



# ADMINISTRATION COMMITTEE

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## Agenda Report

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**File #:** 2025-4473

**Agenda Date:** 9/10/2025

**Agenda Item No:** 5.

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**FROM:** Robert Thompson, General Manager  
Originator: Lorenzo Tyner, Assistant General Manager

**SUBJECT:**

**COOPERATIVE PROCUREMENT WITH CARRIER GLOBAL CORPORATION FOR HVAC MAINTENANCE SERVICES**

**GENERAL MANAGER'S RECOMMENDATION**

RECOMMENDATION: Recommend to the Board of Directors to:

- A. Approve a Blanket Purchase Order with Carrier Global Corporation for HVAC Maintenance and Repair services at Orange County Sanitation District facilities in an amount not to exceed \$1,400,000, utilizing the Sourcewell Cooperative Master Agreement No. 080824-CAR for the period October 1, 2025, through September 30, 2026, with three (3) one-year renewal options; and
- B. Approve a contingency in the amount of \$140,000 (10%).

**BACKGROUND**

Orange County Sanitation District (OC San) has a recurring need for preventive and corrective maintenance on HVAC systems at its facilities. These systems are critical for cooling electrical, lab, and IT equipment, as well as maintaining a comfortable environment in occupied areas.

**RELEVANT STANDARDS**

- Participate in local, state, and national cooperative service and purchasing programs
- Maintain a proactive asset management program
- Provide a safe and collegial workplace

**PROBLEM**

Extended material lead times, high volume of work, and aging equipment are causing HVAC maintenance delays and failures.

## **PROPOSED SOLUTION**

Approve a BPO with Carrier Global Corporation for HVAC maintenance and repair services.

## **TIMING CONCERNS**

HVAC equipment failures are occurring due to resource constraints and delays in performing preventive maintenance and repairs. This could lead to more costly total equipment replacements.

## **RAMIFICATIONS OF NOT TAKING ACTION**

Failure to act could lead to critical HVAC equipment failure, potentially damaging systems that require a controlled environment and disrupting overall plant processes.

## **PRIOR COMMITTEE/BOARD ACTIONS**

September 2023 - Approved a Blanket Purchase Order with Carrier Commercial Services for maintenance services of heating, air conditioning, and ventilation systems for Plant No. 1, Plant No. 2, and pump stations, utilizing the Sourcewell Cooperative Agreement No. 070121-CAR in accordance with Ordinance No. OC SAN-61, Section 2.03(B), for the period beginning October 1, 2023 through September 30, 2024, for a total amount not to exceed \$1,200,000 with two (2) one-year renewal options; and approved a contingency of \$120,000 (10%).

## **ADDITIONAL INFORMATION**

Sourcewell is a government unit that establishes competitively awarded cooperative contracts on behalf of itself and other participating agencies such as OC San. Utilizing this contract allows OC San to benefit from the significant discounts available on this contract which range from 35-71.5% off MSRP.

## **CEQA**

N/A

## **FINANCIAL CONSIDERATIONS**

This request complies with the authority levels of OC San's Purchasing Ordinance. The recommendation will be funded under the Repairs and Maintenance line item for Administrative Services (Budget Update FY 2025-26, Page 23). The available funding is sufficient for this action.

## **ATTACHMENT**

*The following attachment(s) may be viewed on-line at the OC San website ([www.ocsan.gov](http://www.ocsan.gov)) with the complete agenda package:*

N/A