

Hernando County School District
Engineering Services

**HVAC Replacement
Powell Middle School**

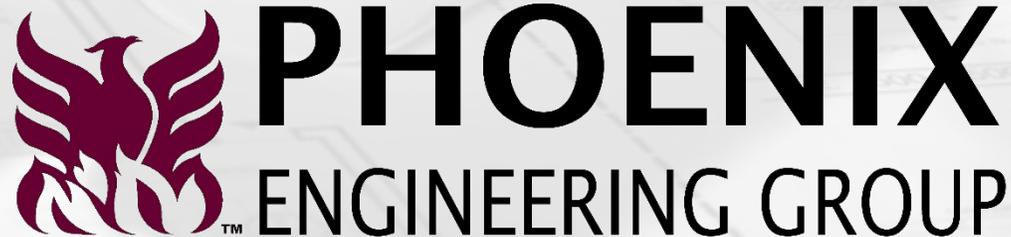
RFQ NO. 9009-2512-606



January 26, 2026



Presented by:





Introductions



**Chad West, P.E., Principal
CFO/Senior Mechanical
Engineer
Florida PE #81353**



**Rhett Jackson, P.E., Principal,
CEO/Senior Electrical
Engineer
Florida PE #53250**



Presentation Agenda



Part A – Why partner with Phoenix for the Hernando County School District

- Quick review of our qualifications

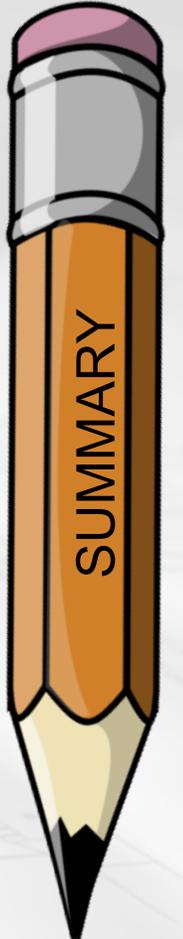
Part B – Why partner with Phoenix for the HVAC Replacement at Powell Middle School

- Proposed Solutions

Time for Questions



POWELL
MIDDLE SCHOOL





Part A – Phoenix Qualifications & Capabilities



About Phoenix Engineering

- Celebrating 20 Years in business, 9 employee SBE
- Principals are involved in the **entire process** from kick-off to completion
- K-12 Experience since inception
- Single Office location in Hillsborough County



“At Phoenix, we are big enough to serve you, but small enough to know you”



Phoenix Qualifications & Capabilities



Educational Qualifications Overview

- We have a long record of successful K-12 projects including HVAC dominant projects
- We have extensive experience with the challenges unique to educational facilities
- We regularly provide **pre-purchase** specifications for long-lead equipment
- We are accustomed to developing **phasing plans** to minimize construction impact





Phoenix Qualifications & Capabilities



Recent Educational HVAC and Similar Projects



HVAC Replacement at Springstead HS



Air Handlers at St. Petersburg HS



HVAC Replacement at Suncoast ES

- ★ **Suncoast Elementary School – HVAC** Replacement
- ★ **Fiber Install at Hernando High School**
- ★ **Central High School Fire Alarm Replacement**
- ★ **Springstead High School Fire Alarm Replacement**
- ★ Gibsonton Elementary School - **HVAC** Renovations
- ★ Sanders Elementary School - **Chiller** Replacement
- ★ Walden Lakes Elementary School - **HVAC** Renovations and Roof Replacement
- ★ Seminole Elementary School - **HVAC** Renovations to the Cafeteria
- Lealman Elementary School - Campus Wide Renovations
- St. Petersburg High School - Extensive Campus Renovations
- ★ Anona Elementary School - **HVAC** and Ceiling Lighting
- Clearwater Central Catholic High School - New Football Team Field House
- Clearwater Central Catholic High School - Renovation of the Field House and **HVAC**
- ★ Dunedin High School - **Chiller** Replacement
- ★ Maximo Elementary School - **HVAC** Building Management System Replacement

- ★ Bardmoor Elementary School - **Chiller** Replacement
- ★ Westshore Elementary School - **HVAC** Retrofit and Ceiling, Lighting Replacement
- ★ Morgan Fitzgerald Middle School - **AHU** Replacements
- ★ Hillsborough High School - Field House **HVAC**
- ★ Tarpon Springs Middle School - Extensive Mechanical, Electrical & Plumbing Renovations
- ★ Clearwater Fundamental Middle School - **HVAC** Renovations
- ★ Tarpon Springs Middle School - **Air Handler** Replacements
- ★ Palm Harbor Middle School - **HVAC** and Ceiling Lighting Replacement
- ★ Skyview Elementary School - **HVAC** Upgrades
- ★ Pinellas Park High School - **HVAC** and Ceiling Lighting Replacement
- ★ Walsingham Elementary School - Electric Gear Replacement
- ★ Oldsmar Elementary School - **Chiller** Replacement
- ★ Alexander Elementary School - **HVAC** Replacement
- IDEA Schools, Bassett (new school)
- IDEA Schools, University (new school)
- ★ Largo Middle School - **Chiller** Replacement
- ★ Carrollwood Elementary School – **HVAC** replacement

★ = PRIME



Phoenix Qualifications & Capabilities



Organizational Overview

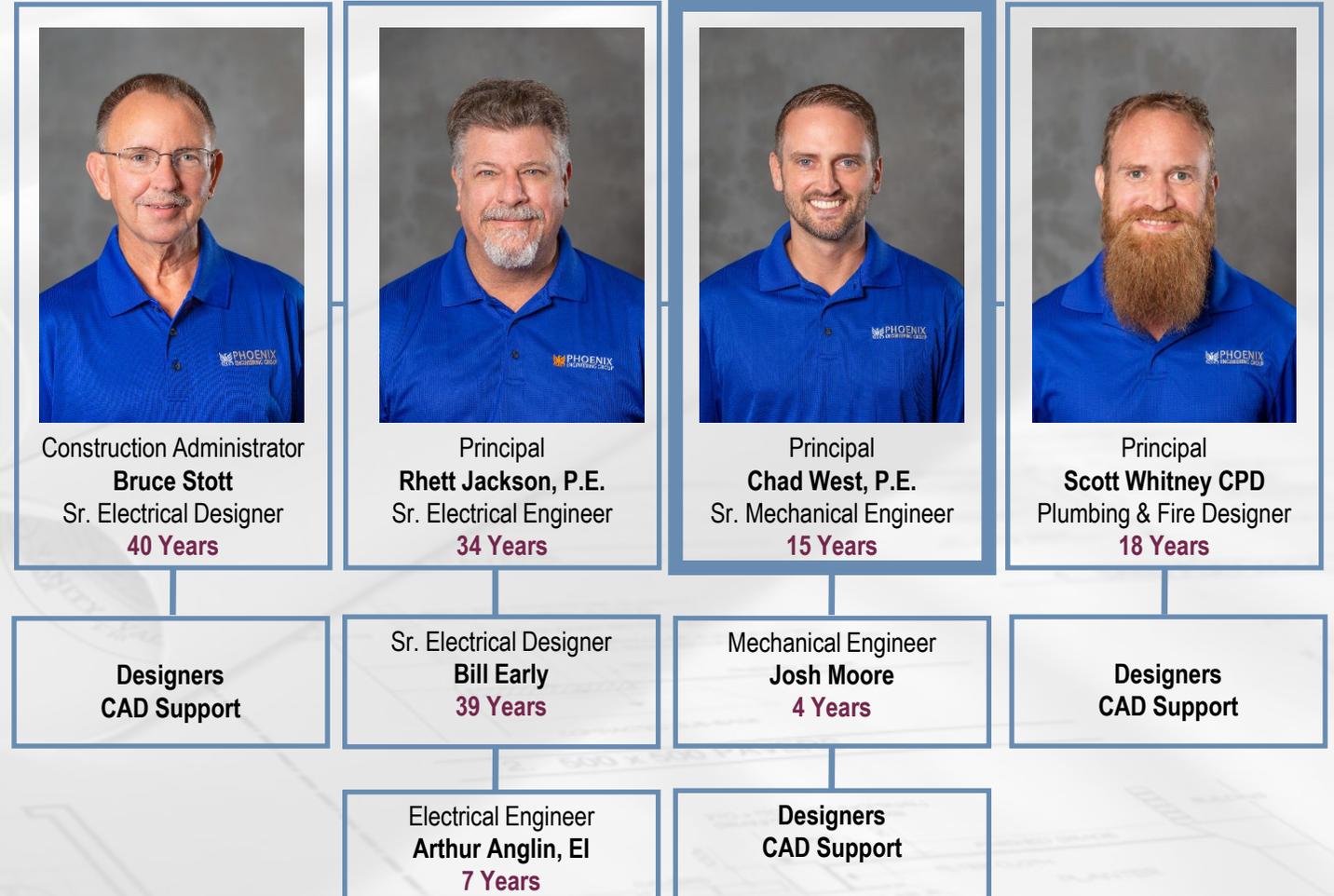
- Company founded in 2006
- Principals have worked together 15+ years
- Five full-time employees added since 2021

Principals and Officers

- Rhett R. Jackson, P.E., RCDD, LEEP AP, CEO
- Chad D. West, P.E., CFO
- Scott Whitney, CPD, EVP

Established line of communication

- Dedicated Project manager
- Single Point of Contact





Phoenix Qualifications & Capabilities



In-House Capabilities as Prime Consultant

Phoenix has acted as Prime Consultant on over **70% of our educational projects** in our history. While most have been primarily Mechanical or Electrical, our in-house capabilities include, but are not limited to:

- **Mechanical Engineering**
- **Electrical Engineering**
- **Plumbing Design**
- **Fire Protection**
- **Construction Administration**
- **Technology Design Service**





Phoenix Qualifications & Capabilities -Summary



Educational and Similar Project Experience

- Education experience since 2006
- Over 130 Education projects, 450 similar projects

Organizational Structure & Established Lines of Communication

- All work performed out of Tampa office
- Principals in charge lead each project
- Single Point of Contact-Dedicated Project Manager

Documented Experience acting as Prime Consultant

- MEP capabilities in-house
- Over 70% of Phoenix educational projects as Prime





Phoenix Staff Qualifications



Project Manager – Chad West, P.E.

Principal, CFO, Senior Mechanical Engineer



- **15 years** Mechanical Engineering experience
- Has worked with **7 local school districts**
- Experienced Project Manager
- Broad experience in educational building renovations in facilities that have **accelerated or phased schedules** and must remain open during the construction process.

Additional Mechanical Engineering Staff

Scott Whitney, CPD, Mechanical Designer

- 18 years of Mechanical Design experience
- AutoCAD
- REVIT and 3-D modeling

Josh Moore, Mechanical Engineer

- 4 years of Mechanical Design experience
- AutoCAD
- REVIT and 3-D modeling



Phoenix Staff Qualifications



Rhett Jackson, P.E.

Principal, CEO, Senior Electrical Engineer



- **34 years** Electrical Engineering experience
- Has worked with **7 local school districts**
- Experienced Project Manager
- Broad experience in building renovations in facilities that have **accelerated or phased schedules** and must remain open during the construction process.

Additional Electrical Engineering Staff

Bruce Stott, Construction Administrator

- 40 years of Construction Experience in K-12
- Limited Inspector and Plans Examiner Licenses
- Electrical Journeyman License

Bill Early, Sr. Electrical Designer

- 39 years of Electrical Design experience
- AutoCAD
- Fault Current Analysis

Arthur Anglin, Electrical Engineer

- 7 years of Electrical Design experience
- AutoCAD
- REVIT and 3-D modeling



Phoenix Staff Unique Qualifications



In-House Registered Communication Distribution Designer



- **360 degree camera** used to accurately and thoroughly capture all existing conditions
- **4K resolution drone** for aerial surveying and photography
- Latest AutoCAD software incorporated with **Autodesk Revit for BIM and 3D modeling**
- **Hourly Analysis Program** – Load calculations & energy simulations

In-House LEED AP Professional



- **EnergyGauge Summit** - Energy code compliance
- **Customized Spreadsheets** – HVAC Calculations, Panel Schedules & Power Calculations, Hydraulic Calculations
- Photometric models using **Lite Pro** and **Visual Lighting**
- **SKM Power Tools** for electrical systems analysis



Phoenix Staff Qualifications



Continuity from Design to Construction Administration

- Dedicated Project Manager
 - Sole responsibility is the success of the project
- Single Point of Contact
 - Responsible for all communication and coordination
- Dedicated Design Team
 - Same team from kick-off to punch out





Phoenix Staff Qualifications - Summary



Qualifications and relevant individual experience

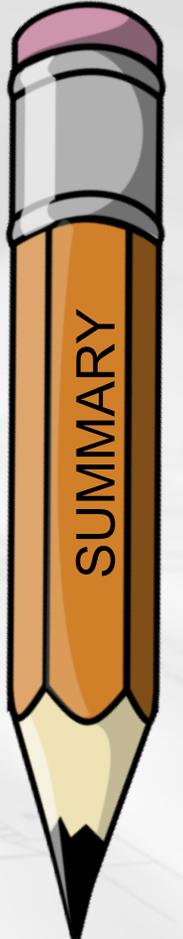
- Project manager with 15 years of Local K-12 experience
- All Phoenix staff has sufficient experience in K-12
- Principal engineers involved in every project start to finish
- All Phoenix engineering staff is JLA and Hernando badged

Unique Knowledge & Abilities of Staff

- Active subscriptions AutoCAD and Revit 3D modeling
- 360 camera for accurate field survey data
- Active MasterSpec subscription for project specific up to date specifications
- Pharmaceutical background gives us unique high purity air expertise

Continuity from design to construction administration

- Dedicated project manager from start to finish
- Design team responsible for construction administration





Example Project – Heritage Elementary School



Demonstrated Success as Prime:

- Multi-Phased
- Occupied Campus
- \$2.4M Budget
- \$281k Unused Contract Funds





Example Project – Suncoast Elementary School

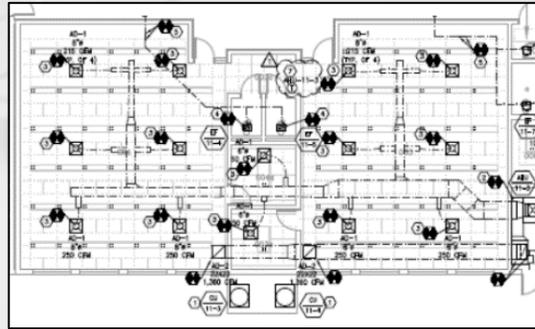
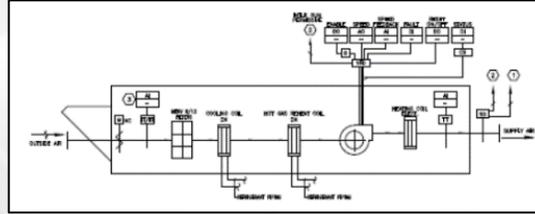


Demonstrated Success as Prime:

- Multi-Phased
- Occupied Campus
- No portables required with executed phasing strategy
- \$4.7M Budget
- \$4.5M Construction Cost



Example Projects – Alexander Elementary



Demonstrated Success as Prime:

- Condensed design schedule
- Condensed construction schedule
- On-time substantial completion
- \$3.4M Construction cost



Owner References



Design Professional: Final Completion Evaluation

MCPIS Evaluator: Chuck Plante

Date:

Project Name: Heritage Elementary Referendum (Year 6)

Project #: 100460

Design Professional Firm: Phoenix Engineering

DP Project Manager: Chad West

DP Project Manager Email: chadwest@phoenixeng.us

Evaluation at Final Completion	Not Applicable	Needs Improvement	Met Expectations	Exceeded Expectations
1. Received and updated CM's Punchlist in a timely manner including setting appropriate costs for each item	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2. Timely review & approval of all FINAL close out documents including As-built drawings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
3. Generated record documents in a timely manner	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
4. Submitted final Facility Space Chart with updated floor plans in a timely manner (for additions, renovations and all new facilities)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Complied with all deliverables per the Close Out Document Submittal Checklist including the Certificate of Final Completion	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
6. Timely/Accurately reviewed all Construction Database entries	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
7. Demonstrated a cooperative "can-do" attitude and routinely acted in the overall best interest of the Owner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>



August 27, 2025

To Whom It May Concern,

I am writing to you today to share my highest recommendation for Phoenix Engineering Group. Over the past few years, I have had the privilege of working closely with them on several construction management projects, and their exceptional skills and dedication have consistently positive.

This Phoenix Engineering Group stands out for their unwavering commitment to delivering high-quality results and innovative solutions. They have demonstrated remarkable expertise in project planning, design, and execution, always ensuring precision documents and professional construction administration. Their ability to handle complex challenges with ease is truly commendable.

One of the key strengths of Phoenix engineering Group is their exceptional team of engineers. Each member brings a wealth of knowledge and experience to the table, and their collaborative approach fosters a positive and productive working environment. They are highly skilled in their respective fields and possess a deep understanding of the latest industry trends and technologies.

Furthermore, their dedication to Saint Petersburg College's satisfaction is unparalleled. They consistently go above and beyond to ensure that all project requirements are met and end result exceeds expectations. Their attention to detail, clear communication, and proactive problem-solving approach have made them a trusted partner in every project we have undertaken together.

In conclusion, I wholeheartedly recommend Phoenix Engineering Group for any project requiring expertise, professionalism, and a commitment to excellence. I am confident that they will continue to provide the College outstanding service and deliver exceptional results for any future endeavors.

Sincerely,

David Cutler

David Cutler



Mailing Address: Post Office Box 13488, St. Petersburg, FL 33733-3489

St. Petersburg College is committed to equal access/legal opportunity in its programs, activities, and employment. For additional information visit www.spc.edu/aeoc/



April 17, 2025

To whom it may Concern,

I have known the principals of Phoenix Engineering Group for over twenty years and have been working with them for over twelve years in my current position as Facilities Manager for the City of Sarasota. I have found them to be extremely professional and easy to work with. They have provided MEP engineering for a variety of projects ranging from facility evaluations, Chiller replacements, Air Handling replacements, Police Headquarters Critical Exhaust System redesign, and the most recent complete was our Federal Building's VAV Box replacements with a new HVAC Controls System. Their expertise and responsiveness at Phoenix Engineering has made them a real asset to the City of Sarasota. They fully understand the project goals, provide innovative solutions, and eliminate pit falls that could result in additional down time and costs. Communication with the Phoenix team is straightforward and efficient. In addition, the Phoenix team provides exceptional service while maintaining attention to detail and true professionalism.

For the reasons stated above, I can highly recommend Phoenix Engineering Group.

Respectfully,

Eric Patro

Facilities Manager
941-720-0047 mobile
941-263-6274 ext. 36274
eric.patro@sarasotafl.gov

FACILITIES DEPARTMENT 1560 FIRST STREET SARASOTA, FLORIDA 34234
PHONE: 941-951-2125 FAX: 941-951-4211



October 13, 2021

To whom it may concern,

I am a project coordinator for Pinellas County Schools Facility, Design and Construction department, charged with oversight and management of construction projects in the seventh largest school district in the State of Florida.

I have worked with Phoenix Engineering Group for the past fifteen years and I have personally known and worked with Mr. Jackson for over twenty-four years. During which he has earned my complete trust. He has always been honest and straight forward, looking out for the District's best interest. He has consistently over delivered on his commitments, as well as my expectations.

Mr. Jackson and his team have provided MEP engineering for numerous projects ranging from over \$40M to under \$100K in construction. Mr. Jackson has acted in the capacity of the Project Architect/Engineer who is responsible for and in charge of the entire design team for many of the District's projects. He manages his team efficiently and effectively; constantly keeping me apprised of project status, timelines and budget issues. He anticipates design and construction challenges offering innovative insight and solutions to problems encountered.

Mr. Jackson approaches each project, no matter the size, with the same level of professionalism and vigor. His designs and engineering solutions are accurate, detailed, cost effective and practical which reduces management headaches during construction. For renovations, Mr. Jackson personally takes the time to conduct detailed site surveys, so he completely understands the built conditions of a project. During construction he stays intricately involved until completion.

I whole heartily endorse Mr. Jackson along with the staff at Phoenix Engineering Group and give them my highest recommendation.

Sincerely,
Erica Slatt
Erica Slatt
727-838-1116

10/22/21

1



Prior Experience & Performance - Summary



Three Examples of successful projects

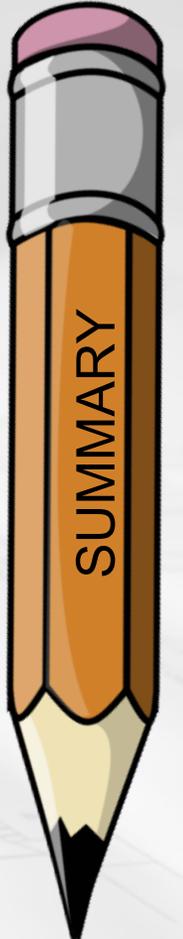
- Three of many successful similar projects as prime provided

Demonstrated success on each of the projects

- Multi-phased
- Occupied campuses
- Under budget
- Compressed schedules

Owner references for each of the projects

- Provided as example
- Full copies in Step 1 Package





Project Approach



Budget Evaluation and Cost Control

➤ Cost Estimating

- Adept at using accurate methodology
- We can provide third-party cost estimating

➤ Value Engineering

- Identification of potential VE
- Early overage identification and mitigation

Project Number: 20-023		
Date: October 15, 2020		
ITEM	DESCRIPTION -PHASE 1	Total
1	GENERAL CONDITIONS	\$714,441
2	SITE, CIVIL, EXISTING TOTAL	\$688,900
3	ARCHITECTURAL AND STRUCTURAL TOTAL	\$1,227,775
4	OPENINGS (DOORS & WINDOWS) TOTAL	\$120,000
5	SPECIALTIES & EQUIPMENT TOTAL	\$72,000
6	SPECIAL CONSTRUCTION TOTAL	\$75,000
7	FURNITURE (EXCLUDED)	\$0
8	FIRE SUPPRESSION TOTAL	\$44,240
9	PLUMBING TOTAL	\$165,500
10	HVAC AND AUTOMATION TOTAL	\$855,750
11	ELECTRICAL TOTAL	\$494,175
12	PROCESS UTILITIES TOTAL	\$419,600
	CONSTRUCTION SUB-TOTAL:	\$4,877,381
13	PROFESSIONAL A/E FEES (9%)	\$438,964
14	FACILITY VALIDATION AND COMMISSIONING (3.9%)	\$190,218
15	PERMITTING AND SOFT COSTS (5%)	\$243,869
16	MARKET ADJUSTMENT (2%)	\$97,548
17	CONTINGENCY (10%)	\$487,738
	CONSTRUCTION BUDGET TOTAL FOR PHASE 1:	\$6,335,718
18	SUPPORT FUNCTION (1.5%)	\$95,036
19	PM (75% COMP SALARY)	\$150,000
20	SGIE (1.25%)	\$79,196
	LONZA SUPPORT COSTS TOTAL:	\$324,232
21	PROCESS EQUIPMENT DPO TOTAL	\$3,954,456
22	PROCESS EQUIPMENT INSTALL TOTAL	\$600,000
23	EQ. VALIDATION AND COMMISSIONING	\$120,000
	PROCESS EQ. TOTAL:	\$4,674,456
	PROJECT BUDGET TOTAL FOR PHASE 1:	\$11,334,406

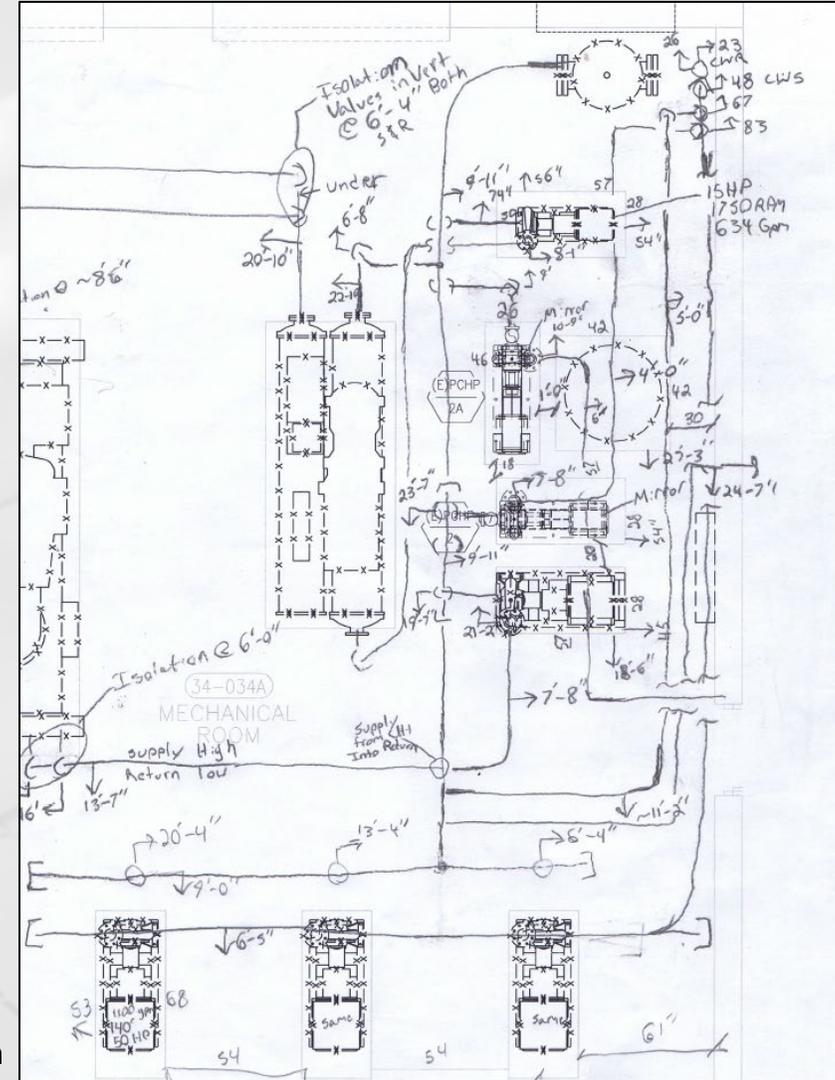


Project Approach



Quality Control

- **Existing Conditions**
 - Thorough site verification = Limited construction conflicts
- **Custom Specifications**
 - Can build custom specification, always project specific
 - Non-engineering specifications
- **Final Drawing review and coordination by Principal in Charge**



Example: detailed field notes/sketch



Project Approach



Quality Control

- **Robust, maintenance-friendly design**
 - Easily accessed equipment
 - Materials suitable for Florida
- **Communication and Reporting**
 - Detailed meeting agendas, minutes and field reports
- **Scheduling**
 - Phasing and school schedule important
 - Pre-purchase specifications
- **Project Punch Out**
 - Same dedicated team
 - On-time close out
 - Quality record documents


PHOENIX ENGINEERING GROUP, Inc.

Field Observation Report

10012 N. Dale Mabry, Suite 102 • Tampa • FL • 33618 • Tel. 813.963.0888 • Fax. 866.335.0109

Project Name: Suncoast Elementary School HVAC Replacement Phase II Date: 03/10/2023
 Project Number: 20-049 Discipline: Mechanical Time: 9:00 AM
 Work in Progress: Generator, Final Mech & Elect Weather: Sunny, 80°F
 Report By: C. West % Complete 90%

Attendees: B. Stott, C. West, R. Oakley, G. Garza, T. Courchene, S. Stremplewski
 Distribution: File, R. Oakley, G. Garza, R. Jackson

The following list represents issues discussed in the field or items observed that require attention, repair, and replacement or are non-compliant with the contract documents.

Item	Description
01	Rm. 01-025 Ductless Split thermostat need to be mounted on wall. Hanging freely
02	Rm. 4-11 Remove Blocker cart from classroom
03	Bldg. 3 Clean exhaust air devices in restrooms. Excessive dust compared to other buildings
04	Rm. 3-003,3-005, 3-006, 3-007 have temporary thermostats, not flat plate sensor. Replace with flat plate sensor.
05	Bldg. 5 cafeteria – Replace water damaged ceiling tiles around air devices.
06	Bldg. 5 cafeteria – Replace water damaged ceiling tiles near stage (SW corner) and under new EHPA exhaust fan.




END OF REPORT

20-049_FOR_2023-03-10adv.doc

Page 1 of 1



Project Approach - Summary



Budget Evaluation & Cost Control Methodology

- Experienced project estimators
- Early identification of overages and potential VE

Quality Control methodology

- Accurate field survey work
- Not relying on as-built drawings
- 360 Camera of every room

Documented Communication and Reporting proficiency

- Well established standard field reporting and minutes
- Same dedicated design team – they know the design intent

Proficiency and Understanding of project scheduling

- Demonstrated success in multi-phase and occupied campuses
- Summer project schedule
- Proficient in the pre-purchase of major equipment

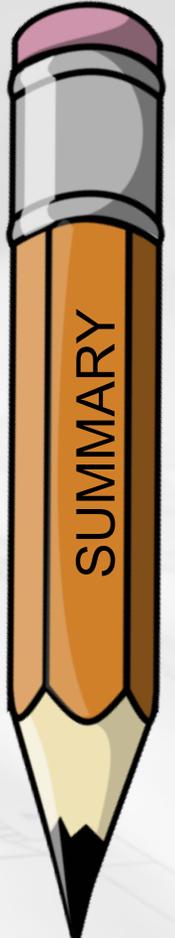
Approach to Project Close-Out

- Punch list generated with location and pictures
- In-person verification of punch list
- Controls graphics and demonstration prior to SC

SUBSTANTIAL COMPLETION PUNCH LIST

DATE: 10/13/23 and 10/18/23
 NAME OF SCHOOL FACILITY: Suncoast Elementary Phase II Substantial Completion
 PROJECT NUMBER: 20-049
 INSPECTOR: Chad West / Bruce Stott/Thomas Giorlando

First Inspection				Second Inspection	12/21/2023	Third Inspection	
#	Location	Discipline	Item / Description	Request Date	Completion Date	Request Date	Completion Date
9.	Varies	Electrical	Emergency lighting relays are bad in B-2/R-204, 205, 206, 207, 209 and B-4/R-4.		12/21/2023		
10.	B-1/R-15A	Electrical	B-1/R-15A – Occupancy switch is defective.		12/21/2023		
11.	B-1/R-13	Electrical	B-1/R-13 – Occupancy sensor is not programmed correctly.		12/21/2023		
12.	B-1/General	Electrical	Clerical staff stated that multiple rooms in the office building will be on when workers arrive on a weekend. Provide verification in the lighting commissioning report that all sensors are working per the design intent.				
13.	B-1/R-22	Electrical	B-1/R-22 – One 2' x 4' luminaire is not working.		12/21/2023		
14.	B-2/R-24	Electrical	B-2/R-24 – Two bad LED drivers.		12/21/2023		
15.	B-4/R-14	Electrical	B-4/R-14 – Emergency relay is not working. One luminaire stays on when the switch is turned off.		12/21/2023		
16.	General	Electrical	Field adjust all circuit breakers in distribution panelboards.				
17.	B-5	Mechanical	Label locations of above ceiling mechanical equipment in cafeteria and kitchen (Exhaust fans and Electric duct heaters)				

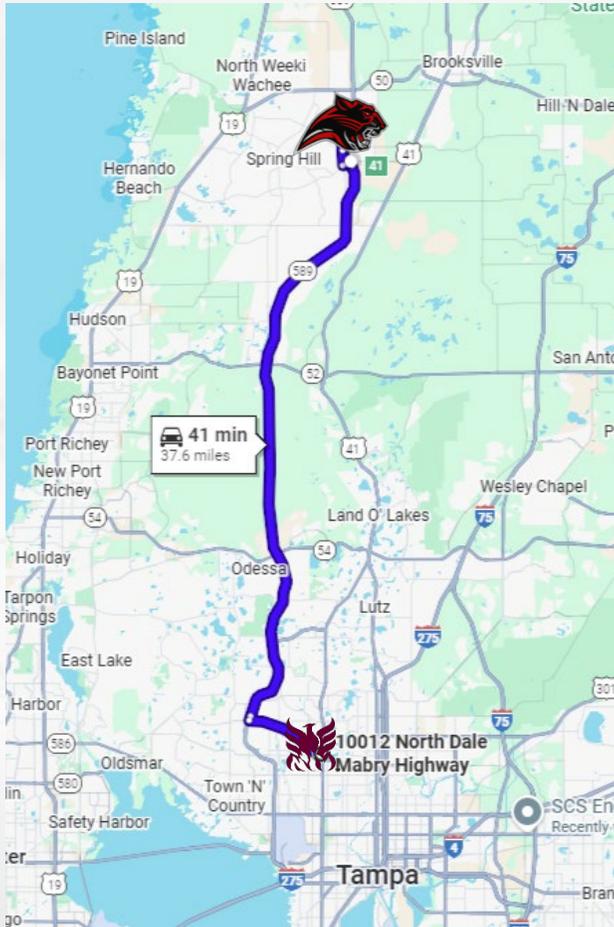




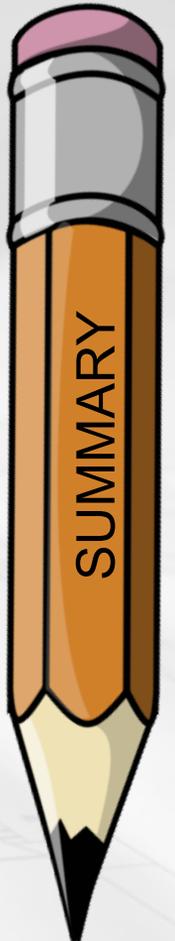
Work Location



Office in Tampa



- A 41 minute trip to Powell MS means we can be on-site within an hour as needed
- Your Project Manager is always available by cell
- All design and construction documents will be produced at our Tampa office



Part B – Powell Middle HVAC Replacement

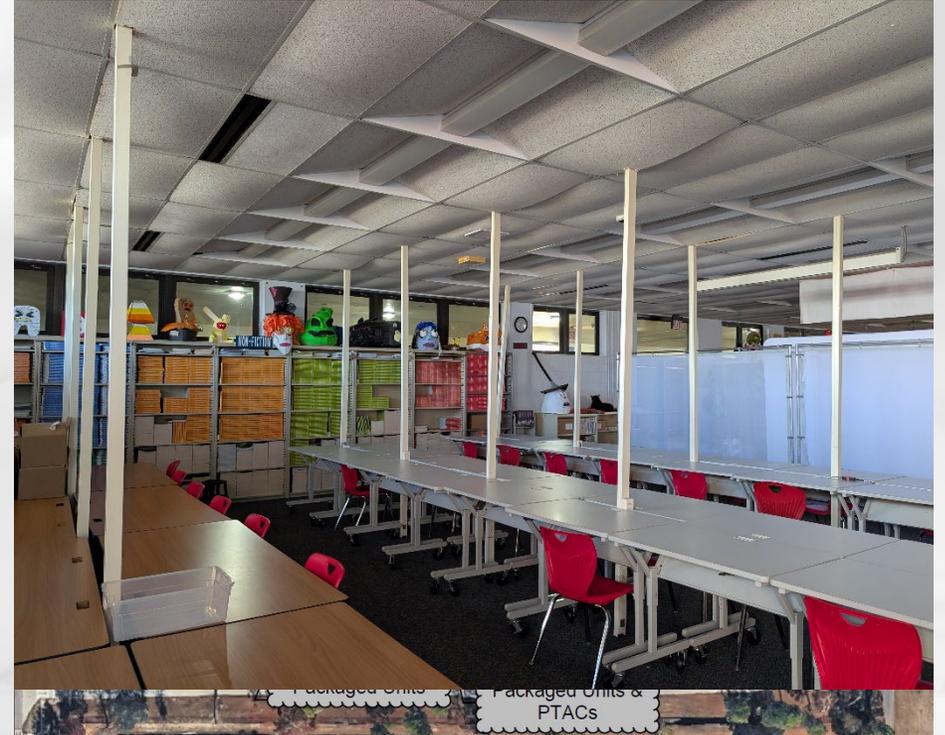


Existing Conditions

- Mixture of aged DX units, lack of consistency
- Expansive maintenance needs
- Aged ceiling grid, tiles, light fixtures and egress lighting

Project goals for success

- Early release package
- At or Under Budget GMP
- On-time substantial completion
- Replace HVAC systems while minimizing class relocations
- Minimize student/staff impact
- Robust, efficient and maintenance-friendly future





Powell Middle School - HVAC Replacement



Site-Specific Proposed Design: Mechanical

- New High Efficiency Air Cooled Chiller Plant
- Underground HDPE Piping
- Chilled water classroom units (No new mechanical rooms)
- DX Packaged for Gym and Media with Hot Gas reheat for humidity control
- New DDC Controls with Trane Ensemble integration



Site Specific Proposed Design – Electrical

- New energy efficient LED lighting
- Enhanced lighting controls
- Consistent egress lighting

Powell Middle School - HVAC Replacement



Site-Specific Proposed Design: Architectural

- New ceiling grid at existing height
- 2x2 grid and light fixtures
- Alternate for Reading Room refresh
- NO NEW MECHANICAL ROOMS!



Powell Middle School HVAC Replacement



Preliminary Phasing Strategy

Fall Semester 2026-Spring 2027

- Start Chiller Plant Construction
- RTU Replacements (Gym and Media)

Summer 2027

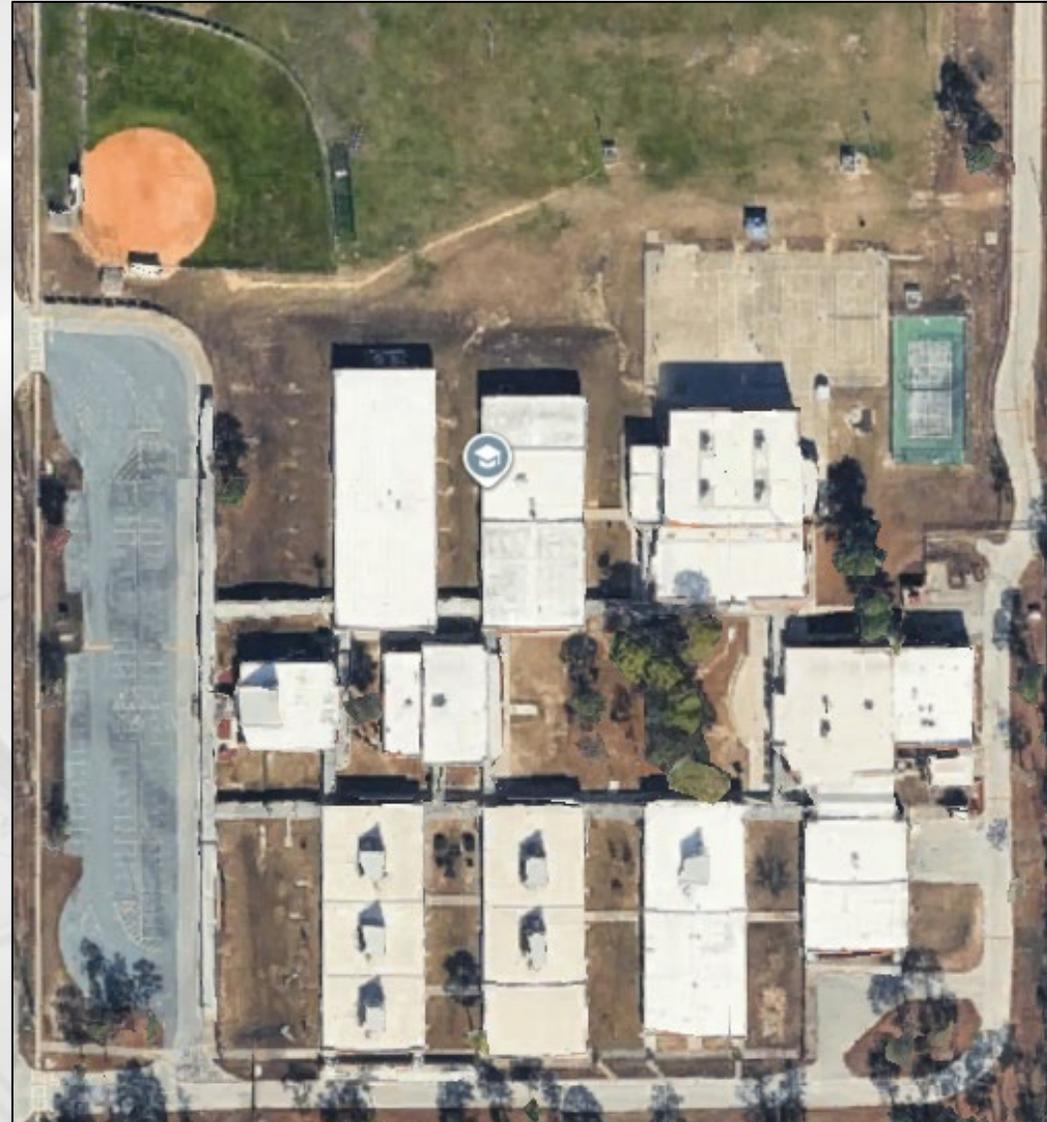
- Underground chilled water
- Admin. Cafeteria, and building 800
- Portable installation (if necessary)

Fall 2027 to Spring 2028

- Phased Replacement of classrooms

Spring 2028

- Complete phased replacements
- Project Close-out



Powell Middle School HVAC Replacement



Classroom Building Phasing Strategy

- Demolish 4 classrooms nearest new chilled water
- Install new classroom units, ceilings, and lights
- Partial Substantial completion and move in
- Repeat across building





Questions?



Thank You!



PHOENIX
ENGINEERING GROUP