



Helm



RFP RESPONSE

WHITEWATER AQUATIC FITNESS CENTER- HVAC SYSTEM UPGRADE PROJECT

DATED: 09/06/2024

Proposal By

The Helm Group

Office:

S84 W18852 Enterprise Drive
Muskego, WI 53150

Andrea Fasciano

(414) 343-9222

afasciano@helmgroupp.com

Service Account Manager

Aaron Spray

815-238-1030

aspray@helmgroupp.com

Project Sales Engineer

helmgroupp.com

September 6th 2024

City of Whitewater
 Clerks office
 312 W. Whitewater St
 Whitewater Wisconsin 53190

Re: Whitewater Aquatic Center HVAC Bid Proposal

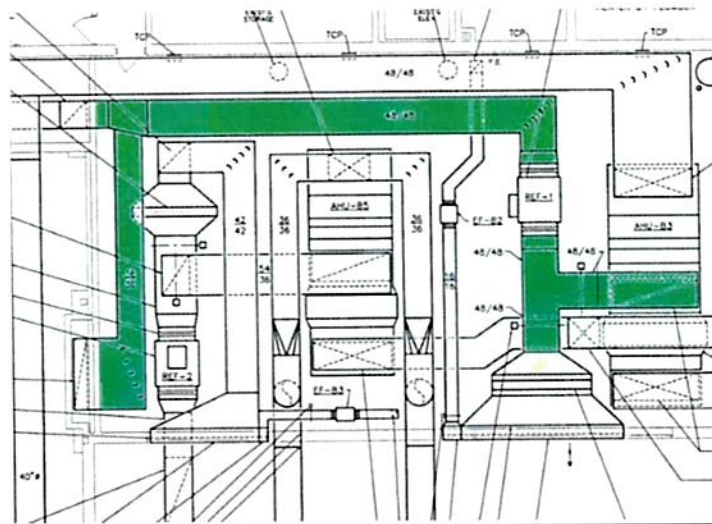
Helm Service would like to thank you for the opportunity to provide this proposal for your consideration. Partnering with Helm Service for this work will ensure you are receiving the highest technical expertise in our industry. Our mechanical service procedures promote the highest safety and environmentally conscious practices available.

► **Proposed project #1 HVAC and Piping Bid**

- Remove (2) Heating Coils and replace with OEM new coils specific to the existing B-3 AHU unit
- Remove (1) Reclaim Coil and replace with OEM new coils
- All coils to be coated with heresite coating for chemical resistant environment
- All coil replacement includes drain down disconnection and re-connection with insulation on piping
- Remove and replace (2) old actuated dampers with new stainless steel damper assemblies
- Remove all rusted ducting serving AHU B-3 and replace with Poly coated Ducting and insulation
- Ducting to be replaced colored green in the attachment accompanying this proposal
- Demolition of existing ducting to include electrical conduit work, moving for access to ducting
- Demo and loading new ducting may involve a crane to set materials on the roof
- Demo may also include removing the larger wall louvers for access to the mechanical room
- Removal of the louvers will allow for larger sections of ducting to be brought into the area.
- Labor and material are included for this scope of work as described above
- Clean up and replacement of all louvers removed is also included in proposal pricing
- Note: Controls portion of the proposal appears in Proposed Project #2 below

☐ ► Total for Project Proposal #1 as per scope above Ducting Work(No Tax Included).....\$145,925.00

☐ ► Total for Project Proposal #1 as per scope above Piping Work(No Tax Included)\$122,412.00



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► **Project Proposal #2 Control Replacement for Aquatics Center BAS**

- Per the scope of the RFP as shown in II)A)3, we propose the following:
- Remove and dispose of existing obsolete and proprietary HVAC controls.
- Provide and install new JACE-9000 Supervisory Controller
- Provide and install new BACnet Router.
- Provide and install new open protocol BACnet boiler plant controller.
- Provide and install new open protocol BACnet controllers for two large AHUs.
- Provide and install a new open protocol BACnet controller for the pool heat exchanger.
- Provide and install new sensors, devices, low voltage wiring, and communication wires where needed.
- Provide labor for custom programming for the controllers.
- Provide labor to perform a controls checkout and commissioning of the new system.
- Once Checkout is complete, provide owner training
- Once owner training is complete, provide three copies of a complete system backup, including all source code as implemented on the JACE and the equipment controllers. Implement automatic backups to City Server if possible, and configure one set of user credential at administrator level for the customer, providing access to the entire system as installed to the customer.

☐► **Total for Proposed Project #2 DEMO.....(No Tax Included).....\$ 55,549.00**

Sequence of Time line for Installation and Coil Replacement

- Timeline dependent on Coil delivery and lead time from the factory
- Reception of the Coils
- Removal of existing coils and stage old coils on roof for crane to remove and set new coils for installation
- Once coils are installed all connections will be made
- Insulation on the newly installed coils will be completed
- Insulation of coils includes repairs to the access doors of the reclaim coils and main AHU coils
- This process could take 7 to 9 days start to finish

Sequence of Timeline on Ducting Removal and Replacement

- Shut down system as needed
- Disconnect and Remove the existing 48”X48” Dampers on AHU B-3
- Remove Dampers and discard
- Furnish and install New Stainless Steel dampers as per RFQ
- Reconnect all power wiring and actuators for normal usage and return the dampers to service
- Disconnect existing ducting and remove from current location
- Methods of removal of ducting will vary(i.e cut up pieces for removal or stage on roof for crane to remove
- All discarded materials will be removed from site
- Furnish and install new PCD duct as per the RFQ
- All ducting will be reconnected to the existing ducting accessories and locations
- Fitting for new PCD duct include square to round transitions and vibration collars where required
- Once all ducting has been replaced we will insulate the outside of the ducting with a 1.5 foil back insulation
- Time line for Ducting , Coil Replacement and Controls may take place simultaneously depending on reception of materials and equipment
- Estimated time for Ducting installation start to finish approximately 16 working days

Note: These are estimated Timelines from a proposal stand point , actual delivery of equipment and materials will take precedence in the scheduling and completion of this project .



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S84 W18852 Enterprise Drive
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(262) 798-8003

Sequence Time-line for Controls Work and installation

Prior to Job Start:

Meet with City and Site staff to identify areas of concern and develop a plan that minimizes downtime and maximizes comfort for all involved. Develop programs for new controllers per sequence as shown on original documentation. Coordinate and take delivery of all new components so that all materials are in hand prior to job start. Coordinate necessary network connection with City IT staff.

Week One:

Monday:

Label all Low Voltage wiring for removal and re-termination to new controllers. Verify points compatibility in the field. Pull new BACnet communication trunk on preplanned route. Coordinate and walk through job with Helm personnel and site staff.

Tuesday:

Install and commission new JACE on City network. Begin recontrol of first controller, complete by afternoon. Restart controller and associated equipment.

Wednesday:

Verify proper operation of Controller 1, begin integration of it into JACE database. Begin construction of graphical interface.

Thursday:

Recontrol second controller, complete by afternoon. Restart controller and associated equipment. Continue graphics development and integration.

Friday:

Commission replaced controllers, verify all operations, and leave system in steady state.

Week Two:

Monday:

Recontrol third controller, complete by afternoon. Restart controller and associated equipment. Continue graphics development and integration.

Tuesday:

Recontrol fourth controller, complete by afternoon. Restart controller and associated equipment. Continue graphics development and integration.

Wednesday:

Complete graphics and integration, commission all devices.

Thursday:

Verify proper operation of system, owner training.

Friday:

Resolution of any owner requests, final checkout of system, turn over to owner

Lead Time on Equipment: 12 to 14 Weeks



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Clarifications:

- Please note –We are not responsible for delays in equipment/material deliveries due to COVID-19. With current environment, pricing is subject to change pending any equipment cost increases.
- Work to be performed during normal working hours of 7:00am thru 3:30pm, Monday thru Friday.
- *This proposal, scope, and price is the proprietary property of Helm Service and is for our Client's use only, as it is to be utilized for the agreement evaluation.* This Agreement sets forth all of the terms and conditions binding upon the parties hereto; and no person has authority to make any claim, representation, promise or condition on behalf of Helm Service, which is not expressed herein. No party shall alter this agreement. This proposal will become a binding Agreement only after acceptance by Client and approval by an officer of Helm Service as evidenced by their signatures below. All rights to any designs presented are retained by Helm Service.
- Proposal valid for 30 days.

Exclusions:

- The scope of this proposal does not include the replacement of any other components of the mechanical or controls systems that are not specifically listed in this proposal.
- Temporary HVAC equipment or rental equipment.
- Permits, Inspection fees of any kind.
- Isolation valves, strainers, check valves, etc. unless specifically noted.
- Electrical work of any kind, starters, disconnects, VFD's wire, conduit, breakers, fuses, etc. Unless noted above.
- Roofing, cutting, patching, flashing, painting.
- All work associated with Fire/Life Safety, including interfaces and interlocks to the Fire Alarm System, smoke detectors, fire dampers, smoke control dampers, and smoke/fire dampers.
- Structural building/walls; cutting, patching, and coring.
- Payment and performance bonds.
- All responsibility for Lead and asbestos identification, abatement, removal, and disposal prior to start of job.

Thank you for the opportunity. We look forward to working with you.

Andrea Fasciano
Service Account Manager
Helm Service Division
Cell 414-343-9222
AFasciano@helmgroupp.com

Aaron Spray
Project Sales Engineer
Helm Service Division
Cell 815-238-1030
ASpray@helmgroupp.com

Date

Signature of Authorization to proceed with selected scope above



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CONTRACT AGREEMENT - TERMS AND CONDITIONS

1. TERMS: IF THIS CONTRACT INVOLVES THE PURCHASE OF MATERIALS AND EQUIPMENT ONLY, THE PURCHASE PRICE SHALL BE PAYABLE AT THE TIME OF DELIVERY OF THE MATERIALS AND/OR EQUIPMENT; IF THIS CONTRACT INVOLVES LABOR OR LABOR AND MATERIALS AND EQUIPMENT, PROGRESS BILLINGS WILL BE SUBMITTED COVERING MATERIALS AND EQUIPMENT DELIVERED TO THE JOB SITE OR STORED IN ACCEPTABLE STORAGE FOR DELIVERY TO THE JOB SITE. THIS PROGRESS BILLING WILL ALSO INCLUDE LABOR WHICH HAS BEEN EXPENDED ON THE JOB OR DIRECTLY CONCERNED WITH THE JOB. THIS PROGRESS BILLING AMOUNT WILL BE DUE TEN DAYS AFTER BILLING DATE. FOR JOBS WHICH REQUIRE RETENTION, A RETENTION AMOUNT OF FIVE PERCENT WILL BE WITHHELD. IT WILL BECOME DUE AND PAYABLE AT THE COMPLETION OF HELM SERVICE'S PORTION OF THE PROJECT.
2. Title to the materials and equipment shall remain with Helm Service. until the customer has paid the total price in full, and if the customer should fail to make any payment to Helm Service. as the same becomes due or the customer fails to perform any other obligation under this contract, Helm Service may take possession of the materials and equipment and take whatever other action it deems appropriate.
3. Helm Service. warrants that its labor and installation shall be done in a good and workmanlike manner and shall be free from defects for a period of **one year** after completion of the installation. Helm Service warrants that all equipment and materials furnished will be new unless otherwise specified in this contract, and that Helm Service has good title thereto. Helm Service does not warrant the quality of the equipment and materials furnished in any respect and the customer's remedy for defects in the equipment and materials shall be against Helm Service's suppliers or the manufacturers of the materials and equipment. Helm Service will deliver all manufacturers' written warranties to the customer upon completion of installation. UNDER NO CIRCUMSTANCES WILL HELM SERVICE BE RESPONSIBLE FOR LOSS OF USE, LOSS OF PROFITS, INCREASED OPERATING OR MAINTENANCE EXPENSE, CLAIMS OF CUSTOMER'S, TENANTS, OR CLIENTS, OR ANY SPECIAL, INDIRECT OR CONSEQUENTIAL DAMAGES.
4. Once the equipment and materials have been delivered to the job site, the Customer assumes all risk of damage to same, by any cause, except that brought about by the negligence of Helm Service and its employees. The customer shall carry all Risk, Property Insurance to the full value of the materials and equipment and name Helm Service as an Additional Insured to the extent of its interest.

The Customer shall be responsible for purchasing and maintaining such liability insurance as will protect him against claims which may arise from operations under the Contract. The Customer must provide Helm Service a Certificate of Insurance providing General Comprehensive and Independent Contractors Liability with minimum limits of 500,000.00 per occurrence for Bodily Injury and Property Damage.
5. Helm Service will obtain Liability and Workers' Compensation Insurance protecting it against claims which may arise from operations under the contract.
6. Helm Service will make delivery or installation, when provided herein, within a reasonable time after this contract is entered into, but it will not be responsible for delays caused by unavailability of machinery, equipment, materials or parts, shipper's delays, strikes, lockouts, restrictions imposed by civil or military authority, priority regulation of some governmental body, insurrection or riot, or any other cause beyond Helm Service's control. If a time for performance is stated in this agreement, it shall be deemed to be an estimate only.

If Helm Service is required to make some installation under this contract, the customer shall be responsible for putting the premises in a satisfactory condition including furnishing electric power, light, heat, and water so that installation can start promptly and be completed efficiently.
7. If Helm Service shall fail to perform any of its obligations under this contract and fails to perform after the customer gives Helm Service ten (10) days' written notice of the specific deficiencies, the customer may have someone else complete the performance, but Helm Service's liability shall be limited to what it reasonably costs



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the customer to obtain completion of Helm Service's obligations under this contract. If Helm Service fails to perform any of its obligations under this contract, the customer, at customer's option, and without being required to do so, may cancel this contract by giving Helm Service ten (10) days written notice.

- 8. If the Project is stopped for a period of thirty (30) days under an order of any court or other public authority having jurisdiction, or as a result of an act of government, such as a declaration of a national emergency making materials unavailable, through no act or fault of Helm Service or if the Project should be stopped for a period of thirty (30) days by Helm Service for the customer's failure to make payment thereon as provided in Paragraph 1, then Helm Service may upon seven (7) days written notice to the customer terminate this agreement and immediately recover from the customer payment for all work to date and for any proven loss sustained upon any materials, equipment, tools, construction equipment and machinery, including reasonable profit and damages.
- 9. In the event either party must commence a legal action in order to enforce any rights under this contract, the successful party shall be entitled to all court costs and reasonable attorney's fees as determined by the court for prosecuting or defending the claim as the case might be.
- 10. The Customer shall not leave any of the equipment or systems furnished or installed by Helm Service. in operation until the customer has approved and accepted same and paid Helm Service the price in full.
- 11. Any written notice required under this contract may be delivered personally to the other party or mailed as certified mail, return receipt requested, to the other party's address as it appears in this agreement or as given to the other party by written notice during the terms of this contract.
- 12. To the fullest extent permitted by law, Customer shall indemnify and hold harmless Helm Service, its agents and employees from and against all claims, damages, losses and expenses, including but not limited to attorney's fees, arising out of or resulting from the performance of work hereunder, provided that such claim, damage, loss or expense is caused in whole or in part by any active or passive act or omission of Customer, anyone directly or indirectly employed by Customer, or anyone for whose acts Customer may be liable, regardless of whether it is caused in part by the negligence of Helm Service.

Initials _____

Date _____

*** Please Return Initialed Document with Proposal To Helm Service**



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September 6, 2024

City of Whitewater RFP Response

We are pleased to submit our proposal in response to the Request for Proposals issued for Whitewater Aquatic and Fitness Center- HVAC System Upgrade Project. Our team is enthusiastic about the opportunity to collaborate with the City of Whitewater to help upgrade the Whitewater Aquatic and Fitness Center's HVAC system

At the Helm Group, we have a robust track record in delivering high-quality design/build services that meet and exceed client expectations. We understand the strategic importance of this project and the role it plays in setting new benchmarks for airflow and efficiency.


We look forward to the opportunity to discuss our proposal in further detail and to explore how we can contribute to the success of this project. Please do not hesitate to contact us at (414) 343-9222 or (815)-238-1030. You can also contact us via email at afasciano@helmgroupp.com or aspray@helmgroupp.com if you require any additional information.

Thank you for considering our proposal. We are excited about the prospect of working together to create a more sustainable and energy-efficient future.

Andrea Fasciano
Service Account Manager
Helm Service
414-343-9222 cell

Aaron Spray
Project Sales Engineer
Helm Service
815-238-1030 cell

Helmgroupp.com

 Phone
414.343.9222
815-238-1030

 Email
afasciano@helmgroupp.com
aspray@helmgroupp.com

 Website
www.helmgroupp.com




September 6, 2024

Company Overview:

Based in Northern Illinois, Helm opened its doors in 1946 and provides construction services in the mechanical, plumbing, electrical, technology, structural, and civil markets in the Midwestern United States and beyond. Helm's mechanical division consistently ranks as one of the top 50 mechanical construction firms in the United States and was recently recognized by PM Magazine as 2020 Contractor of the Year and ENR Midwest Magazine's 2022 Top Specialty Contractor. Our company self-performs over 2,000,000 work hours annually with a combined workforce of over 1,400 employees, which includes over 200 technicians dedicated to Building Services & Maintenance. We provide service, construction, and engineering services for clients across Wisconsin, Northern Illinois and the United States and have office locations in Muskego, WI; Freeport, IL; Rockford, IL; Aurora, IL; Westmont, IL; Peoria, IL; Champaign, IL; Lenexa, KS; Omaha, NE. In addition, we have piping fabrication shops in Rockford, IL, and Bridgeview IL, and a sheet metal fabrication shop in Rockford IL. With over 160,000 square-feet of floor space, we fabricate for both our own fieldwork and outside customers.

Helm Service offers 24/7/365 Emergency Services and our central dispatch for Illinois is located at our Corporate Headquarters in Freeport, IL. The dispatch centers are staffed Monday – Friday from 7 am – 3:30 pm and after hours, weekends, and holidays, the calls are routed to a call center with live representatives. Helms dispatch centers allow for 2-hour emergency response within the locations and regions we support. Our GPS offers our dispatchers the ability to send the closest available tech to the emergency.

Helm's corporate office is based out of Freeport, IL which is in the North Central part of the state of Illinois. We provide Mechanical, HVAC/R/Plumbing/Electrical Services, Construction, and Engineering services for clients across Northern Illinois and the United States and have office locations in Muskego, WI; Freeport, IL; Rockford, IL; Aurora, IL; Westmont, IL; Peoria, IL; Champaign, IL; Lenexa, KS; Omaha, NE. In addition, we have piping fabrication shops in Rockford, IL, and Bridgeview IL, and a sheet metal fabrication shop in Rockford IL. USPS Service-Related work will be dispatched and managed out of our Freeport, IL location. Repair and Replacement projects would be Run out of our Freeport, Aurora, or Peoria office depending on where the project is located. Construction projects would be run from either our Freeport office or our Westmont location depending on the location of the project.

 Phone
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815-238-1030

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aspray@helmgroupp.com

 Website
www.helmgroupp.com



Helm

September 6, 2024

Continuation Company Overview:

On an HVAC project, where Helm would be the Prime contractor, you can expect that Helm will self-perform 80-100% of the project. We typically subcontract concrete, crane services, insulation, fire protection, testing and balancing, painting, and general/carpentry trades, as needed. Helm has partnerships with multiple subcontractors that in some cases have lasted for decades. With the volume of work that Helm produces across Northern Illinois, there is always a sub that wants to work on our job. Helm is also invested heavily in technology and finding the most efficient ways to build jobs better and more efficiently. We mentor our subs and encourage them to adapt technologically along with us and since complacency is a word we don't take lightly; we are always on the lookout for subcontractors that differentiate themselves by bringing value to the team or project in some means or method. Should a subcontractor not be meeting its expectations on a project, Helm has a bench of preferred vendors to select from if need be.

Our Helm Service client base is comprised of primarily commercial, industrial, healthcare, and educational-based customers.


Over the past (3) years we have experienced double-digit growth in revenue in all factors of our business. This year our service group will eclipse \$80 million in revenue with the entire Helm group portfolio surpassing \$380 million.

We work in both the bid and spec customer environment, as well as the owner-direct negotiated arenas. We provide full-scale engineering, design, installation, and service capabilities at the above-mentioned facilities. We have seen steady increases in both our full and part-time employees over the past (3) years issuing over 1200 W-2s last year.

With over 7 service locations covering 4 states, we feel not only logistically our footprint is advantageous to this type of contract, but we also pride ourselves on being a "customer relationship" service company. We understand the importance of being able to provide quality service and craftsmanship in a timely manner 24 hours a day 7 days a week. Our people are what makes the difference in our company, our standards and mindset of total customer satisfaction is a well-developed culture within our company.

Helm Service would welcome the opportunity to continue to partner with the USPS and would appreciate your consideration.

Helm maintains a line of credit of \$40 Million and our Bonding capacity well exceeds the requirements of this solicitation. This year our service group will eclipse \$80 million in revenue with the entire Helm group portfolio surpassing \$380 million.

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aspray@helmgroupp.com

 Website
www.helmgroupp.com



Jeff McCoy
President Service Division

EDUCATION

U.S. Navy (Seabees) Utilitiesman "A" School

ADDITIONAL EDUCATION

Customer Service Developmental Training, Johnson Controls Institute
Leadership Development & Selling, Johnson Controls Institute
L.I.S.T. Customer Communications, Johnson Controls Institute
IAP Facility Audits, Chelsie Organization
L.I.S.T. Customer Communications, JCI Institute
OSHA 10 Hour
EPA Safety Regulations
Leadership Training, Helm Group
CPR/First Aid Certified

WORK EXPERIENCE

President Service Division Mechanical Inc. 2000-Present
Service Manager Siebe/Invensys 1997-2000
Service Manager Johnson Controls Inc. 1991-2000
Utilities man U.S. Navy (Seabees) 1986-1991

ASSOCIATIONS

ASHRAE Chapter President 2004
Association for Facilities Engineering
Mechanical Contractors Association of America (MCAA)
Mechanical Service Contractors of America (MSCA)—Education Committee
MSCA—National Board of Managers



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PATTIE KRIPPENDORF
Vice President Service Division
pkrippendorf@helmgroup.com

EDUCATION

OSHA 10 Hour Certification
CPR / 1st Aid Certified
Helm Group Leadership Training
Confined Space

EMPLOYMENT

2001-Present **Mechanical Inc. -Helm Group**
Service Division

- Responsible for coordination with owner, technical support, sales, customer satisfaction
- Provide assistance to accounts to provide preventative maintenance, installation, commissioning, and general communication. Knowledge of HVAC controls systems, facilities management systems, site preparation, peripheral equipment installation and servicing techniques.
- Prepare proposals for customers and complete the project within standard margins.
- Meet regularly with customers to become familiar with operating problems and offer solutions.

1987-2001 **Mechanical Inc. – Helm Group**
Construction Division

- Project Management – with a few of the diverse projects listed below.
 - Radial Light Tire Expansion – Kelly Springfield Tire Plant
 - Installation of hydraulic, steam, condensate, inert gas lines to new presses.
 - Dentyne Ice Facility – Cadbury Adams
 - Installation of site utilities (steam, condensate and compressed air)
 - Stockton WWTP
 - Installation of site utilities (effluent, influent and water)
 - Burlington School District
 - New addition at high school (hvac installation)

HONORS

Member of Association of Facilities Engineers
Member of American Society of Heating, Refrigeration & Air Conditioning
Member of Mechanical Service Contractors of America
20 Years of Service with Mechanical Incorporated



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Aaron C Spray
Project Sales Engineer



Education

Jefferson High School '87
BOUC Accredited -Associates Degree 2002-2004
EPA Certification for Contaminant & Lead Abatement .
SMACNA Project Management School
SECorp Service Sales Program
Numerous Manufacture Certifications

Work Experience 34 Years Experience in HVAC Industry

Helm Group – 2015-Current: Project Sales Engineer
DeKalb Mechanical: Sale Engineer –Service Manager
Norstar Mechanical: Division Manager-Project Manager
A.Spray Company : Indoor Air Quality Services -President CEO

Continuing Education

Illinois State Business Ethics Training
CE for Illinois State Life & Health Insurance
Mitsubishi Ductless Split and VRF System Design Training
Carrier Corp RTU selection & Application
Trane & American Standard B2B Sales and application
Geothermal Application & Design

Project Experience and Notable Contributions

System Design & Installation: NIU Locust Street Building
NIU Neptune Hall Main Cooler & Freezers
Blessed Sacrament Church –Aurora IL
Project Manager – LEED Gold Choices Mental Health Center –Ottawa, IL.



Andrea Fasciano
Account Manager
afasciano@helmgroup.com

INDUSTRY EXPERIENCE

Helm-Mechanical Inc Account Manager	Waukesha, WI 2011-Present
Zien Mechanical Service Manager	Milwaukee, WI 2008-2011
Furlong Industrial Systems, Inc. Service Manager	Germantown, WI 1989-2008

EDUCATION

Waukesha County Technical College, Pewaukee, WI
Associate Degree – Real Estate, Certificate in Property Management
Graduated in May 2007, GPA 4.0 on a 4.0 scale
Member of Phi Theta Kappa – International Honor Society
National Dean’s List
MRA - Leadership for Group Leaders Series
- Principles of management Series
- Effective Communication and Performance Management
SECorp - Operations and Client Care
- Service Agreements

ASSOCIATIONS

WHEA-Wisconsin Health Engineering Association
South Suburban Chamber of Commerce
MMAC Metropolitan Milwaukee Association of Commerce



PAST PERFORMANCE



We have included references from three relevant projects of comparable size, scope, and complexity. These references underscore our capability to deliver high-quality, cost-effective solutions while maintaining rigorous standards of safety and quality control.

Active relevant projects include:

- School District of Janesville- Facility Projects in total- \$7,400,000
- Sauk County Health Care-HVAC Replacements- \$1,188,340
- Jax-Facility Projects and Renovations in total- \$1,322,210
- Stoughton Trailers-Piping and Welding Projects- \$214,046
- City of Fitchburg-Public Library-Chiller Project- \$311,070
- Stoughton School District-Sand Hill Elementary-Chiller Project- \$607,960
- Stoughton School District-River Bluff Elementary-Chiller Project-\$593,423
- City of Sun Prairie- Facility Project- \$275,540
- USMS 24th Floor Renovation (GSA) - \$1,139,358 (Ken Jones)
- Argonne National Lab Building 369 Renovation - \$901,557 (Ken Jones)
- Lutheran General Hospital - Facility Projects in total - \$7,545,996
- Rosemont Ice Arena - Design Only - \$151,000 (Ron Kozanecki)
- Abbvie - Facility Projects in total - \$2,300,000
- General Mills - Facility renovations - \$22,000,000
- Waukegan School District Performance Contract - \$2,311,349
- Nestle Revitalized Phase 1 - \$5,450,557
- Proctor and Gamble Facility Projects in total - \$570,000
- Rockford Boys and Girls D/B ComEd Subsidized Project - \$1,337,712
- IDOT Pumping Station - \$2,299,105
- Northwestern University Boiler Decentralization Phase II - \$16,996,592
- Shedd Aquarium - Plumbing Renovation - \$2,897,059



SEE APPENDIX

See appendix for additional information including

- Project Profiles



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414.343.9222
815-238-1030



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afasciano@helmgroupp.com
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Website
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PAST PERFORMANCE




When Helm approaches projects of similar scope, it is lead through our Engineering Department, Managed by our Project Management team, and executed by our Union field staff. Our engineering team follows the construction process from infancy to completion to provide a cohesive solution and transparent results.

ENGINEERING TEAM LEAD



- Lead the design intent and process.
- Provide narratives, scheduling, and specifications.
- Provide Energy Design solutions and validations.
- Provide Value Engineering for transparent decision making.
- Provide practical design solutions.
- Sign and Seal Engineered Plans.
- Manage all engineering services (external & internal).
- Support VDC in design and CAD implementation.
- Provide details, schedules, equipment sourcing and sizing.
- Review project intent and Engineering issues.
- Support Project Managers and Field with engineering questions and concerns.
- Handle all delegated design scope.
- Support all active projects with post construction, QC and commissioning requirements.
- Implement Helm internal commissioning process.

 Phone
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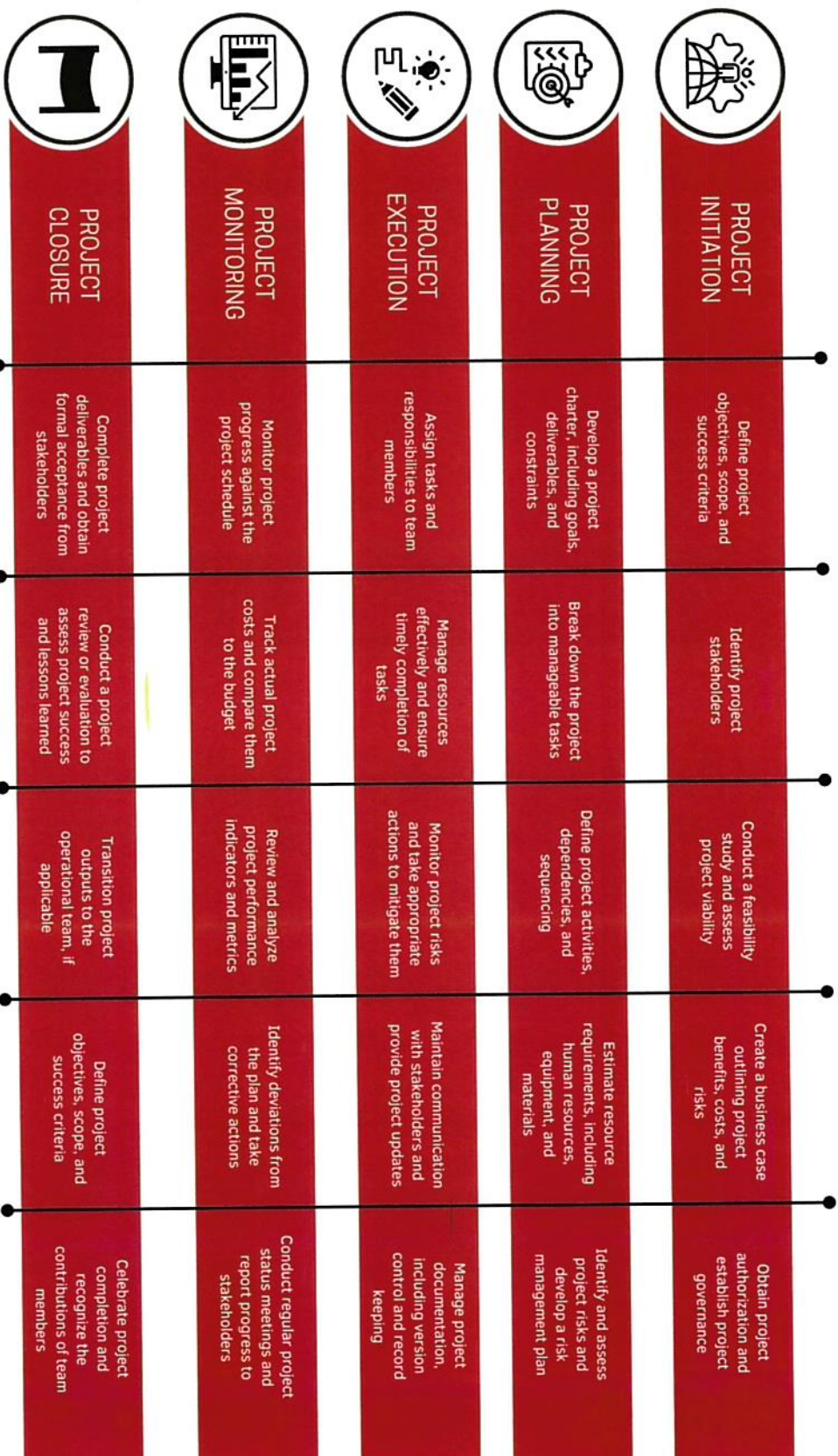
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afasciano@helmgroupp.com
aspray@helmgroupp.com

 Website
www.helmgroupp.com



Helm

PROJECT MANAGEMENT TEAM APPROACH METHODOLOGY AND PROJECT PHASES





Helm

September 6, 2024

References

-HVAC, Plumbing, Building Automation, Electrical, Sheetmetal Fabrication-

School District of Janesville

David Leeder-Facilities Manager-608-743-5083-dleeder@janesville.k12.wi.us
Project value \$4.6 million plus an additional \$2.8 million in boiler replacement projects.
Boilers, Air Handling Units, Unit Vents, Chillers, Water Heaters, VAV's- Energy savings
maintenance and upgrades on HVAC equipment at all schools.

Jax Incorporated

Scott Power-Facilities Manager-414-828-5480-spower@jax.com
Project value \$880,210.00 plus an additional \$442,000.00 for an expansion. MUA,
AHU's, Unit Heaters, Piping and Ductwork relocation project

City of Sun Prairie

New Lor – Facilities Supervisor- 608-825-0858
Boiler Replacements, Heat Pumps, Liebert and BAS project in progress

United States Gypsum Company


Jason Finney-Reliability Supervisor 262-725-3651
Maintenance contracts, HVAC Service, Plumbing, Equipment replacements, System
analysis. Project and contract \$500,000+.

Steele Solutions

Nick Buchmann-Plant Manager-414-491-9141-nick.buchmann@steelesolutions.com
We have built a trusted relationship over the last 10 years with Steele Solutions. We
self- perform all their maintenance, service and projects at their (3) locations. We are
involved in budget planning for HVAC equipment and Design Build projects that entail
installing new equipment, replacing existing with turnkey solutions.

MilliporeSigma

Reggie McLin -Maintenance Supervisor-920-234-3062
We perform steam boiler maintenance and service. Have the maintenance contracts for
over 12 years. High Pressure Steam Boilers, Rebuilt cooling towers and serviced their
chillers. Engineered systems for MilliporeSigma and in Design Build projects.

 Phone
414.343.9222
815-238-1030

 Email
afasciano@helmgroupp.com
aspray@helmgroupp.com

 Website
www.helmgroupp.com



Helm

September 6, 2024

Continuation References

Waukesha County Technical College

Jose Rodriguez -Facilities Services Manager-262-691-5186

Helm has a trusted partnership with WCTC and is their primary HVAC service provider for service, maintenance, and projects. RTU's Air Handler replacements, ductwork, unit heaters and piping.

Slumberland

Jay Shoppe - Property Manager- 651-787-7233-jay.schoppe@slumberland.com

Multiple locations-RTU's, Service, Maintenance

Hendricks Commercial Property

Justin Kuehne - Facilities Maintenance Manager Ph. 608-751-3178-

justin.kuehne@hendricksgroup.net

Ryan Kilingenmeyer - Facilities Manager

Ph. 608-295-3547- ryan.klingenmeyer@hendricksgroup.net

Adam Fisher - Facilities Maintenance Manager Ph. 608-730-5033

RTU's, Service. Maintenance

Stoughton School District

Mike Thomas - Building and Grounds Maintenance Foreman Ph. 608-877-5075-

mike.thomas@stoughton.k12.wi.us

Chiller replacement and service

Hilton Madison Monona Terrace

Timothy Stolowski- Maintenance Manager-608-260-2362-

timothystolowski@hiltonmadison.com

Performance Services Inc.

Matt Gilbert-414-367-5066 Operations Supervisor

Chiller replacement-AHU, MUA's and ductwork renovation project.

KinderCare


Anthony Gabow-Regional Facilities Manager- 248-835-5494

We are the preferred service provider for KinderCare. Performing maintenance, equipment replacements and all service.

Rockford Public School

Wilson Bailey / Mike Phillips-815-489-7224

Mechanical Incorporated's energy management team has supported the District for the last 12 years, and we would like to offer the past performance as a reference to the success of how we have served the District and continue to serve the District.

 Phone
414.343.9222
815-238-1030

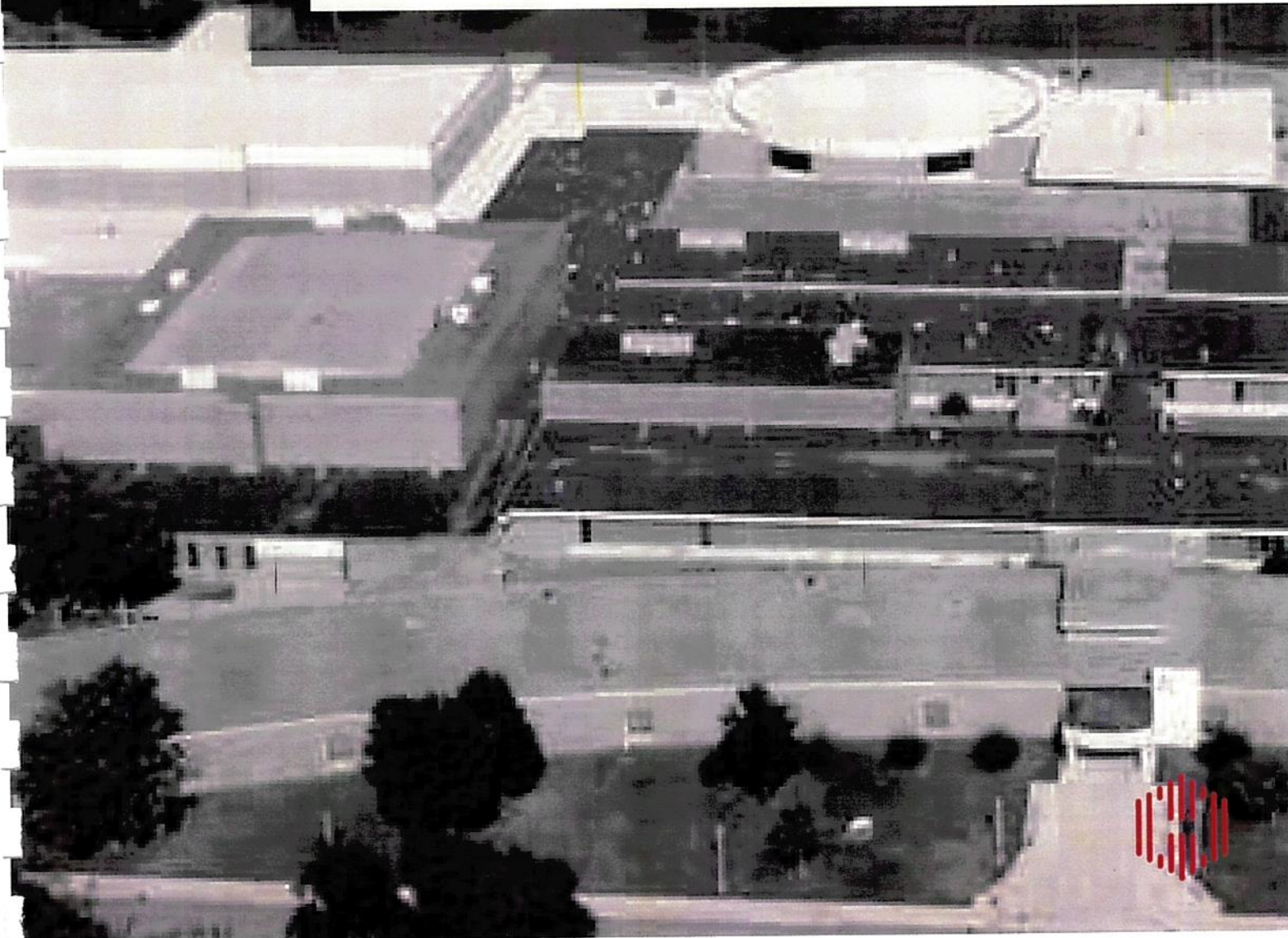
 Email
afasciano@helmgroupp.com
aspray@helmgroupp.com

 Website
www.helmgroupp.com

PROJECT PROFILE

School District of Janesville

Project value \$4.6 million plus an additional \$2.8 million in Boiler Replacement Projects. Boilers, Air Handling Units, Unit Vents, Chillers, Water Heaters, VAV's- Energy savings maintenance and upgrades on HVAC Equipment at all schools.



PROJECT PROFILE

Jax Incorporated

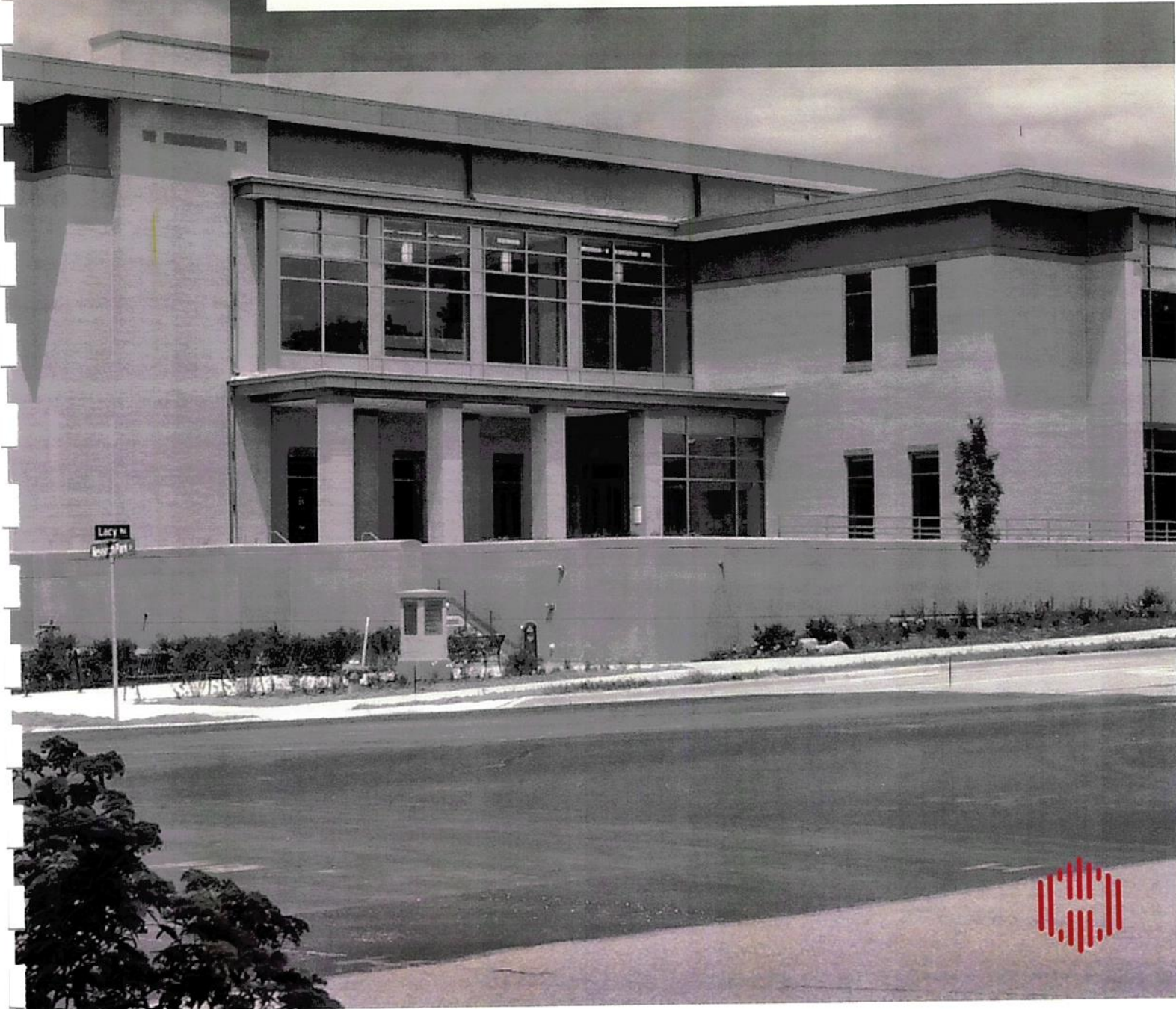
Project value \$880,210.00 plus an additional \$442,000.00 for an expansion. MUA, AHU's, Unit Heaters, Piping and Ductwork Relocation Project.



PROJECT PROFILE

City of Fitchburg

Project value \$311,070 for the Public Library Chiller Replacement, as well as an additional \$53,398 for the Community Center Boiler Replacements.



An aerial photograph of a school campus with several large, rectangular buildings with flat roofs. The buildings are arranged in a grid-like pattern. There are trees and grassy areas between the buildings. The sky is clear and blue.

PROJECT PROFILE

Stoughton School District

Chiller Project value \$607,670 for Sand Hill Elementary plus an additional \$593,453 for River Bluff Middle School. We also self-perform all the school's Preventative Maintenance and Service.





PROJECT PROFILE

Sauk County Health Care Center

Roof Top Ventilation Units Replacement Project
totaling \$1,188,340. This project included
replacing new 35, 45 and 75 ton RTU's.

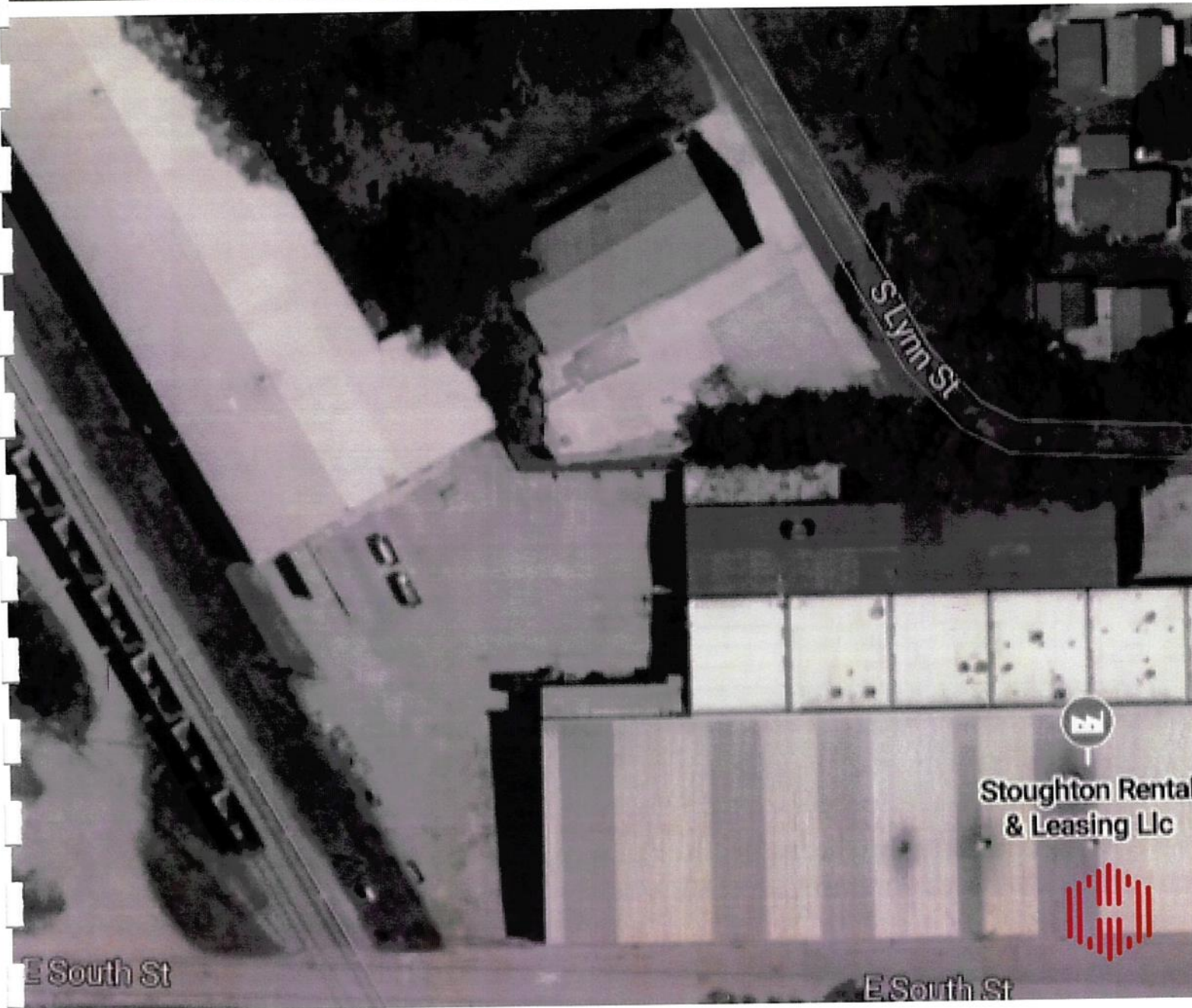
Sauk County Health
Care Center

Sauk County Health
Care Center

Sheelah
Fitzpatrick

Stoughton Trailers

Helm is actively servicing various Stoughton Trailer Plants. Helm has also performed Preventative Maintenance at the plants. Piping, Welding, Infared Heater and AC Replacements.



City of Sun Prairie

- Helm has a trusted partnership with the City of Sun Prairie. Helm has been their primary service provider for HVAC. Recent projects include Heat Pump, Libert Unit and Split System Replacements. We are actively working with them on upgrading HVAC Controls.





CLIENT PROFILE

Steele Solutions

We have a built a trusted relationship over the last 12 years with Steele Solutions. We self-perform all their maintenance, service and projects at their (3) locations. We are involved in budget planning for HVAC equipment and Design Build projects that entail installing new equipment, replacing existing with turnkey solutions.

CLIENT PROFILE

MilliporeSigma

We perform Steam Boiler Maintenance and Service. Helm has Maintenance Contracts with MilliporeSigma for over 14 years. High Pressure Steam Boilers, Rebuilt Cooling Towers and Serviced their Chillers. Engineered Systems for MilliporeSigma and in Design Build Projects.



CLIENT PROFILE

Waukesha County Technical College

Helm has a trusted partnership with WCTC and is their Primary HVAC Service Provider for Service, Maintenance, and Projects. RTU's Air Handler Replacements, Ductwork, Unit Heaters and Piping.





HENDRICKS
COMMERCIAL PROPERTIES

PROJECT PROFILE

Hendricks Commercial Property

We perform Service and Maintenance for Hendricks. Properties including Ironworks Hotel, Hotel Goodwin and Merrill & Houston's Steak Joint. Some projects including Controls, RTU and Boiler Replacements



Helm

PEOPLE BUILDING VALUE

ABOUT HELM SERVICE

Our Service Division provides a full line of HVAC/R Services including comprehensive & basic coverage maintenance agreements customized to meet your facilities' needs. Servicing state-wide in Illinois as well as southern Wisconsin, our entire service team is dedicated and committed to our number one goal of *Complete Customer Satisfaction*. Everything we do, and everything we are about revolves around this goal.

OUR SERVICES

- 24-hour 7 days a week emergency response and facility monitoring
- Preventative Maintenance Agreements
- HVAC
- Chillers (Process & Environmental)
- Cooling Towers
- Boilers (Steam & Hot Water) and Combustion Efficiency Analysis
- Process Burners
- Makeup Air Equipment
- Air Handling Units
- VAVs / Unit Ventilators / Unit Heaters
- Pumps & Compressors
- Computer Room Cooling Systems (Liebert Certified)
- Ventilation & Exhaust
- Humidifiers
- DDC Systems & Temperature Controls
- Pneumatics
- Process Piping/Plumbing
- Backflow Inspection/ Certification
- Smoke / Fire Damper Inspections
- IAQ Surveys / Inspections
- New Installations and Retrofits
- Engineering
- Eddy Current Test

HELM CAPABILITIES

HVAC | Plumbing | Sheet Metal
HVAC Piping | Industrial Process Piping
Wastewater Treatment | Pipe Fabrication
Commissioning | Aquatic Centers
Renewable Fuels | CAD/BIM | Medical Gas
Retro-Commissioning | Industrial Trades
Data Centers Special Projects Division

YOUR DEDICATED HELM TEAM

Andrea Fasciano
Account Manager
414-343-9222 | cell
afasciano@helmgroupp.com

Brett Mead
Operations Manager
815-990-1848 | cell
bmead@helmgroupp.com

Mike Unger
Service Manager
414-299-9026 | cell
munger@helmgroupp.com

Noel Weinzatl
Sales Associate
414-307-2511 | cell
nweinzatl@helmgroupp.com

Jeff McCoy
President
815-238-3960 | cell
jmccoy@helmgroupp.com

Pattie Krippendorf
Vice President
815-238-3954 | cell
pkrippendorf@helmgroupp.com

Holly Weinzatl
Dispatcher
262-798-1500 Ext. 4402
hweinzatl@helmgroupp.com

24/7 Dispatch
1-800-747-1955

SERVICE DIVISION

SERVICE DIVISION



Helm

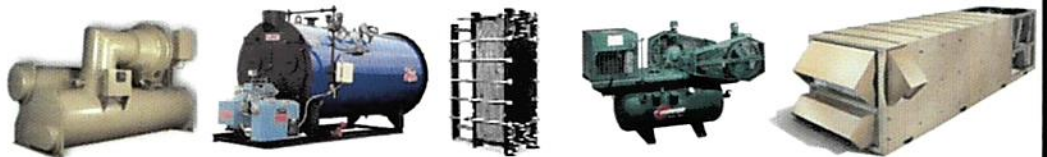
People Building Value

Our Service Division provides a full line of HVAC/R Services including comprehensive, & basic coverage maintenance agreements customized to meet your facilities needs.

Servicing Wisconsin, Illinois, Nebraska, and Kansas, our entire service team is dedicated and committed to our number one goal of "Complete Customer Satisfaction." Everything we do, and everything we are about revolves around this goal. Our Service offerings include the following:

- 24 hour 7 days a week emergency response and facility monitoring
- Preventative Maintenance Agreements
- HVAC
- Chillers (Process & Environmental)
- Cooling Towers
- Boilers (Steam & Hot Water)
- Boiler Combustion Efficiency Analysis
- Process Burners
- Makeup Air Equipment
- Pumps & Compressors
- Ventilation & Exhaust
- Computer Room Cooling Systems
- Humidifiers
- Temperature Controls
- DDC Systems
- Pneumatics
- Process Piping/Plumbing
- Backflow Inspection/ Certification
- NEW Installations/Retrofits
- Engineering
- Vibration Analysis
- Eddy Current Test
- Chemical Treatment
- Fire/Smoke Damper Inspections
- IAQ Surveys/ Inspections
- Aquatic Facility Startup/ Maintenance
- Dedicated Service Software

(262) 798-1500



SERVICE DIVISION



Helm

People Building Value

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