMENT(S):</b> 2668_001.pdf	

**LINE ITEM #2: Pool Cooling.**

If there is an up-charge for cooling capability, specify here. Otherwise enter 0 (zero).

**File(s) Provided to Vendors: None**

<b>ClearWater Pools of Collier County, Inc.:</b>	<b>LINE ITEM PRICE: \$ 0.00</b>
<b>NOTES:</b> Included	
<b>EXCEPTION(S):</b> NONE	

<b>COMMERCIAL POOL SPECIALIST, INC.:</b>	<b>LINE ITEM PRICE: \$ 0.00</b>
<b>NOTES:</b> NO ADDITIONAL COST FOR COOLNG	
<b>EXCEPTION(S):</b> NONE	

<b>Symbiont Service Corporation:</b>	<b>LINE ITEM PRICE: \$ 0.00</b>
<b>NOTES:</b> n/a	
<b>EXCEPTION(S):</b> NONE	

## GENERAL NOTES & WARRANTY:

### ClearWater Pools of Collier County, Inc.:

**GENERAL NOTES:**

NONE

**WARRANTY:**

Please see exceptions on bid.

**ATTACHMENT(S):** No Files

### COMMERCIAL POOL SPECIALIST, INC.:

**GENERAL NOTES:**

WE WILL PROVIDE ALL INSURANCES AND LICENSES UPON REQUEST

**WARRANTY:**

7 YEARS PARTS & 5 YEARS LABOR ON GEOTHERMAL UNITS AND PVC PLUMBING - 1 YEAR ON OTHER SYSTEMS. 7 YEARS "BUMPER-TO-BUMPER" WARRANTY IS AVAILABLE IF WE PROVIDE COMPETITIVE PRICED POOL SERVICE MAINTENANCE ON POOL & SPA.

**ATTACHMENT(S):** No Files

### Symbiont Service Corporation:

**GENERAL NOTES:**

NONE

**WARRANTY:**

One year Symbiont Service Corp. all parts and labor on the installation. Five year manufacturer's labor on the Symbiont units. Seven year manufacturer's all parts only on the Symbiont units. Lifetime parts on titanium tube portion of the condenser heat exchanger.

**ATTACHMENT(S):** No Files

## SPECIAL REQUIREMENTS -- Vendors meet the following requirements:

### MINIMUM ESTABLISHED REQUIREMENTS:

General Liability

Minimum Liability Insurance Amount Required: **Not Specified**

Property Association MUST Be Listed As An "Additional Insured"

Management Company MUST Be Listed As An "Additional Insured"

#### ClearWater Pools of Collier County, Inc.:

Professional License: [RP0067030.pdf](#)

General Liability Insurance: [GL-2012.pdf](#)

Workers Comp Insurance: [WC\\_Exempt\\_3-8-13.pdf](#)

W-9: [W9-Clearwater.pdf](#)

#### COMMERCIAL POOL SPECIALIST, INC.:

Occupational License: [If\\_Awarded\\_and\\_if\\_Required\\_by\\_Jurisdiction.pdf](#)

Professional License: [CPC1457029\\_Exp8-31-14.pdf](#)

General Liability Insurance: [COI\\_GL\\_Exp9-15-13.pdf](#)

Workers Comp Insurance: [WC-COI\\_CPS\\_Exp1-1-14.pdf](#)

W-9: [W9\\_FORM.pdf](#)

#### Symbiont Service Corporation:

General Liability Insurance: [Materials\\_on\\_file\\_with\\_Property\\_Manager\\_or\\_Association.pdf](#)

W-9: [Materials\\_on\\_file\\_with\\_Property\\_Manager\\_or\\_Association.pdf](#)

**Pool/Spa Heat Pumps**  
**Oak Hammock In The Brooks | RFP #119916**

Industry Solicited: **Pool Installation, Repair & Restoration**  
Service Location: **Pool**

Closed On: **06-08-2012**  
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Alt.Proposals Submitted: **1**


High Bid: **\$38,800.00**  
Low Bid : **\$18,680.00**  
Average Bid : **\$28,756.00**

DESCRIPTION	VENDOR 1
<b>Company Logo:</b>	
<b>Company Name:</b>	ClearWater Pools of Collier County, Inc.
<b>Vendor Apple Rating:</b> (Based on customer surveys & vendor follow through)	 4 Out of 5
<b>Vendor Address:</b>	211 11th Street NW, Naples, Florida 34120
<b>Contact Name:</b>	Ronald Coulter
<b>Office Number:</b>	(239) 352-3198
<b>Alt.Number:</b>	N/A
<b>Mobile Number:</b>	(239) 821-9038
<b>Email Address:</b>	ron@cw pools.net
<b>Business Established:</b>	1995
<b>General Liability:</b>	<b>\$2,000,000</b>
<b>Workers Comp. Policy?</b>	<b>Exemption Only**</b>
<b>In-House Vendor?</b> (Vendor affiliated with management company)	No
<b>TOTAL AMOUNT PROPOSED:</b>	<b>\$18,680.00</b>
<b>Alternate Proposal?</b>	<b>\$18,680.00</b>

\*\*\* A certificate of exemption from the state is on file, however there is no actual policy in place to protect the community from liability in the event that a subcontractor is injured on the job (including claims for lost wages)



### ITEMIZED PRICING BREAKDOWN

DESCRIPTION	VENDOR1
Company Logo:	
Company Name:	ClearWater Pools of Collier County, Inc.
Line Item #1 Pricing: Pool/Spa Heat Pumps	<b>\$18,680.00</b>
Line Item #2 Pricing: Pool Cooling	<b>\$0.00</b>
<b>TOTAL AMOUNT PROPOSED:</b>	<b>\$18,680.00</b>

## LINE ITEM #1: Pool/Spa Heat Pumps.

Pool & Spa Heat pumps -

Pool: Specify required equipment to maintain up to 80 degree F water in the pool during lowest winter temperatures and lowest local lake temperature.

Spa: Specify required equipment to maintain up to 110 degree F water in the Spa during lowest winter temperatures and lowest local lake temperature. NOTE: In operation there must be a settable limit for the Spa based on applicable regulations, usually 107 degrees or lower.

- 1) Install Heat Pumps on the pool and spa, to be linked with the lake for source water. Heat pump materials are to be corrosion resistant for 20 year service life expectancy: Typically titanium on the pool side, copper/bronze on fresh water lake side.
- 2) Equipment to be installed on new concrete slab or pads. Location to be approved by Board, and may require concealment depending on size/location.
- 3) Screen/sieve/filtration system for lake water to assure constant flow to all systems and prevent damage to equipment. Any servicing requirement should be easily accessible and serviceable.
- 4) Pump system for lake water.
- 5) All necessary trenching to lake water to be done with minimal disturbance to surrounding landscape. Fill and replace sod.
- 6) All Electrical to be included. Verify existing service and potential additional need.
- 7) Permit and other fees are to be included in pricing.
- 8) Clearly specify whether the system is to be reversible for cooling the pool in summer. If not included, specify up-charge for this capability.
- 9) Provide complete site cleanup.

**File(s) Provided to Vendors: None**

**ClearWater Pools of Collier County, Inc.:**

**LINE ITEM PRICE: \$ 18,680.00**

**NOTES:** Alternate Pool and Spa Heat/Cool solution: New Effective Air Source Heat Pumps from AquaCal SuperQuiets. These Heat Pumps pull heat from the air with temperatures as low as 32\* F. 1) ClearWater Pools, Inc proposes to install two (2) SQ156 AquaCal Heat Pumps (water source), to meet the pool heat and cool needs. (no need for pump or pipe or strainer traps in/to the lake water.) Also, we will install one (1) SQ120 AquaCal Heat Pump for the required heating of the Spa 2) A 12 foot by 4 foot concrete pad will be poured at the location of the present heater for the new equipment 3) No Piping from the lake will be required 4) No Lake water source pump will be required. 5) New piping will be included, with necessary valves for control of flow, including a by-pass of the heat pumps for future maintenance issues. 6) All new breakers to be installed, and necessary disconnects and all new wiring in sealite and bond wires included 7) Permits are not required for changing existing equipment 8) System is reversible Hot or Cool or Both, at no extra cost. 9) No Ditch digging and refilling and sod cover needed. However, general clean up of work site is included. Payment schedule required: 50% upon signing contract. Balance due upon completion and your inspection. Ron Coulter, Owner, ClearWater Pool, Inc. All work is warranted for one (1) year. All equipment (Heat Pumps and Lake Pump) are warranted by manufacturer; as specified by their product brochures. References: References of Installations in your general area include: We have the above described system at all of the site list below, near your site. They have been extremely satisfied with pool heating. There is a great cost saving on installation. Saga Point in CopperLeaf - major Heat Pump and Salt Chlorine installation - waterfall system separation to meet flow needs StreamSide @ SpringRun - Hot and Cool Heat pump installation Hidden Lakes @ SpringRun -Waterfall separation system for better flow - Heat Pump and Spa Heat installation Autumn Lake @ SpringRun -Heat and Cool Heat Pump installation All the above association presidents may be contacted via, Ms. Mickey Sudut , IPM Mtg - 963-5265

**EXCEPTION(S): NONE**

**LINE ITEM #2: Pool Cooling.**

If there is an up-charge for cooling capability, specify here. Otherwise enter 0 (zero).

**File(s) Provided to Vendors: None**

ClearWater Pools of Collier County, Inc.:	LINE ITEM PRICE: \$ 0.00
<b>NOTES:</b> Included	
<b>EXCEPTION(S): NONE</b>	

## GENERAL NOTES & WARRANTY:

ClearWater Pools of Collier County, Inc.:

**GENERAL NOTES:**

NONE

**WARRANTY:**

Please see exceptions on bid.

**ATTACHMENT(S):** No Files