

THE CITY OF OKLAHOMA CITY
A Municipal Corporation

PRICING AGREEMENT

APPROVED by the Council and SIGNED by the Mayor of The City of Oklahoma City this

20TH day of JUNE, 2023.

ATTEST:

Amy K. Simpson

CITY CLERK



David Holt

MAYOR

Reviewed for form and legality.

Cawl Annett

ASSISTANT MUNICIPAL COUNSELOR

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Supplier: Jackson Mechanical Service Inc.

**BID/PRICING AGREEMENT/CONTRACT FORM & NON-DISCRIMINATION
STATEMENT**
**BIDDER MUST ELECTRONICALLY COMPLETE, SIGN AND NOTARIZE THIS
DOCUMENT PRIOR TO SUBMITTING IN THE ELECTRONIC BID SYSTEM**

**Please be aware that typing in your password acts as your electronic signature, which is
just as legal and binding as an original signature.**

(See Electronic Signatures in Global and National Commerce Act for more information.)

**THIS DOCUMENT MUST BE ELECTRONICALLY SIGNED AND SUBMITTED WITH THE BID
OR THE BID WILL BE REJECTED**

INSTRUCTIONS: This document MUST be electronically signed and submitted with the bid for the bid to be valid. Failure to electronically sign the this document prior to submitting the electronic bid will result in rejection of your bid. This document constitutes your bid and will be the Pricing Agreement/Contract document under which you are to perform, should your bid be accepted, so it must be properly and completely executed. It is, therefore, essential that you are aware of its terms, as well as those contained in the specifications.

Submit this electronically signed document, along with all accompanying documents:

THIS PRICING AGREEMENT/CONTRACT is made and entered into, by and between **Jackson Mechanical Service Inc.** hereinafter referred to as "Bidder" and The City of Oklahoma City, a municipal corporation, or a participating Public Trust of which The City of Oklahoma City is Beneficiary hereinafter referred to as the "Contracting Entity."

WITNESSETH:

WHEREAS, the governing body of the Contracting Entity has approved certain specifications and requested by notice that bids be submitted thereon; and

WHEREAS, this document until executed by the Mayor/Chairman of the Contracting Entity constitutes the Bidder's proposal; and

NOW, THEREFORE, that in consideration of the covenants, agreements and representations as hereinafter set forth, it is mutually agreed by the parties that:

1. The Bidder agrees to sell and deliver to the Contracting Entity, the items of material and/or services, specified in the pricing section of the electronic bid submittal, which is attached hereto and made a part of this Pricing Agreement/Contract. List the prompt payment discount, if any, for this agreement in the space provided below:

Discount for Prompt Payment **0% 0 Days**

2. The Bidder expressly warrants that all articles, material, and/or work covered in this Pricing Agreement/Contract will conform to the specifications and electronic bid documents attached to this bid and are hereby incorporated, as if set forth in full herein; and further warrants that the same shall be of good material and workmanship, and free from defects.

3. The Bidder understands that all bids are to be submitted in U.S. dollars at a firm price. Bids submitted in any currency other than U.S. dollars will be rejected.

4. The Bidder also understands that all invoices shall be submitted in U.S. dollars and agrees to accept payment in U.S. dollars as full satisfaction of the invoiced amount.

5. If any of the goods fail to meet the warranties contained in Paragraph 2, above, the Bidder, upon notice from the Contracting Entity, shall promptly correct or replace the same at the Bidder's expense. If the Bidder shall fail to so do, the Contracting Entity may cancel this order as to all such goods, and in addition, may cancel the then remaining balance of this order. After notice to the Bidder, all such goods will be held

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at the Bidder's risk. The Contracting Entity may, at the Bidder's direction, make available such goods to be returned to the Bidder at the Bidder's risk, and all transportation charges, both to and from the original destination, shall be paid by the Bidder. Any payment for such goods shall be refunded by the Bidder unless the Bidder promptly corrects or replaces the same at the Bidder's expense.

6. The Contracting Entity agrees to pay to the Bidder the price and amount in accordance with Paragraph 1 above, based on the quantity actually purchased, upon delivery to and acceptance by the Contracting Entity, of the material and/or service[s] above described and upon the filing by the Bidder, and approval by the Contracting Entity, of a verified claim for the amount due.

7. The Bidder agrees, in connection with the performance of work under this Pricing Agreement/Contract:

a. That the Bidder will not discriminate against any employee or applicant for employment, because of race, creed, color, sex, age, national origin, ancestry or disability. The Bidder shall take affirmative action to ensure that employees are treated without regard to their race, creed, color, age, national origin, sex, ancestry or disability. Such actions shall include, but not be limited to, the following: employment, promotion, demotion or transfer, recruitment, advertising, lay-off, termination, rates of pay or other forms of compensation and selection for training, including apprenticeship. The Bidder agrees to post, in a conspicuous place available to employees and applicants for employment, notices to be provided by the City Clerk/Secretary of the Contracting Entity setting forth the provisions of this section, and;

b. That the Bidder agrees to include this non-discrimination clause in any subcontracts connected with the performance of this Pricing Agreement/Contract.

8. In the event of the Bidder's non-compliance with the above non-discrimination clause, this Pricing Agreement/Contract may be canceled or terminated by the Contracting Entity. The Bidder may be declared by the Contracting Entity ineligible for further Pricing Agreement[s]/Contract[s] with the Contracting Entity until satisfactory proof of intent to comply is made by the Bidder.

9. The risk of loss or damage shall be borne by the Bidder at all times until the acceptance of goods, properly packed, by the Contracting Entity.

10. This Pricing Agreement/Contract, specifications, electronic bid submittal documents and any attachments constitutes the entire understanding and agreement of the parties upon the subject matter hereof. There is no agreement, oral or otherwise, which is not contained in or attached to this Pricing Agreement/Contract. This Pricing Agreement/Contract may not be modified or assigned unless approved in writing and signed by both parties.

11. The parties assume and understand that the variables in the Bidder's cost of performance may fluctuate; consequently, the parties agree that any fluctuations in the Bidder's costs will not alter the Bidder's obligations under this Pricing Agreement/Contract nor excuse performance or delay on the Bidder's part.

12. This Pricing Agreement/Contract shall be inoperative during such period of time that the aforesaid delivery or acceptance may be rendered impossible by reason of fire, Act of God or government regulation. Provided, however, to the extent that the Bidder has any commercially reasonable alternative method of performing this Pricing Agreement/Contract by purchase on the market or otherwise, the Bidder shall not be freed of any obligations hereunder by this clause, even though the goods intended for this Pricing Agreement/Contract were destroyed or their delivery delayed because of an event described above.

13. The shipping or receiving of any goods under this Pricing Agreement/Contract shall not be deemed, or be, a waiver of any right to damages for any prior failure to ship or receive any goods.

14. This Pricing Agreement/Contract shall be governed by the laws of the State of Oklahoma.

15. The Bidder shall be responsible for complying with all applicable federal, state and local laws.

16. If submitting a bid for services, the Bidder certifies that they, and any proposed subcontractors, are in compliance with 25 O.S. §1313 and participate in the status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and available at www.dhs.gov/E-Verify.

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The undersigned individual states that the Bidder will be bound by all components of its bid, the specification, the terms and conditions of the Pricing Agreement/Contract, and the requirements for Bidders.

WITNESS the hands of the parties hereto:

THIS FORM MUST BE ELECTRONICALLY SIGNED AND SUBMITTED WITH THE BID FOR THE BID TO BE VALID

Note: The owner or an officer of the business or corporation may sign this document. A Corporate Seal or a letter of authorization is needed for any other signer. For instance, if a Salesman or Manager signs this form, a letter of authorization or Corporate Seal is to be attached.

Matt Olson

Type Name of Authorized Agent

President

Title of Authorized Agent

**Jackson Mechanical Service Inc. - P.O. BOX 18824,OKC, 73154
OK.**

Company Name and Address

Zip Code

mattolson@jmsokc.com

Telephone Number and Fax Number if any

BIDDER MUST ELECTRONICALLY COMPLETE, SIGN AND NOTARIZE THIS DOCUMENT

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Supplier: Jackson Mechanical Service Inc.

NON-COLLUSION AFFIDAVIT

BIDDER MUST ELECTRONICALLY COMPLETE, SIGN AND NOTARIZE THIS DOCUMENT PRIOR TO SUBMITTING BID

Please be aware that typing in your password acts as your electronic signature, which is just as legal and binding as an original signature.

(See Electronic Signatures in Global and National Commerce Act for more information.)

The undersigned, of lawful age, being duly sworn, upon oath, deposes and says: That the undersigned has the lawful authority to execute the within and foregoing proposal/bid for, and on behalf of, the Proposer/Bidder; that the Proposer/Bidder has not, directly or indirectly, entered into any agreement, express or implied, with any Proposer/Bidder, having for its object the controlling of the price or amount of such proposal/bid, the limiting of the proposals/bids or the Proposers/Bidders, the parceling or farming out to any Proposer/Bidder or other persons, of any part of the Agreement or any part of the subject matter of the proposal/bid, or of the profits thereof, and that Proposer/Bidder has not and will not divulge the sealed proposal/bid to any person whomsoever, except those having a partnership or other financial interest with the Proposer/Bidder in the said proposal/bid, until after the said sealed proposals/bids are opened.

The undersigned further states that the Proposer/Bidder has not been a party to any collusion: among Proposer/Bidders in restraint of freedom of competition, by any agreement to bid at a fixed price or to refrain from proposing; or with any City/Trust official, City/Trust employee or City/Trust agent as to the quantity, quality, or price in the prospective Agreement, or any other terms of the said prospective Agreement; or in any discussions between the Proposers/Bidders or City/Trust official, City/Trust employee or City/Trust agent concerning the exchange of money or other thing of value for special consideration in the letting of Agreement. The Proposer/Bidder states that it has not paid, given or donated or agreed to pay, give or donate to any City/Trust official, officer or employee of the City or awarding agency, any money or other thing of value, either directly or indirectly, in the procuring of the award of Agreement pursuant to this Proposal/Bid.

Witness the hands of the parties hereto:

The undersigned states that the Proposer/Bidder will be bound by its proposal/bid, the specification, the terms and conditions of the Agreement, and the Requirements for Proposer/Bidders.

→ →THIS FORM TO BE COMPLETED BY THE PROPOSER/BIDDER PRIOR TO AGREEMENT APPROVAL← ←

Matt Olson
Type Name of Authorized Agent/Representative
Jackson Mechanical Service
Company Name
P.O. Box 18824 OKC, OK
Address
405-525-3788
Telephone Number and Fax Number, if any

President
Title
73154
Zip Code

TO BE COMPLETED BY THE NOTARY:

State of *)
Oklahoma) SSS
County of *)
Oklahoma

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[*State and County where notarized must be typed in for bid/proposal to be considered.][SAK1]

Signed and sworn to before **27** day of **March,** **2023** by **Matt Olson**
me on this
[Day] [Month] [Year] [Print the name of the
agent/representative who signed
above.]

My Commission Number: **16009536** **Amanda Campbell**
[Oklahoma] Type Name of Notary Public
My Commission Expires: **10/05/24**
[Date/Year]

[49 Okla. Stat. 2011 §119]

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Jackson Mechanical Service Inc.

Bid Contact **Larry Beatty**
jimmywood@jmsokc.com
Ph 405-525-3788

Address **P.O. Box 18824**
2600 N. Oklahoma Ave.
Oklahoma City, OK 73154

Qualifications **OKC PRE-QUALIFIED CONTRACTORS**

Item #	Line Item	Notes	Unit Price	Qty/Unit	Attch. Docs
24613--01-01	Chiller Repair, Replacement or Installation: Regular Hour Labor Charge per Hour	Supplier Product Code:	First Offer - \$100.00	1 / hour	\$100.00 Y
24613--01-02	Chiller Repair, Replacement or Installation: Overtime Hour Labor Charge per Hour	Supplier Product Code:	First Offer - \$150.00	1 / hour	\$150.00 Y
24613--01-03	Chiller Repair, Replacement or Installation: Markup on Materials over Contractor's Cost	Supplier Product Code:	First Offer - 30.00%	1 / each	30.00% Y
24613--01-04	Chiller Repair, Replacement or Installation: Service Call Hourly Rate	Supplier Product Code:	First Offer - \$100.00	1 / hour	\$100.00 Y
				Lot Total	\$350.00

Item #	Line Item	Notes	Unit Price	Qty/Unit	Attch. Docs
24613--02-01	Air Conditioning and Heating Services and Repairs: Regular Hour Labor Charge per Hour	Supplier Product Code:	First Offer - \$100.00	1 / hour	\$100.00 Y
24613--02-02	Air Conditioning and Heating Services and Repairs: Overtime Hour Labor Charge per Hour	Supplier Product Code:	First Offer - \$150.00	1 / hour	\$150.00 Y
24613--02-03	Air Conditioning and Heating Services and Repairs: Markup on Materials over Contractor's Cost	Supplier Product Code:	First Offer - 30.00%	1 / each	30.00% Y
24613--02-04	Air Conditioning and Heating Services and Repairs: Service Call Hourly Rate	Supplier Product Code:	First Offer - \$100.00	1 / hour	\$100.00 Y
				Lot Total	\$350.00

Item #	Line Item	Notes	Unit Price	Qty/Unit	Attch. Docs

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24613--03-01	Air Conditioning and Heating Units and Installation: Regular Hour Labor Charge per Hour	Supplier Product Code:	First Offer - \$100.00	1 / hour	\$100.00	Y
24613--03-02	Air Conditioning and Heating Units and Installation: Overtime Hour Labor Charge per Hour	Supplier Product Code:	First Offer - \$150.00	1 / hour	\$150.00	Y
24613--03-03	Air Conditioning and Heating Units and Installation: Markup on Materials over Contractor's Cost	Supplier Product Code:	First Offer - 30.00%	1 / each	30.00%	Y
24613--03-04	Air Conditioning and Heating Units and Installation: Service Call Hourly Rate	Supplier Product Code:	First Offer - \$100.00	1 / hour	\$100.00	Y
					Lot Total	\$350.00
Item #	Line Item	Notes	Unit Price	Qty/Unit	Attch. Docs	
24613--04-01	Manufacturer's Factory Training: Factory Training	Supplier Product Code:	First Offer -	1 / each	Y	Y
					Lot Total	\$0.00
Item #	Line Item	Notes	Unit Price	Qty/Unit	Attch. Docs	
24613--05-01	Manufacturer's Teardown Manuals: Teardown Manuals	Supplier Product Code: Supplier Notes: files were too large to upload	First Offer -	1 / each	Y	Y
					Lot Total	\$0.00
Item #	Line Item	Notes	Unit Price	Qty/Unit	Attch. Docs	
24613--06-01	Attachments: Bidder's Current W-9	Supplier Product Code:	First Offer -	1 / each	Y	Y
					Lot Total	\$0.00
					Supplier Total	\$1,050.00

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Jackson Mechanical Service Inc.

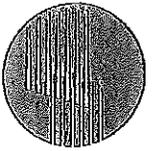
Item: **Manufacturer's Factory Training:Factory Training**

Attachments

Jackson Mechanical Training certificates.pdf

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TRANE[®]

EDUCATIONAL DIVISION

This Certifies That

KURT STANGEG

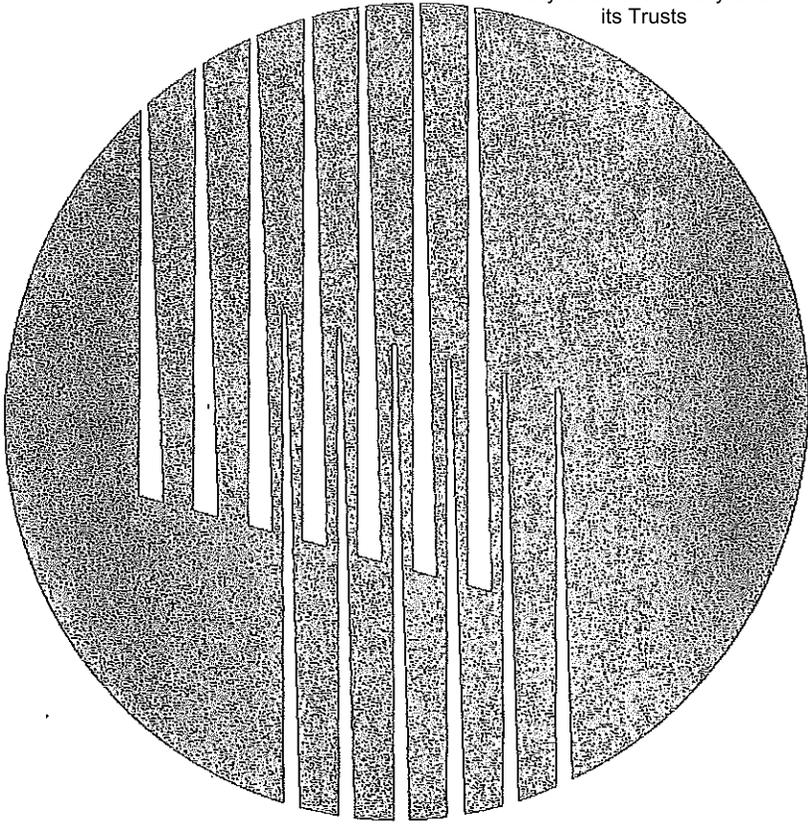
COPY

has satisfactorily completed the courses in refrigeration theory and application comprising the

TRANE AIR CONDITIONING CLINIC

INCLUDING STUDIES IN

The Basic Refrigeration Cycle ... Individual Components Of An Air Conditioning System ... Cooling Load Estimating ... Psychrometry ... Refrigeration And System Controls ... Design, Sizing And Installation Of Refrigeration Piping



November 28, 2000

DATE

INSTRUCTOR

OFFICE MANAGER

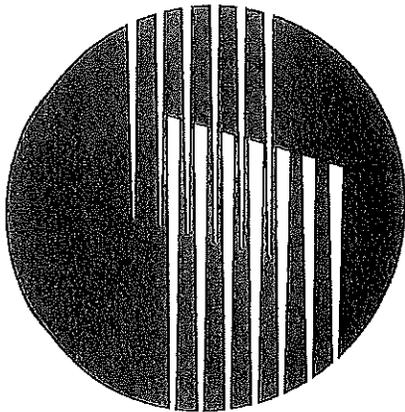
LEARNING CENTER

CERTIFICATE OF COMPLETION

TRANE®

COPY
Kurt Stange

has satisfactorily completed the



COPY
*CH530 Control for
CVHE/F/G -
"RTAC Chillers"*

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February 13-14, 2003
Date

María Segovia

María Segovia, Training Coordinator

Certificates of Completion

Presented to
Kurt Stange
JOHNSON CONTROLS Inc. - Oklahoma City, OK Svc Ofc

for attending the
FRICK QUANTUM TRAINING SCHOOL
October 26, 2006



Arthur Ward Gardner
Industrial Safety Training Center Director

Don O'Connell
Instructor

JOHNSON
CONTROLS
FRICK

COPY COPY COPY COPY COPY



YCAV Latitude Chiller

COPY

1.60 CEU

Awarded to

Greg W. Manhalter

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[Signature]
Course Administrator

VA Cavanaugh
Vice President, Learning & Development

October 24, 2008
Date

JOHNSON
CONTROLS

Eco2 YPAL Packaged RTU

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2.00 CEU

COPY

Awarded to

Greg W. Manhalter



[Handwritten Signature]
Course Administrator

February 27, 2008

Date

C249033



This certifies that

KURT STANGIE

LATITUDE CLASS

(6 HRS)

APRIL 12-13, 2005



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DUNHAM-BU...

DEPT

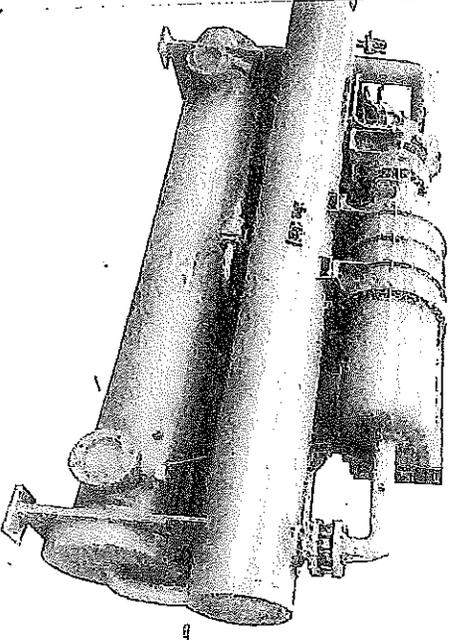
Mr. Kurt R. Stange

on this the 22nd day of

NOVEMBER

For The Satisfactory Completion of the
Dunham - Bank
Medical Rotary Sewer Compression

Feminine
FOR

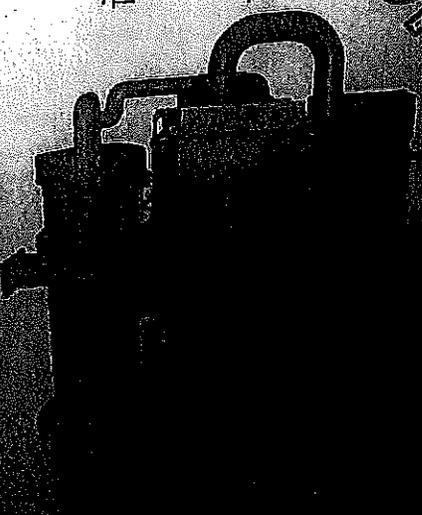


Handwritten signature: *Wood*

11-22-91
Date

Handwritten signature: *W...*

11-22-91
Date



This is to certify that

GREG MANHALTER

Has Successfully Completed the

YORKSTAR Training

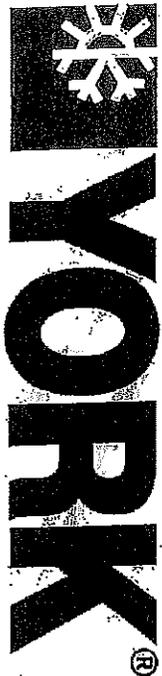
MILLENNIUM TRAINING

11/19/2004

Norm Christopherson

Norm Christopherson

Yorkstar Certified Training Instructor



Heating and Air Conditioning

Nate Registration Number: 1015-0012 - 16 Hours

COPY MILLENNUIUM TRAINING COPY

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This certifies that

KURT STANGEL

LATITUDE CLASS

(16 HRS)

APRIL 12-13, 2005



has successfully completed an educational program in:

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Certificate of Completion

Presented to

Kurt Stange

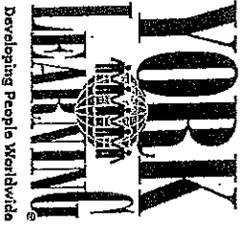
for successfully completing

ESG Service Sales Training

Atlanta - May 15-18, 2000



Rodney W. Hightower
VP Global Sales & Service
Engineered Systems Group



John C. Fink III
VP & General Manager
ESG Global AfterMarket

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DUNHAM-BUSH

Certificate

of

on this the 22nd day of November 1921

For the Satisfactory Completion of the

Dunham-Bush

Vertical Mechanical Rotary Sewer Coping
Training Seminar

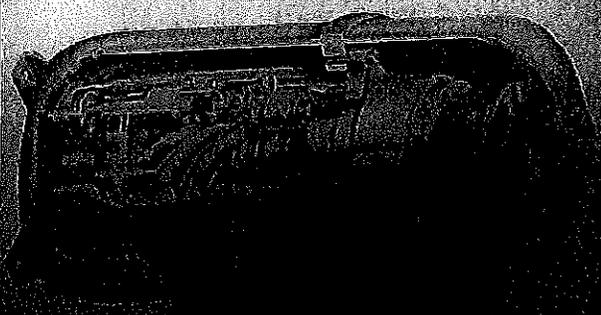
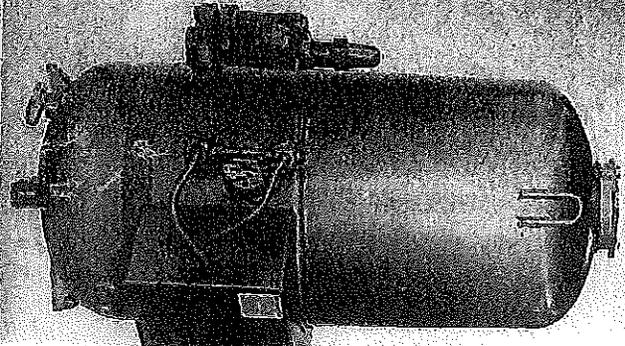
COP



Alfred Rogers
Instructor
11-22-91
Dated

Alfred Rogers
National Sewer Manager
11-22-91
Dated

W. J. ...
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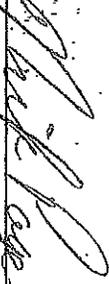
GREG M. J. V. H. ALTMER

has successfully completed an educational program in:

Variable Speed Drive Service Training

24 Hours

NOVEMBER 8 - 10, 2005

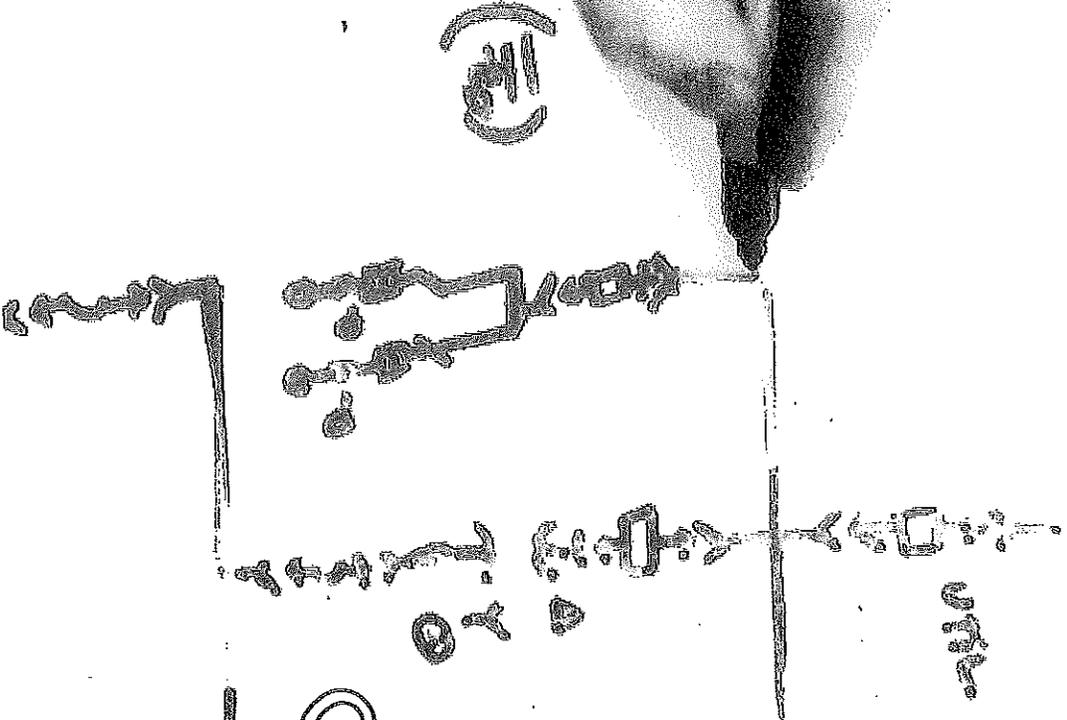

Nick Page, Tech. Regional Trainer


Larry Swainiger - Senior Trainer

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COPY 24613



Greg Manhalter
has successfully completed:

Eaton VFD's:
MVX and GVX Overview

Hands-on Training

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EATON
Powering Business Worldwide

Tom Neuberger
Eaton Industrial Control Division
Product Manager – VFD's





Metasys FEC Systems Engineering

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2.00 CEU

Awarded to

Greg W. Manhalter

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Course Administrator

VA Cavanaugh

Vice President, Learning & Development

March 25, 2011

Date

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This certifies that

GREG MANHALTER

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has successfully completed an educational program in:
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ISN CONNEXSYS OWS

COMMISSIONING TRAINING

(24 HOURS)

NOVEMBER 1 - 3, 2005

Deneen Knuckles
Deneen Knuckles, Training Specialist

C249033



awards this

Certificate of Achievement

COPY

to
Kirt Stange

COPY

for completing all the requirements of the

30GTN Chiller Seminar

A handwritten signature in cursive script, appearing to read "James P. Carby".

March 13 - 14, 2001
DATE

C O N T A C T I N F O R M A T I O N



awards this

Certificate of Achievement

to

Kurt R. Stange

for completing all the requirements of the

30GTN chiller Seminar

A handwritten signature in cursive script that reads "James R. Curbly".

March 13 - 14, 2001
DATE

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YORK

This certifies that

KURT STAVGE

has successfully completed an educational program in

York Water-cooled Screw Chillers

Operation & Maintenance

August 7 - 9, 2001

YORK Engineered
Systems Group
YORK INTERNATIONAL

GOPN

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This certifies that

KURT STANGHE

has successfully completed an educational program in:

Variable Speed Drive Service Training

24 Hours

SEPTEMBER 21 - 23, 2004



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Entech Sales and Service, Inc.

Certifies that

John Birdsong

Has completed

40 Hours of Continuing Education

Trane Centrifugal Teardown Training

John P. Mattes

John P. Mattes

V.P.

October 20th 2017



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Entech Sales and Service, Inc.

Certifies that

John Birdsong

Has completed

40 Hours of Continuing Education

York Centrifugal Tardown Training

John P. Mattes

John P. Mattes

V.P.

November 10th 2017



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Entech Sales and Service, Inc.

Certifies that

John Birdsong

Has completed

40 Hours of Continuing Education

Carrier Centrifugal Tardown Training

John P. Mattes

John P. Mattes

V.P.

December 4th-8th 2017



Certificate of Training

This is to certify that

Greg Manhalter
Jackson Mechanical Service Inc.

has completed a training course covering the various technical modules detailed below.

19th – 21st January 2021

- Module 1: Burner Management and Control. Fuel/Air Ratio. Sequencing.**
- Module 2: Exhaust Gas Analysis. 3 Parameter Trim. Emissions Monitoring.**
- Module 3: DTI System. Data Acquisition. Remote Control.**
- Module 4: End User Operation and Basic Fault Finding.**

Trainer
Initials

PC
PC
PC
PC

Awarded 4 Professional Development Hours

Paul Cooper
General Manager



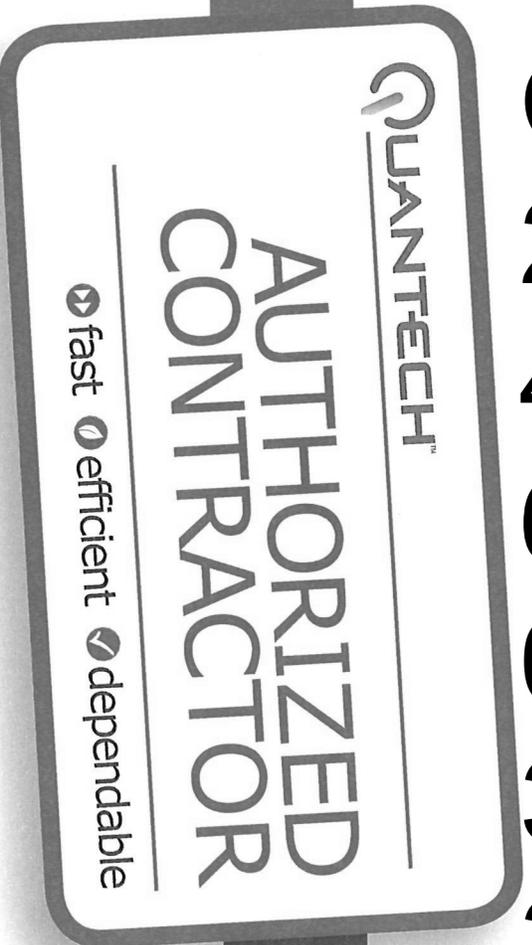
Autoflame USA

4601 S. Palisade
Wichita Ks 67217
316-425-3614



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This recognizes that

GREGORY MANHALTER

has completed the qualifications training and is an Authorized Contractor for Quantech scroll-based equipment.

Tom Tuchnowski

Tom Tuchnowski

4th Year of service
 Authorization valid through
 August 13, 2022

Vice President, Applied Commercial Sales & Distribution-NA | Quantech | Johnson Controls Inc.



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Certificate of Achievement

This certifies that

Gregory Manhalter

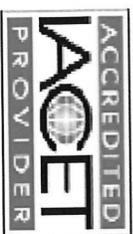
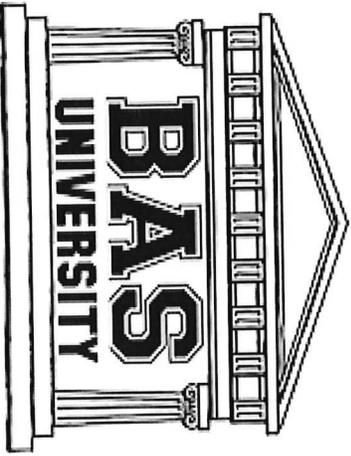
has successfully completed

CCE 2019 Breakout Session - Networking and TPI

on 9 May 2019

0.2 CEUs Awarded

5cd4cec8-5814-4eee-be0d-586c0a0b0163



0249033

Certificate of Achievement

This certifies that

Gregory Manhalter

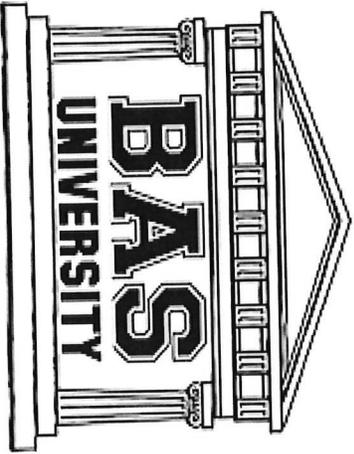
has successfully completed

CCE 2019 Breakout Session - I-VU 7 Add-Ons Eco-Reports

on 9 May 2019

0.2 CEUs Awarded

Scd4af40-0f5c-4dd2-874d-5bdf0a0b0163



0249033

Certificate of Achievement

This certifies that

Gregory Manhalter

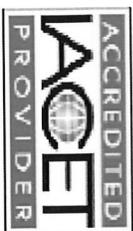
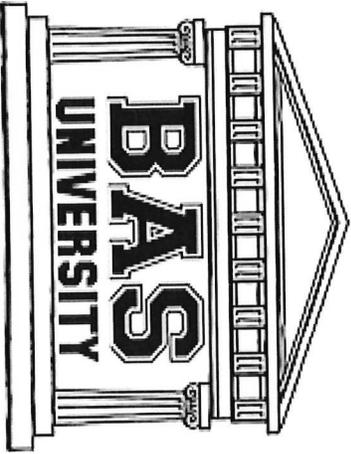
has successfully completed

CCE 2019 Breakout Session - Advanced Reporting

on 9 May 2019

0.2 CEUs Awarded

5cd4a7c5-2ab0-4007-ab92-5bdf0a0b0163



C 2 4 9 0 3 3

Carrier Controls proudly recognizes

Gregory Manhalter

for successfully completing

CEE-E005.160825 ComfortDRAW/Visio - Working with Shapes Project Engineering Training course



Date: 25 April 2018

A handwritten signature in black ink, appearing to read "D. Forio".

Dominic Forio
Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3

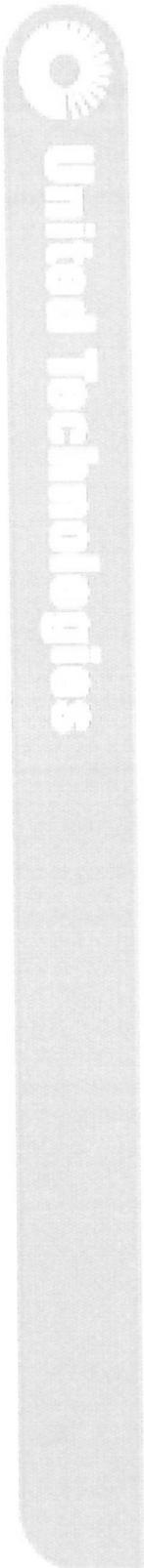
Carrier Controls proudly recognizes

Gregory Manhalter

for successfully completing

CCE-E004.160624 ComfortDRAW/Visio - Using Smart Shapes & Stencils

Project Engineering Training course



Date: 24 April 2018

A handwritten signature in black ink, appearing to read "D. Forio", written over a horizontal line.

Dominic Forio
Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3

Carrier Controls proudly recognizes

Gregory Manhalter

for successfully completing

CEE-E003.160624 ComfortDRA W/Visio - Creating a System Riser Diagrams

Project Engineering Training course



Date: 24 April 2018

A handwritten signature in black ink, appearing to read "D. Eorio".

Dominic Eorio
Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3

Carrier Controls proudly recognizes

Gregory Manhalter

for successfully completing

CEE-E002.160624 ComfortDRA W/Visio Navigating Stencils & Pages

Project Engineering Training course



United Technologies

Date: 16 April 2018



Dominic Eorio
Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3

Carrier Controls proudly recognizes

Gregory Manhalter

for successfully completing

CEE-E001.160624 Intro to ComfortDRAW for System Design

Project Engineering Training course



Date: 16 April 2018

A handwritten signature in black ink, appearing to read "D. Forio".

Dominic Forio
Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3

Certificate of Completion

This certifies that

Gregory Manhalter

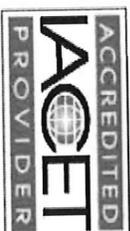
has successfully completed

ES - TPI Third Party Integration

on 6 April 2018



2.4 CEUs Awarded



United Technologies
Climate | Controls | Security

Climate | Controls | Security

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C 2 4 9 0 3 3

Certificate of Completion

This certifies that

Gregory Manhalter

has successfully completed

ES - TPI Third Party Integration

on 6 April 2018



4ac8f2f0-39c4-11e8-9ec6-990c20dda7e9

C 2 4 9 0 3 3



CARRIER PROUDLY RECOGNIZES
Gregory Manhalter
FOR SUCCESSFULLY PASSING THE
2017 IS Annual Update Exam

Bob Hatke

Bob Hatke
Controls Specialist
Carrier Direct Sales, Oklahoma City

Date Issued: 12/5/2017

Dominic Eorio

Dominic Eorio
Carrier Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3



CARRIER PROUDLY RECOGNIZES
Gregory Manhalter
FOR SUCCESSFULLY PASSING THE
2017 CS Annual Update Exam

Bob Hatke

Bob Hatke
Controls Specialist
Carrier Direct Sales, Oklahoma City

Date Issued: 10/25/2017

Dominic Eorio

Dominic Eorio
Carrier Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3



CARRIER PROUDLY RECOGNIZES
Gregory Manhalter
FOR SUCCESSFULLY PASSING THE
IS-2 Exam

Robert Hatke

Bob Hatke
Controls Specialist
Carrier Direct Sales, Oklahoma City

Date Issued: 9/15/2017

Dominic Eorio

Dominic Eorio
Carrier Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3



CARRIER PROUDLY RECOGNIZES
Gregory Manhalter
FOR SUCCESSFULLY PASSING THE
IS-1 Exam

Bob Hatke

Bob Hatke
Controls Specialist
Carrier Direct Sales, Oklahoma City

Date Issued: 9/14/2017

Dominic Eorio

Dominic Eorio
Carrier Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3



CARRIER PROUDLY RECOGNIZES
Gregory Manhalter
FOR SUCCESSFULLY PASSING THE
CS-2 EXAM

Bob Hatke

Bob Hatke
Controls Specialist
Carrier Direct Sales, Oklahoma City

Date Issued: 9/1/2017

Dominic Eorio

Dominic Eorio
Carrier Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3

Certificate of Completion

This certifies that

Gregory Manhalter

has successfully completed

CS - 1 & 2 Carrier Comfort Systems

on 1 September 2017



3.2 CEUs Awarded



United Technologies

Climate | Controls | Security

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©Automated Logic Corporation is an accredited provider of the International Association for Continuing Education and Training.

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CARRIER PROUDLY RECOGNIZES
Gregory Manhalter
FOR SUCCESSFULLY PASSING THE
CS-1 EXam

Bob Hatke

Bob Hatke
Controls Specialist
Carrier Direct Sales, Oklahoma City

Date Issued: 8/30/2017

Dominic Eorio

Dominic Eorio
Carrier Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3



CARRIER PROUDLY RECOGNIZES
Gregory Manhalter
FOR SUCCESSFULLY PASSING THE
ES-SNAP Custom Programming Exam

Bob Hatke

Bob Hatke
Controls Specialist
Carrier Direct Sales, Oklahoma City

Date Issued: 9/27/2017

Dominic Eorio

Dominic Eorio
Carrier Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3



CARRIER PROUDLY RECOGNIZES
Gregory Manhalter
FOR SUCCESSFULLY PASSING THE
ES Elective - ChillerVu Exam

Robert Hatke

Bob Hatke
Controls Specialist
Carrier Direct Sales, Oklahoma City

Date Issued: 9/29/2017

Dominic Eorio

Dominic Eorio
Carrier Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3

Certificate of Completion

This certifies that

Gregory Manhalter

has successfully completed

ES - TPI Third Party Integration

on 6 April 2018



2.4 CEUs Awarded



United Technologies
Climate | Controls | Security

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C 2 4 9 0 3 3

Certificate of Completion

This certifies that

Gregory Manhalter

has successfully completed

IS - 1 & 2 Carrier i-Vu® Systems

on 15 September 2017



3.2 CEUs Awarded



United Technologies

Climate | Controls | Security

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©Automated Logic Corporation is an accredited provider of the International Association for Continuing Education and Training.

C 2 4 9 0 3 3



CARRIER PROUDLY RECOGNIZES

Gregory Manhalter

FOR SUCCESSFULLY PASSING THE

2019 CS Annual Update Exam

Robert Hatcher

Service Account
Controls Specialist
Carrier Direct Sales, Oklahoma City

Date Issued: 0/21/2019

D. Forio

Dominic Forio
Carrier Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3



CARRIER PROUDLY RECOGNIZES

Gregory Manhalter

FOR SUCCESSFULLY PASSING THE

2019 CS Annual Update Exam

Randy Hatcher

Service Account
Controls Specialist
Carrier Direct Sales, Oklahoma City

Date Issued 10/21/2019

D. Forio

Dominic Forio
Carrier Controls Expert Program Manager
Carrier Corporation

C 2 4 9 0 3 3

CERTIFICATE OF COMPLETION

TCS ACADEMY

Presented to

Greg Manhalter

for successfully completing

TCS Technical Training

April 5 - 9, 2021

Brian Tarbert/VP Business Development



David Doll, Chief Operations Officer



The Genius of Simple

Supplier: Jackson Mechanical Service Inc.

Contractor Questionnaire

Show evidence of having satisfactorily serviced, maintained, and repaired units of 250 tons or larger by providing a list of five (5) jobs wherein teardown and rebuilding of these units was accomplished within the past three years including persons to contact.

Company Name:**COSTCO**
Name of Contact:**MIRANDA CLARK**
Phone Number:**405-832-5600**
Description of Service Provided:**MAINTENANCE AND REPAIR ON TRANE 600 TON CHILLERS**
Dates of Service:**2/2022**

Company Name:**TINKER AFB**
Name of Contact:**RON PULLIN**
Phone Number:**405-249-6081**
Description of Service Provided:**MAINTENANCE AND REPAIR ON CARRIER 500 TON CHILLERS**
Dates of Service:**4/2023**

Company Name:**STATE OF OKLAHOMA - CONNORS BUILDING**
Name of Contact:**PATRICK BOWERS**
Phone Number:**405-882-9614**
Description of Service Provided:**MAINTENANCE ON YORK 600 TON CHILLERS**
Dates of Service:**3/2023**

Company Name:**SAINT ANTHONY HOSPITAL - DOWNTOWN CAMPUS**
Name of Contact:**MIKE WISE**
Phone Number:**405-985-8583**
Description of Service Provided:**MAINTENANCE ON TRANE 1000 TON CHILLERS**
Dates of Service:**4/2022**

Company Name:**ALLIANCE HEALTH - PONCA CITY**
Name of Contact:**WILLIAM COOMER**
Phone Number:**580-765-0554**
Description of Service Provided:**MAINTENANCE AND REPAIR ON 450 TON CARRIER**
Dates of Service:**5/2023**

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Provide written evidence of having access to factory parts on a 24-hour basis.

We have personal contacts for manufacturer representatives for the following manufacturers: Trane, Carrier, York

List any exceptions to Section I of the bid specifications – Chiller Repair, Replacement, or Installation:

NONE

List any exceptions to Section II of the bid specifications - Bidder Qualifications:

None

List any exceptions to Section III of the bid specification - Materials and Workmanship :

None

List any exceptions to Section IV of the bid specifications –Air Conditioning and Heating Services:

None

List any exceptions to Section V of the bid specifications –Air Conditioning/Heating Units and Equipment Installation Services:

None

List any exceptions to Section VI of the bid specifications –Contractor shall comply with EPA, OSHA, and other government regulations set forth in the Clean Air Act:

None

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Solicitation 24613

AIR CONDITIONING, HEATING, AND CHILLER INSTALLATION, REPAIR & REPLACEMENT SERVI

Bid Designation: Public



City of Oklahoma City and its Trusts

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Bid 24613

AIR CONDITIONING, HEATING, AND CHILLER INSTALLATION, REPAIR & REPLACEMENT SERVI

Bid Number **24613**
Bid Title **AIR CONDITIONING, HEATING, AND CHILLER INSTALLATION, REPAIR & REPLACEMENT SERVI**
Expected Expenditure **\$1,500,000.00** (This price is expected - not guaranteed)

Bid Start Date **Apr 26, 2023 7:51:00 AM CDT**
Bid End Date **May 17, 2023 10:00:00 AM CDT**
Question & Answer End Date **May 11, 2023 12:00:00 PM CDT**

Bid Contact **Monica Hardesty**
monica.hardesty@okc.gov

Bid Contact **City Clerk**
cityclerk@okc.gov

Bid Contact **Billy Bray**
billy.bray@okc.gov

Contract Duration **1 year**
Contract Renewal **2 annual renewals**
Prices Good for **Not Applicable**

Standard Disclaimer **This site and system is hosted by Oklahoma City through BIDSYNC for use of The City of Oklahoma City and its trusts.
Certain screens and flags may show the name and/or seal of The City; however, such references do not indicate or change the contracting entity.**

Bid Comments **INTENT: To obtain pricing agreements for labor and materials to repair and/or install various air conditioning, heating and chiller units for various City departments and Trusts.**

The Expected Expenditure amount of \$1,500,000 for this commodity is an estimate for a one-year period based on past history and future projections. The quantity of any item when shown in the price schedule as an estimate of an annual requirement is only an estimate based on currently available information. The purchase of any such item or quantity is not guaranteed. Any offer conditioned upon a promise by the Contracting Entity to purchase a minimum or definite quantity of such an item will be rejected. See the specification bid packet for more information.

Please do not zip files

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Item Response Form

Item **24613-01-01 - Chiller Repair, Replacement or Installation: Regular Hour Labor Charge per Hour**
Lot Description **Chiller Repair, Replacement or Installation**
Quantity **1 hour**
Unit Price
Delivery Location **City of Oklahoma City and its Trusts**
[See Bid Packet for Location\(s\)](#)
N/A
Oklahoma City OK 73102
Qty 1

Description

Chiller Repair, Replacement or Installation

Item **24613-01-02 - Chiller Repair, Replacement or Installation: Overtime Hour Labor Charge per Hour**
Lot Description **Chiller Repair, Replacement or Installation**
Quantity **1 hour**
Unit Price
Delivery Location **City of Oklahoma City and its Trusts**
[See Bid Packet for Location\(s\)](#)
N/A
Oklahoma City OK 73102
Qty 1

Description

Chiller Repair, Replacement or Installation

Item **24613-01-03 - Chiller Repair, Replacement or Installation: Markup on Materials over Contractor's Cost**
Lot Description **Chiller Repair, Replacement or Installation**
Quantity **1 each**
Percentage
Delivery Location **City of Oklahoma City and its Trusts**
[See Bid Packet for Location\(s\)](#)
N/A
Oklahoma City OK 73102
Qty 1

Description

Chiller Repair, Replacement or Installation

Item **24613-01-04 - Chiller Repair, Replacement or Installation: Service Call Hourly Rate**
Lot Description **Chiller Repair, Replacement or Installation**
Quantity **1 hour**
Unit Price
Delivery Location **City of Oklahoma City and its Trusts**
[See Bid Packet for Location\(s\)](#)
N/A
Oklahoma City OK 73102
Qty 1

Description

Enter hourly rate for service call (if applicable).

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Item **24613-02-01 - Air Conditioning and Heating Services and Repairs: Regular Hour Labor Charge per Hour**
 Lot Description **Air Conditioning and Heating Services and Repairs**
 Quantity **1 hour**
 Unit Price
 Delivery Location **City of Oklahoma City and its Trusts**
See Bid Packet for Location(s)
 N/A
 Oklahoma City OK 73102
Qty 1

Description
 Chiller Repair, Replacement or Installation

Item **24613-02-02 - Air Conditioning and Heating Services and Repairs: Overtime Hour Labor Charge per Hour**
 Lot Description **Air Conditioning and Heating Services and Repairs**
 Quantity **1 hour**
 Unit Price
 Delivery Location **City of Oklahoma City and its Trusts**
See Bid Packet for Location(s)
 N/A
 Oklahoma City OK 73102
Qty 1

Description
 Chiller Repair, Replacement or Installation

Item **24613-02-03 - Air Conditioning and Heating Services and Repairs: Markup on Materials over Contractor's Cost**
 Lot Description **Air Conditioning and Heating Services and Repairs**
 Quantity **1 each**
 Percentage
 Delivery Location **City of Oklahoma City and its Trusts**
See Bid Packet for Location(s)
 N/A
 Oklahoma City OK 73102
Qty 1

Description
 Chiller Repair, Replacement or Installation

Item **24613-02-04 - Air Conditioning and Heating Services and Repairs: Service Call Hourly Rate**
 Lot Description **Air Conditioning and Heating Services and Repairs**
 Quantity **1 hour**
 Unit Price
 Delivery Location **City of Oklahoma City and its Trusts**
See Bid Packet for Location(s)
 N/A

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Oklahoma City OK 73102

Qty 1

Description

Enter hourly rate for service call (if applicable).

Item **24613-03-01 - Air Conditioning and Heating Units and Installation: Regular Hour Labor Charge per Hour**

Lot Description **Air Conditioning and Heating Units and Installation**

Quantity **1 hour**

Unit Price

Delivery Location **City of Oklahoma City and its Trusts**

[See Bid Packet for Location\(s\)](#)

N/A

Oklahoma City OK 73102

Qty 1

Description

Chiller Repair, Replacement or Installation

Item **24613-03-02 - Air Conditioning and Heating Units and Installation: Overtime Hour Labor Charge per Hour**

Lot Description **Air Conditioning and Heating Units and Installation**

Quantity **1 hour**

Unit Price

Delivery Location **City of Oklahoma City and its Trusts**

[See Bid Packet for Location\(s\)](#)

N/A

Oklahoma City OK 73102

Qty 1

Description

Chiller Repair, Replacement or Installation

Item **24613-03-03 - Air Conditioning and Heating Units and Installation: Markup on Materials over Contractor's Cost**

Lot Description **Air Conditioning and Heating Units and Installation**

Quantity **1 each**

Percentage

Delivery Location **City of Oklahoma City and its Trusts**

[See Bid Packet for Location\(s\)](#)

N/A

Oklahoma City OK 73102

Qty 1

Description

Chiller Repair, Replacement or Installation

Item **24613-03-04 - Air Conditioning and Heating Units and Installation: Service Call Hourly Rate**

Lot Description **Air Conditioning and Heating Units and Installation**

Quantity **1 hour**

Unit Price

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Delivery Location **City of Oklahoma City and its Trusts**
[See Bid Packet for Location\(s\)](#)
N/A
Oklahoma City OK 73102
Qty 1

Description

Enter hourly rate for service call (if applicable).

Item **24613-04-01 - Manufacturer's Factory Training: Factory Training**

Lot Description **Manufacturer's Factory Training**

Quantity **1 each**

Prices are not requested for this item.

Delivery Location **City of Oklahoma City and its Trusts**
[See Bid Packet for Location\(s\)](#)
N/A
Oklahoma City OK 73102
Qty 1

Description

Attach evidence of certified factory training to this line item and type the manufacturer's name in the Buyer note field.

Item **24613-05-01 - Manufacturer's Teardown Manuals: Teardown Manuals**

Lot Description **Manufacturer's Teardown Manuals**

Quantity **1 each**

Prices are not requested for this item.

Delivery Location **City of Oklahoma City and its Trusts**
[See Bid Packet for Location\(s\)](#)
N/A
Oklahoma City OK 73102
Qty 1

Description

Attach evidence of having manufacturers' "teardown" manuals for the specific machines to be covered.

Item **24613-06-01 - Attachments: Bidder's Current W-9**

Lot Description **Attachments**

Quantity **1 each**

Prices are not requested for this item.

Delivery Location **City of Oklahoma City and its Trusts**
[See Bid Packet for Location\(s\)](#)
N/A
Oklahoma City OK 73102
Qty 1

Description

Attach W-9 on the most current IRS FORM.

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**BID/PRICING AGREEMENT/CONTRACT FORM & NON-DISCRIMINATION
STATEMENT**
**BIDDER MUST ELECTRONICALLY COMPLETE, SIGN AND NOTARIZE THIS
DOCUMENT PRIOR TO SUBMITTING IN THE ELECTRONIC BID SYSTEM**

**Please be aware that typing in your password acts as your electronic signature, which is
just as legal and binding as an original signature.**

(See Electronic Signatures in Global and National Commerce Act for more information.)

**THIS DOCUMENT MUST BE ELECTRONICALLY SIGNED AND SUBMITTED WITH THE BID
OR THE BID WILL BE REJECTED**

INSTRUCTIONS: This document MUST be electronically signed and submitted with the bid for the bid to be valid. Failure to electronically sign the this document prior to submitting the electronic bid will result in rejection of your bid. This document constitutes your bid and will be the Pricing Agreement/Contract document under which you are to perform, should your bid be accepted, so it must be properly and completely executed. It is, therefore, essential that you are aware of its terms, as well as those contained in the specifications.

Submit this electronically signed document, along with all accompanying documents:

THIS PRICING AGREEMENT/CONTRACT is made and entered into, by and between hereinafter referred to as "Bidder" and The City of Oklahoma City, a municipal corporation, or a participating Public Trust of which The City of Oklahoma City is Beneficiary hereinafter referred to as the "Contracting Entity."

WITNESSETH:

WHEREAS, the governing body of the Contracting Entity has approved certain specifications and requested by notice that bids be submitted thereon; and

WHEREAS, this document until executed by the Mayor/Chairman of the Contracting Entity constitutes the Bidder's proposal; and

NOW, THEREFORE, that in consideration of the covenants, agreements and representations as hereinafter set forth, it is mutually agreed by the parties that:

1. The Bidder agrees to sell and deliver to the Contracting Entity, the items of material and/or services, specified in the pricing section of the electronic bid submittal, which is attached hereto and made a part of this Pricing Agreement/Contract. List the prompt payment discount, if any, for this agreement in the space provided below:

Discount for Prompt Payment % Days

2. The Bidder expressly warrants that all articles, material, and/or work covered in this Pricing Agreement/Contract will conform to the specifications and electronic bid documents attached to this bid and are hereby incorporated, as if set forth in full herein; and further warrants that the same shall be of good material and workmanship, and free from defects.

3. The Bidder understands that all bids are to be submitted in U.S. dollars at a firm price. Bids submitted in any currency other than U.S. dollars will be rejected.

4. The Bidder also understands that all invoices shall be submitted in U.S. dollars and agrees to accept payment in U.S. dollars as full satisfaction of the invoiced amount.

5. If any of the goods fail to meet the warranties contained in Paragraph 2, above, the Bidder, upon notice from the Contracting Entity, shall promptly correct or replace the same at the Bidder's expense. If the Bidder shall fail to so do, the Contracting Entity may cancel this order as to all such goods, and in addition, may cancel the then remaining balance of this order. After notice to the Bidder, all such goods will be held at the Bidder's risk. The Contracting Entity may, at the Bidder's direction, make available such goods to be returned to the Bidder at the Bidder's

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risk, and all transportation charges, both to and from the original destination, shall be paid by the Bidder. Any payment for such goods shall be refunded by the Bidder unless the Bidder promptly corrects or replaces the same at the Bidder's expense.

6. The Contracting Entity agrees to pay to the Bidder the price and amount in accordance with Paragraph 1 above, based on the quantity actually purchased, upon delivery to and acceptance by the Contracting Entity, of the material and/or service[s] above described and upon the filing by the Bidder, and approval by the Contracting Entity, of a verified claim for the amount due.

7. The Bidder agrees, in connection with the performance of work under this Pricing Agreement/Contract:

a. That the Bidder will not discriminate against any employee or applicant for employment, because of race, creed, color, sex, age, national origin, ancestry or disability. The Bidder shall take affirmative action to ensure that employees are treated without regard to their race, creed, color, age, national origin, sex, ancestry or disability. Such actions shall include, but not be limited to, the following: employment, promotion, demotion or transfer, recruitment, advertising, lay-off, termination, rates of pay or other forms of compensation and selection for training, including apprenticeship. The Bidder agrees to post, in a conspicuous place available to employees and applicants for employment, notices to be provided by the City Clerk/Secretary of the Contracting Entity setting forth the provisions of this section, and;

b. That the Bidder agrees to include this non-discrimination clause in any subcontracts connected with the performance of this Pricing Agreement/Contract.

8. In the event of the Bidder's non-compliance with the above non-discrimination clause, this Pricing Agreement/Contract may be canceled or terminated by the Contracting Entity. The Bidder may be declared by the Contracting Entity ineligible for further Pricing Agreement[s]/Contract[s] with the Contracting Entity until satisfactory proof of intent to comply is made by the Bidder.

9. The risk of loss or damage shall be borne by the Bidder at all times until the acceptance of goods, properly packed, by the Contracting Entity.

10. This Pricing Agreement/Contract, specifications, electronic bid submittal documents and any attachments constitutes the entire understanding and agreement of the parties upon the subject matter hereof. There is no agreement, oral or otherwise, which is not contained in or attached to this Pricing Agreement/Contract. This Pricing Agreement/Contract may not be modified or assigned unless approved in writing and signed by both parties.

11. The parties assume and understand that the variables in the Bidder's cost of performance may fluctuate; consequently, the parties agree that any fluctuations in the Bidder's costs will not alter the Bidder's obligations under this Pricing Agreement/Contract nor excuse performance or delay on the Bidder's part.

12. This Pricing Agreement/Contract shall be inoperative during such period of time that the aforesaid delivery or acceptance may be rendered impossible by reason of fire, Act of God or government regulation. Provided, however, to the extent that the Bidder has any commercially reasonable alternative method of performing this Pricing Agreement/Contract by purchase on the market or otherwise, the Bidder shall not be freed of any obligations hereunder by this clause, even though the goods intended for this Pricing Agreement/Contract were destroyed or their delivery delayed because of an event described above.

13. The shipping or receiving of any goods under this Pricing Agreement/Contract shall not be deemed, or be, a waiver of any right to damages for any prior failure to ship or receive any goods.

14. This Pricing Agreement/Contract shall be governed by the laws of the State of Oklahoma.

15. The Bidder shall be responsible for complying with all applicable federal, state and local laws.

16. If submitting a bid for services, the Bidder certifies that they, and any proposed subcontractors, are in compliance with 25 O.S. §1313 and participate in the status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and available at www.dhs.gov/E-Verify.

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The undersigned individual states that the Bidder will be bound by all components of its bid, the specification, the terms and conditions of the Pricing Agreement/Contract, and the requirements for Bidders.

WITNESS the hands of the parties hereto:

THIS FORM MUST BE ELECTRONICALLY SIGNED AND SUBMITTED WITH THE BID FOR THE BID TO BE VALID

Note: The owner or an officer of the business or corporation may sign this document. A Corporate Seal or a letter of authorization is needed for any other signer. For instance, if a Salesman or Manager signs this form, a letter of authorization or Corporate Seal is to be attached.

Type Name of Authorized Agent

Title of Authorized Agent

Company Name and Address

Zip Code

Telephone Number and Fax Number if any

BIDDER MUST ELECTRONICALLY COMPLETE, SIGN AND NOTARIZE THIS DOCUMENT

Please be aware that typing in your password acts as your electronic signature, which is just as legal and binding as an original signature.

(See Electronic Signatures in Global and National Commerce Act for more information.)

THIS FORM MUST BE ELECTRONICALLY SIGNED AND SUBMITTED WITH THE BID OR THE BID WILL BE REJECTED

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NON-COLLUSION AFFIDAVIT

BIDDER MUST ELECTRONICALLY COMPLETE, SIGN AND NOTARIZE THIS DOCUMENT PRIOR TO SUBMITTING BID

Please be aware that typing in your password acts as your electronic signature, which is just as legal and binding as an original signature.

(See Electronic Signatures in Global and National Commerce Act for more information.)

The undersigned, of lawful age, being duly sworn, upon oath, deposes and says: That the undersigned has the lawful authority to execute the within and foregoing proposal/bid for, and on behalf of, the Proposer/Bidder; that the Proposer/Bidder has not, directly or indirectly, entered into any agreement, express or implied, with any Proposer/Bidder, having for its object the controlling of the price or amount of such proposal/bid, the limiting of the proposals/bids or the Proposers/Bidders, the parceling or farming out to any Proposer/Bidder or other persons, of any part of the Agreement or any part of the subject matter of the proposal/bid, or of the profits thereof, and that Proposer/Bidder has not and will not divulge the sealed proposal/bid to any person whomsoever, except those having a partnership or other financial interest with the Proposer/Bidder in the said proposal/bid, until after the said sealed proposals/bids are opened.

The undersigned further states that the Proposer/Bidder has not been a party to any collusion: among Proposer/Bidders in restraint of freedom of competition, by any agreement to bid at a fixed price or to refrain from proposing; or with any City/Trust official, City/Trust employee or City/Trust agent as to the quantity, quality, or price in the prospective Agreement, or any other terms of the said prospective Agreement; or in any discussions between the Proposers/Bidders or City/Trust official, City/Trust employee or City/Trust agent concerning the exchange of money or other thing of value for special consideration in the letting of Agreement. The Proposer/Bidder states that it has not paid, given or donated or agreed to pay, give or donate to any City/Trust official, officer or employee of the City or awarding agency, any money or other thing of value, either directly or indirectly, in the procuring of the award of Agreement pursuant to this Proposal/Bid.

Witness the hands of the parties hereto:

The undersigned states that the Proposer/Bidder will be bound by its proposal/bid, the specification, the terms and conditions of the Agreement, and the Requirements for Proposer/Bidders.

→ → THIS FORM TO BE COMPLETED BY THE PROPOSER/BIDDER PRIOR TO AGREEMENT APPROVAL ← ←

<input type="text"/>	<input type="text"/>
Type Name of Authorized Agent/Representative	Title
<input type="text"/>	
Company Name	<input type="text"/>
<input type="text"/>	Zip Code
Address	
<input type="text"/>	
Telephone Number and Fax Number, if any	

TO BE COMPLETED BY THE NOTARY:

State of *)
<input type="text"/>) SSS
County of *)
<input type="text"/>	

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[*State and County where notarized must be typed in for bid/proposal to be considered.][SAK1]

Signed and sworn to
before me on this

day of

by

[Day]

[Month]

[Year]

[Print the name of the
agent/representative who signed
above.]

My Commission
Number:

[Oklahoma]

Type Name of Notary Public

My Commission
Expires:

[Date/Year]

[49 Okla. Stat. 2011 §119]

BIDDER MUST ELECTRONICALLY COMPLETE, SIGN AND NOTARIZE THIS DOCUMENT PRIOR TO SUBMITTING BID

Please be aware that typing in your password acts as your electronic signature, which is just as legal and binding as an original signature.

(See Electronic Signatures in Global and National Commerce Act for more information.)

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BIDDER MUST ELECTRONICALLY COMPLETE THIS FORM PRIOR TO SUBMITTING BID

SUPPLIER CONTACT INFORMATION

The purpose of this form is to assist various City Departments and Trusts with placing orders.

Sales Contact:

Company Name:

Address:

Contact Person:

Email Address:

Telephone Number:

Fax Number:

Billing Contact:

Company Name:

Address:

Contact Person:

Email Address:

Telephone Number:

Fax Number:

Service Contact:

Company Name:

Address:

Contact Person:

Email Address:

Telephone Number:

Fax Number:

After Hours Emergency Number(s)

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(Published in *The Journal Record* on April 26th, 2023)

NOTICE TO BIDDERS

Notice is hereby given that City of Oklahoma City (“Contracting Entity”) will receive electronic bids at the **OFFICE OF THE CITY CLERK, 200 North Walker Avenue, Oklahoma City, Oklahoma 73102** until 10:00:00 a.m., on the 17th day of May, 2023, for the following:

**BID24613 AIR CONDITIONING, HEATING, AND
CHILLER INSTALLATION, REPAIR & REPLACEMENT SERVICES**

The Contracting Entity has partnered with Periscope (formerly BidSync) to accept bids electronically. You are invited to submit a bid electronically through the Periscope system to supply the goods and/or services specified in the electronic bid packet. The Contracting Entity does not provide access to a computer for electronic bidding or electronic bid submission. Bidders must register in advance with Periscope at <https://prod.bidsync.com/the-city-of-oklahoma-city> in order to submit an electronic bid. The Contracting Entity recommends potential Bidders register and become familiar with the Periscope electronic bidding process in advance of submitting a bid. There is no charge to the Bidder for registering or submitting an electronic bid to the Contracting Entity through Periscope. Instructions on how to get registered to bid through Periscope can be found on The City of Oklahoma City’s website at <https://www.okc.gov/departments/bidding>.

Bids shall be made in accordance with this Notice to Bidder, General Instructions and Requirements for Bidders, Oklahoma Open Records Act and Confidential Information, the Specifications, the Agreement & Non-Discrimination Statement, the Non-Collusion Affidavit, and any other documents which are included in the complete electronic bid packet. The Agreement must be completed, signed, and submitted electronically through Periscope for the bid to be valid.

Bids timely submitted electronically through Periscope shall be opened at the time stated above or later in the City Clerk’s Conference Room, located on the 2nd floor of the Municipal Building. The Periscope system does not allow bids to be submitted after the above stated date and time. There will be no exceptions to this policy. All bids shall remain on file at least 48 hours before an Agreement shall be made and entered.

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The City of OKLAHOMA CITY and its Trusts

ELECTRONIC BID PACKET AIR CONDITIONING, HEATING, AND CHILLER INSTALLATION, REPAIR & REPLACEMENT SERVICES TABLE OF CONTENTS

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GENERAL INSTRUCTIONS AND REQUIREMENTS FOR BIDDERS

THESE INSTRUCTIONS, REQUIREMENTS AND ANY SPECIAL INSTRUCTIONS CONTAINED IN THE SPECIFICATIONS ARE A PART OF THE TERMS AND CONDITIONS OF THE BIDDER'S IRREVOCABLE BID AS A FIRM OFFER. ANY EXCEPTIONS TO THESE INSTRUCTIONS, REQUIREMENTS OR SPECIFICATIONS MUST BE SPECIFIED AND SUBMITTED WITH THE BIDDER'S BID. THIS CAN BE ACCOMPLISHED BY SUBMITTING AN ALTERNATE OFFER, IF AVAILABLE ON THE BID, OR BY ENTERING INFORMATION INTO THE "NOTE TO BUYER" FIELD. A BIDDER MAY ALSO SUBMIT EXCEPTIONS BY UPLOADING A SEPARATE DOCUMENT LABELED "EXCEPTIONS" INTO THE PERISCOPE SYSTEM. FAILURE TO INDICATE ANY EXCEPTIONS WILL BE REGARDED AS FULL ACCEPTANCE OF THE REQUIREMENTS, INSTRUCTIONS, AND SPECIFICATIONS CONTAINED IN THIS BID PACKET AND ANY OTHER BID DOCUMENTS RELATED TO THIS BID.

1. **EXAMINATION BY BIDDERS:** All Bidders must examine the specifications, drawings, schedules, special instructions and these general instructions and requirements prior to electronically submitting any Bid/Pricing Agreement/Contract. Failure to examine is at the Bidder's own risk as Bidder will be held to the terms, conditions and requirements therein.
2. **SUBMISSION OF FORMS REQUIRED FOR PRICING AGREEMENT/CONTRACT AWARD:** All bids must be completed electronically, on the forms provided by the Contracting Entity through the electronic bidding system. Bids will not be considered unless the Bid/Pricing Agreement/Contract form is completed, signed and submitted by the Bidder in the electronic bidding system. A Letter of Authorization should also be attached and submitted when the Bidder is not authorized by statute and the Bidder's organizational and establishing documents to sign and bind the Bidder to the Bid/Pricing Agreement/Contract documents. The Non-Collusion Affidavit must be executed by the Bidder or an authorized agent and notarized. The notarization must contain:
 - (a) The notary's signature (electronic signature);
 - (b) Jurisdiction where notarization took place (i.e., State of __, County of __);
 - (c) Date of notarization;
 - (d) The notary's commission expiration date;
 - (e) The notary's commission number (Oklahoma);
 - (f) The notarial seal (the notary seal is not required for electronic notarization); and
 - (g) Comply with all other applicable laws. The Non-Collusion Affidavit must be submitted electronically with the electronic bid packet.
3. **SUBMISSION OF BIDS ELECTRONICALLY TO THE CITY CLERK/SECRETARY:** Bids must be submitted electronically through Periscope and shall be opened at the time stated in the Notice to Bidders, or later, in the City Clerk's Conference Room, located on the 2nd floor of the Municipal Building. The Periscope system does not allow bids to be submitted after the deadline. There will be no exceptions to this policy. All bids shall remain on file at least 48 hours thereafter before a Pricing Agreement/Contract shall be made and entered into thereon.
4. **DESCRIPTIVE TERMS:** Unless the term "no substitute" is used, the use of brand name, manufacturer, make, or catalog designation in describing an item does not restrict Bidders to that particular brand name, etc. The term is simply to indicate the type, character, quality and/or performance equivalence of the item desired. However, the proposed substitution item must be of such character, quality and/or performance equivalence as that indicated in the specifications. A proposed substitute item must include complete data as to the manufacturer's name, type, model number, any descriptive bulletins and specifications. This data can be uploaded electronically through the electronic bidding system.
5. **EXCEPTIONS:** Any exceptions or variances to these instructions or specifications must be submitted with the Bidder's bid. This can be accomplished by submitting an alternate offer, if available on the bid, or by entering information in the "Note to Buyer" field. A Bidder may also submit exceptions by uploading a separate document labeled "Exceptions" into the Periscope system. Failure to indicate any exceptions will be construed to mean that the Bidder offers to furnish the exact commodity as described in the bid specifications and as full acceptance of the requirements, instructions, and specifications contained in this bid packet and any other bid documents related to this bid.
6. **UNIT PRICES:** A unit price for each unit bid must be shown and include any applicable taxes, delivery, and packaging and/or packing, if any, unless otherwise specified. If there is an estimated quantity stated as such in the specifications, the estimate is not a guarantee of the quantity which may be purchased. When the quantity in the Periscope system is listed as "1", Bidder shall bid the per individual unit price. The Contracting Entity may purchase one or more bid item at any given time throughout the term of the Pricing Agreement/Contract. The Periscope system will calculate the total based on the quantity requested by the Contracting Entity and the price entered by the Bidder. The Periscope system will calculate the bid price based on the quantity and price. Items bid as an estimated quantity will be awarded on a "no guarantee" basis. Prices shall be extended in decimals, not fractions, and shall include transportation and delivery charges, prepaid by the Bidder to the destination specified in the special instructions of the specifications.
7. **EXEMPTIONS FROM CERTAIN TAXES:** The purchase of certain goods or services by the Contracting Entity is exempt from the payment of excise, transportation, use, and sales tax imposed by the federal, state and/or city governments. Such taxes must not be included in the bid prices. Any taxes that are not exempt must be included in the bid price. No additional payment or compensation will be made for taxes.
8. **PAYMENTS AND DISCOUNTS:**

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- (a) Payment for goods and services as specified in the Pricing Agreement/Contract shall be processed promptly after completion of delivery and acceptance of items and after receipt from Bidder of properly prepared invoice(s) and/or notarized claim voucher(s), if applicable. Purchases may be made by certain City or Trust employees using a purchasing card. Employees of Contracting Entity are required, when possible, to use a purchasing card for purchases under the amount of \$5,000 for a single transaction. For single transactions over \$5,000, the Bidder may request payment be completed by issuance of a purchase order. Processing fees may not be added when a purchasing card is used. The bid price shall cover any fees a bidder may incur.
 - (b) Discounts for prompt payment will not be considered in bid evaluations, unless otherwise specified. Discounts offered by the Bidder will be taken, however, if payment is made within the discount period.
 - (c) Late charges cannot be assessed against Contracting Entity.
- 9. LATE INVOICES:** If the purchase order indicates that the purchase is being made with City funds, all unpaid invoices pertaining to this Pricing Agreement/Contract must be recorded in the Finance Department, Accounts Payable Section, or in the Office of the City Clerk on or before September 30 for all debts incurred during the prior fiscal year (July 1 through June 30), or said invoice shall be void and forever barred. (See 62 Okla. Stat. 2010 § 310.4).
- 10. DELIVERY:**
- (a) All bid prices quoted shall be based on delivery F.O.B. Oklahoma City, Oklahoma or to any points located within the municipal corporate limits (unless otherwise stated in the bid specifications) with all charges prepaid to the actual point of delivery.
 - (b) Bids must show the number of days required for delivery under normal conditions. Unrealistically short or long delivery promises may cause bids to be rejected. A successful Bidder is required to keep the purchasing department advised at all times of the status of the order and delivery. All goods or services shall be delivered within thirty (30) days from the date of the award of the Pricing Agreement/Contract, unless specified otherwise.
- 11. AWARD OF PRICING AGREEMENT/CONTRACTS:** The Contracting Entity reserves the rights to: award by item, groups of items or all items of the bid; to reject any or all bids in whole or in part; and, waive technical defects, irregularities and/or omissions.
- 12. PERFORMANCE BONDS:** If required by the specifications, the successful Bidder must post the performance bond, a certified or cashier's check in the amount required prior to award of Pricing Agreement/Contract.
- 13. PATENTS:** The Bidder agrees to indemnify and save harmless the Contracting Entity, including any of Contracting Entity's employees, the purchasing agent and assistants from all suits and actions of every nature and description brought against the Bidder and/or any assistants because of, or for the use of, patented or licensed appliances, products, or processes. The Bidder shall pay all royalties and charges which are legal, and equitable evidence of such payment or satisfaction shall be submitted upon request of the Contracting Entity, as a necessary requirement in connection with the final execution of any Agreement/Contract in which patented or licensed appliances, products, or processes are to be used.
- 14. TERMINATION:**
- (a) The performance of services and/or the delivery of items under any Pricing Agreement/Contract may be terminated by the Contracting Entity, in whole or in part, whenever it is determined to be in the best interest of the Contracting Entity.
 - (b) Any such termination will be effected by delivery to the Bidder of a termination notice specifying the extent to which performance or services and/or delivery of ordered commodities is terminated, and the date the termination becomes effective.
 - (c) After receipt of a termination notice, the Bidder shall stop performance of services and/or accept no further orders under the Pricing Agreement/Contract.
- 15. COMPLIANCE WITH APPLICABLE LAWS:** All Proposers must comply with all applicable federal, state or local laws and regulations, including Title VI and all provisions of the Civil Rights Act of 1964 42, U.S.C. §§ 2000d, -et seq.
- 16. SELF-INSURED:** The Contracting Entity is self-insured for its own negligence. The liability of the Contracting Entity for acts of negligence are limited and subject to the Governmental Tort Claims Act, 51 O.S. §§ 151, *et seq.*
- 17. RIGHT TO AUDIT:** The Contracting Entity shall at all times have the right to examine books, papers and records of the successful Bidder relative to all aspects of the Pricing Agreements/Contracts awarded as a result of this bid to confirm Pricing Agreement/Contract compliance. Failure to provide the requested information may result in termination of the Pricing Agreement/Contract. This right to audit only affects Pricing Agreement/Contract compliance as a result of this bid, and does not apply to Bidder records beyond the scope of the Pricing Agreement/Contract.
- 18. REFERENCES:** The Contracting Entity has the right to request references from bidders.
- 19. BID EVALUATION:** Bids will be evaluated based upon the lowest overall cost to the Contracting Entity and a bidder's responsiveness to the requirements of the specifications. The Contracting Entity retains the right to waive minor deficiencies of specifications, technicalities or informalities in a bid, provided that the best interest of the Contracting Entity would be served without prejudice to the rights of other bidders.

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OKLAHOMA OPEN RECORDS ACT AND CONFIDENTIAL INFORMATION

All materials submitted to the Contracting Entity pursuant to this Bid or Proposal potentially become subject to the mandates of the Oklahoma Open Records Act, 51 O.S. § 24A.1. *et seq.* The purpose of this Act is to ensure and facilitate the public’s right of access to and review of government records so they may efficiently and intelligently exercise their inherent political power. Almost all “records,” as that term is defined in the Act, may be disclosed to the public upon request. Except where specific state or federal statutes create a specific and express exemption or confidential privilege, persons who submit information to public bodies have no right to keep this information from public access nor have a reasonable expectation that this information will be kept from public access.

If you believe that any of the information you have submitted to the Contracting Entity pursuant to this Bid or Proposal is exempt or confidential under a specific state or federal statute, and therefore not subject to public access under the Oklahoma Open Records Act, you must comply with the following:

1. Place said documents/records in a separate electronic file attachment marked “Confidential”. DO NOT label your entire Bid or Proposal as “Confidential” – label only those portions of the Bid or Proposal that you feel are exempt or are made confidential by state or federal law as “Confidential”.
2. For each such document for which you are claiming an exemption or a confidential privilege, identify the federal and/or state law that creates said privilege, e.g., for trade secrets, see 21 O.S. § 1732 (Larceny of Trade Secrets) and the Uniform Trade Secrets Act, 78 O.S. § 85 *et seq.*

Should an Open Records request be presented to the Contracting Entity requesting information you have identified as “Confidential,” you will be responsible for defending your position in the District Court, if needed.

If you fail to identify any records submitted as part of your Bid or Proposal as “Confidential”, you are agreeing that said records are not exempt or confidential and are subject to public access.

Upon receipt of a request by a third party to review or copy records properly identified as “Confidential,” you will be notified of the request and thereby given an opportunity to immediately enforce and protect your rights by initiating an action in a court of competent jurisdiction. Should you fail to timely bring an action to enforce your rights, then the requested records will be released by the Contracting Entity based upon its determination of the application of the Oklahoma Open Records Act.

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BID SPECIFICATIONS

AIR CONDITIONING, HEATING, AND CHILLER INSTALLATION, REPAIR & REPLACEMENT SERVICES

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**BID SPECIFICATIONS
AIR CONDITIONING, HEATING, AND
CHILLER INSTALLATION, REPAIR & REPLACEMENT SERVICES**

Instructions to Bidders

INTENT: To obtain pricing agreements for labor and materials to repair and/or install various air conditioning, heating and chiller units for various City departments and Trusts.

It is anticipated the pricing agreement(s) will be effective on July 1, 2023. The current agreements expire on June 30, 2023.

SCOPE OF PRICING AGREEMENT/CONTRACT: The Bidder shall furnish and supply the below listed item(s) in accordance with the terms, conditions and provisions set forth herein.

The Contracting Entity reserves the right to award this Pricing Agreement/Contract to a single Bidder or to multiple Bidders, whichever is deemed to be in best interest of the Contracting Entity. You may bid on some or all items. If you choose not to bid on one of the items respond by typing, "No Bid" in the "Note to Buyer" field of the Line Item in the Periscope system.

SUBSTITUTE OFFERS: If the bid specifications provide that the Contracting Entity is accepting substitute offers for a good or service, this option will be available for bidders in Periscope when completing the electronic bid packet. The Contracting Entity is under no obligation to accept a substitute offer.

CONTRACTING ENTITY: The term "Contracting Entity" as used throughout this Pricing Agreement/Contract shall mean The City of Oklahoma City and any participating Public Trust which chooses to avail itself of the goods or services from the resultant Pricing Agreement/Contract. Should a participating Public Trust, of which The City of Oklahoma City is Beneficiary, choose to avail itself of goods or services from the resultant Pricing Agreement(s)/Contract(s), the Bidder(s) will honor the terms and conditions, including price, of the Pricing Agreement(s)/Contract(s).

BIDDER: Upon award of this Pricing Agreement/Contract, the term "Bidder" shall mean the contracting party supplying the goods and/or services.

PRICING AGREEMENT/CONTRACT PERIOD: The Pricing Agreement/Contract shall be for one year with the option to renew for two additional one-year periods. The Pricing Agreement/Contract shall be in effect commencing on the date of award as approved by the Contracting Entity.

PRICING AGREEMENT/CONTRACT RENEWAL OPTION:

1. This Pricing Agreement/Contract is renewable for two additional one-year periods at the option of the Contracting Entity. Should the Contracting Entity desire to renew the pricing agreement/contract, a written preliminary notice will be furnished to the Bidder prior to the expiration date of the Pricing Agreement/Contract. (Such preliminary notice will not be deemed to commit the Contracting Entity to renew.)

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2. Upon receipt of the Contracting Entity's preliminary notice, the Bidder shall, if desired, submit a written agreement to continue Pricing Agreement/Contract performance for an additional one-year period.
3. Should the Contracting Entity exercise this option for renewal, the Pricing Agreement/Contract as renewed shall be deemed to include this option provision except that the total duration of this Pricing Agreement/Contract, including any renewals, shall not exceed three years without approval of the Contracting Entity.
4. In all cases Pricing Agreement/Contract renewals must be approved by the Contracting Entity.

DELIVERY: Bidders shall specify their proposed delivery times for the requested goods and services in the Line-Item pricing area in the electronic bidding system. If a deadline is specified and no alternative is proposed, the Bidder will have agreed to meet the stated deadline.

INSPECTION AND ACCEPTANCE AT DESTINATION:

1. Final inspection and acceptance shall be at destination. Acceptance will occur after the goods or results of the services have been inspected and when determined by designated competent staff to have met the bid specifications. Delivery does not constitute acceptance.
2. Although source inspection by the Contracting Entity is not anticipated under this Pricing Agreement/Contract, the provisions of this article shall in no way be construed to limit the rights of the Contracting Entity to otherwise conduct source inspections when it deems to be appropriate.

F.O.B. DESTINATION:

1. The Bidder shall deliver each item F.O.B. Destination, Oklahoma City, Oklahoma, and to any and all points designated in the bid specifications.
2. Inside delivery is required unless specifically and expressly stated in the bid specifications.

COMMERCIAL PACKAGING: Preservation, packaging, packing, and marking will be in accordance with Bidder's best commercial practice to provide adequate protection against shipping damage. Bidder is required to replace any goods damaged in shipping or delivery.

ESTIMATED ANNUAL REQUIREMENTS (NO GUARANTEE):

1. The quantity of any item, good, or service when shown in the price schedule as an estimate of an annual requirement is merely an estimate based on currently available information. The purchase of any such item or quantity of good or service is not guaranteed. Any offer conditioned upon a promise by the Contracting Entity to purchase a minimum or definite quantity of such an item will be rejected.
2. The Bidder agrees to furnish all quantities ordered by the Contracting Entity during the Pricing Agreement/Contract period.
3. The Contracting Entity agrees to place orders with the Bidder for all its requirements for those items shown in the price schedule, as awarded, except as follows:

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- a. Quantities of items needed under conditions of emergency or public exigency as approved by the Purchasing Agent.
 - b. Quantities of items obtainable from State contracts, as approved by the Purchasing Agent.
 - c. Quantities of items where federal funds are involved, and other action is warranted for federal regulatory compliance purposes.
 - d. Quantities of items awarded under specific and separate pricing agreements/contracts.
 - e. Quantities of items which otherwise are determined to be outside the general scope and intent of this Pricing Agreement/Contract.
4. If requirements for any awarded items do not materialize for the quantity estimated in the applicable price schedule, such failure shall not constitute grounds for equitable adjustment or additional compensation.
 5. There is no obligation to purchase any items from this Pricing Agreement/Contract, and purchases made in future fiscal years or other contract periods are subject to future appropriations and availability of funds.
 6. The Contracting Entity may request Bidder provide quantity discounts when making larger purchases. Quantity discounts will be requested from all Bidders when multiple Pricing Agreements/Contracts are awarded.

ORDER OF PRECEDENCE: In the event of an inconsistency between provisions of this Pricing Agreement/Contract, the inconsistency shall be resolved by giving precedence in the following order: (i) Pricing Agreement/Contract articles, (ii) Bid Specifications, (iii) Notice to Bidders, (iv) General Instructions and Requirements for Bidders, (v) other requirements provided by the Contracting Entity in the bid packet, then (vi) attachments, notes, and exceptions by Bidder.

PAYMENT METHODS: The ordering departments will utilize purchase order numbers or purchasing cards for ordering the goods and services they require as the need arises during the Pricing Agreement/Contract period.

The Contracting Entity shall not be held liable for any damages sustained by any Bidder for delivery of goods or services awarded by Pricing Agreement/Contract unless accompanied by an authorized purchase order or purchasing card reference name and number. Delivery of goods or services to any department of Contracting Entity without a purchase order document, purchase order number or purchasing card reference name and number given at the time the order is placed shall constitute an unauthorized purchase.

PAYMENT/INVOICE:

1. Payments will be processed promptly after completion of delivery of ordered items and after receipt of properly prepared invoices.
2. **FOR ORDERS PLACED BY PURCHASE ORDER:** The original invoice must be mailed directly to The City of Oklahoma City, Accounts Payable, 100 N. Walker Avenue, Suite 200, Oklahoma City, Oklahoma 73102, or invoices may be e-mailed to accountspayable@okc.gov. If invoices are e-mailed, a paper copy should not be mailed.

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This information is printed on the front of each purchase order. Copies of invoices may be sent to other addresses upon request. However, if the original invoice is sent to any other address, payment will be delayed, or may not be processed at all. Should another trust or government entity be using this contract they may request a different invoice address.

FOR ORDERS PLACED BY PURCHASING CARD: Do not send invoices, statements etc. to Accounts Payable for purchasing card orders. Please send all purchasing card documents directly to the cardholder. Cardholders are required to submit itemized transaction details such as invoice/delivery tickets with their monthly purchasing card statement. This is a vital part of the monthly reconciliation process. Your cooperation is appreciated. Contracting Entity employees are required, when possible, to use a purchasing card for purchases under the amount of \$5,000 for a single transaction. For single transactions over \$5,000, the bidder may request payment be completed by issuance of a purchase order. Processing fees may not be added when a purchasing card is used. The bid price is expected to cover any fees a bidder may incur.

3. Invoices must contain the following information:
 - a. Bidder's name and address
 - b. Ship to address (department name)
 - c. Purchase order number - **MUST BE INDICATED ON THE INVOICE**
 - d. Itemization of each item purchased to include:
 - i. description/stock number
 - ii. unit price
 - iii. quantity
 - iv. unit of issue (each, box, dozen, pound, etc.)
 - v. total price
 - e. Total amount of invoice
 - f. Date of delivery
4. Invoices should not reflect any outstanding backorders.

WARRANTY:

1. The Bidder warrants that at the time of delivery, all items furnished under this Pricing Agreement/Contract will be free from defects in material or workmanship and will conform to the specifications and all other requirements of this Pricing Agreement/Contract. All Bidders will furnish with their bid one copy of their warranty applicable to the supplies or equipment to be furnished.
2. As to any item which does not conform to this warranty, the Bidder agrees that the Contracting Entity shall have the right to:
 - a. Reject and return each nonconforming item to the Bidder for correction or replacement at the Bidder's expense
 - b. Require an equitable adjustment in the Pricing Agreement/Contract price.
3. This warranty shall be in addition to any other rights of the Contracting Entity.
4. All equipment warranties shall start on the date of installation and will be for the full term of said warranty.

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GENERAL PROVISIONS: The following documents are attached or by this reference incorporated as a part of this Pricing Agreement/Contract:

- a. Bid/Pricing Agreement/Contract Form & Non-Discrimination Statement
- b. Non-Collusion Affidavit
- c. General Instructions and Requirements for Bidders
- d. Specifications
- e. Oklahoma Open Records Act and Confidential Information

SAFETY DATA SHEETS: Any Bidder supplying goods or materials to the Contracting Entity that require a Safety Data Sheet (SDS) will furnish the required sheet or a composite concentration list in one of the following manners:

- a. Submitted as part of the proposal document
- b. Submitted prior to Agreement/Contract award
- c. Submitted with the product invoice
- d. Submitted at the request of the Contracting Entity

In all instances, the Bidder shall furnish the safety data sheets with the products at delivery, and shall comply with all local, state and federal laws providing for identification of materials transported to the Contracting Entity. The appropriate proposal number, Agreement/Contract number, delivery ticket number, or invoice number shall be clearly marked on the safety data sheet or the composite concentration lists. Information regarding Safety Data Sheets can be found on-line at <https://www.osha.gov/Publications/OSHA3514.html>. Any question regarding this requirement should be directed to the following address:

Oklahoma City Risk Management Division
420 W. Main Street, Suite 630
Oklahoma City, Oklahoma 73102
(405) 297-3891

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BID SPECIFICATIONS
Other Provisions

ADDENDA: It is the Bidder’s responsibility to log into the electronic bidding system to monitor any addenda that may be issued during the process. A Bidder’s bid will not be accepted if all addenda have not been acknowledged by the Bidder through the electronic bidding system. If you are set up for electronic notifications through the electronic bidding system, you should receive a notification by e-mail when addenda are issued.

BRAND NAMES/EXAMPLES: Any brand names are used for **comparative purposes only**. Slight variations from the measurements and sizes given that do not compromise the requirements of the bid specifications will be considered.

INDEMNITY REQUIREMENTS: The Bidder assumes all risks incident to or in connection with its purpose to be conducted herein under and shall indemnify, defend and save Contracting Entity harmless from damage or injuries of whatever nature or kind to persons or property arising directly or indirectly out of the Bidder’s operations and transportation of the Contracting Entity’s equipment to and from repair site regardless of fault and arising from acts or omissions of its employees regardless of fault and shall indemnify, defend, and save harmless Contracting Entity from any penalties for violation of any law, ordinance or regulation affecting or having application to said operation.

INSURANCE REQUIREMENTS: The following insurance requirements are applicable and must be obtained prior to contract award if the bid submitted includes on-site installation, on-site maintenance services or other repair services to be performed on the Contracting Entity’s property, or if insurance coverage is otherwise requested by the Contracting Entity.

WORKERS’ COMPENSATION AND EMPLOYER’S LIABILITY INSURANCE:
The Bidder shall carry Worker's Compensation Insurance in amounts as prescribed by the laws of the State of Oklahoma.

GENERAL LIABILITY INSURANCE: The Bidder shall carry a general liability insurance policy to protect the Bidder and any the Contracting Entity as Additional Insured from claims for property damage and bodily injury including death, or other loss which may arise directly or indirectly from the activities, omissions, and operations of the Bidder under the Agreement, whether such activities, omissions, and operations be by the Bidder, its subcontractor, or by anyone employed by or acting for the benefit of the Bidder in conjunction with this Agreement. The general liability policy shall have, at a minimum, the following coverage amounts:

Property Damage Liability - Limits shall be carried in the amount of not less than twenty five thousand dollars (\$25,000) to any one person for any single claim for damage to or destruction of property arising out of a single act, accident, or occurrence.

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All Other Liability - In the amount not less than one hundred seventy-five thousand dollars (\$175,000) for claims including accidental death, personal injury, and all other claims to any one person out of a single act, accident, or occurrence.

General Aggregate Limit- In an amount not less than one million dollars (\$1,000,000) for any number of claims arising out of a single act, occurrence or accident.

AUTOMOBILE LIABILITY INSURANCE – The Bidder shall maintain automobile insurance coverage in, at a minimum, the amounts required by Oklahoma law as to the ownership, maintenance, and use of all owned, non-owned, leased or hired vehicles and equipment when said vehicles or equipment is utilized to meet the requirements of this contract.

The insurance policies required herein shall be issued by a company authorized to do business in the state of Oklahoma and acceptable to Contracting Entity. Upon request, the Contracting Entity shall be furnished with a Certificate of Insurance evidencing all of the above-referenced requirements. All policies shall be in the form of an “occurrence” insurance coverage or policy. If any insurance is written in a “claims made” form, the Bidder shall also provide tail coverage that extends a minimum of two years from the expiration of the Pricing Agreement/Contract. Unless stated otherwise above, all policies must be fully insured with any single deductible not exceeding \$25,000. Bidder or Bidder’s insurance company must provide Contracting Entity at least thirty (30) days’ prior written notice of any cancellation or material coverage change in their policies. **The Contracting Entity shall be listed as a Certificate Holder. This Pricing Agreement/Contract requires that Contracting Entity, including The City of Oklahoma City and its participating public trusts to this Contract/Agreement whether named herein or by reference only, be named as additional insured on the Bidder’s insurance policies, except Worker’s Compensation and Employer’s Liability Insurance, to the full limits of the policies and consistent with the same coverages available to the named insured. Any blanket additional insured endorsement which limits coverages to any Contracting Entity is not compliant with this Pricing Agreement/Contract and shall be considered a breach. Contracting Entity must be provided with a Certificate of Insurance or Endorsement evidencing Contracting Entity’s additional insured status prior to contract award. The policy description shall state the following: “Additional insured(s) on the listed policies are those required in the contract.”**

Unless otherwise approved by the Contracting Entity prior to contract award, self-insured retentions will not be accepted unless accompanied by a bond or irrevocable letter of credit guaranteeing payment of the losses, related investigations, claim administration, and defense expenses not otherwise covered by the Bidder’s self-insured retention.

PROJECT DOLLAR LIMITS: HVAC services projects exceeding \$100,000 are considered to be a construction project and must be in compliance with additional requirements before services are performed. These projects will require a work order from the City Engineer, or designee, along with the submittal of Contractor’s bonds for the project in accordance with the bonding requirements included in this document.

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There is no guarantee that projects exceeding \$100,000 will be purchased under this pricing agreement. These projects may be bid separately by the Public Works Department or City Trust. It is the City's intention to bid projects exceeding \$100,000 separately from this pricing agreement unless an urgent need is approved by the City Engineer and City Purchasing Agent in advance of the work order being issued.

WORKORDERS: The City Engineer, or designee, will issue a Public Works work order for any HVAC services projects exceeding \$100,000, regardless of which department is requesting the service. Contractors must have a work order and purchase order number to begin working on a project. No work orders will be issued for projects exceeding \$100,000 without receipt of the required Contractor's bonding and insurance.

BONDING REQUIRMENTS: Projects exceeding \$100,000 will require the Contractor to furnish and maintain Performance, Maintenance and Statutory bonding with good and sufficient securities acceptable to the City of Oklahoma City in connection with the performance of the work under the project prior to the work order being issued. As this is an annual contract involving future work orders, which are undefined at this time, inclusion of bonds is not required as a part of the Bid. Sample bond forms are included as an attachment and may be required for future work orders. **(Note: Bonds shall not be required for future work orders of less than \$100,000 total cost. Bonds shall be required for future work orders of \$100,000 or greater total cost.)** The cost of any required bonds shall be reimbursed by the City or Trust at the direct cost of the bonds, without profit or overhead, and shall be defined with each proposal and work order issued. The cost of the bonds shall be included in the Contractor's proposal/quote and shall be invoiced with the project with documentation of the cost of the bond attached to the invoice.

UNDUE INFLUENCE: Upon advertising this solicitation, no officer, employee, agent, or representative of the Bidder shall have any contact or discussion, verbal or written, with any representative of the Contracting Entity (i.e., Trust Officer, City Council member, City staff, etc.) either directly or indirectly through others in which the Bidder seeks to influence any representative of the Contracting Entity regarding any matters pertaining to this solicitation.

Contacts by the Bidder with the Contracting Entity that do not pertain to a solicitation are exempt from this provision. Examples of these exempt contacts are:

- Private, non-business, contacts with the Contracting Entity by the Bidder's employees acting in their personal capacity
- Business contacts outside of this solicitation that the Contracting Entity may have with the Bidder
- Presentations and/or responses to inquiries initiated by the Contracting Entity
- Pre-bid or pre-proposal conferences
- Discussions with The City Procurement Agent, buyer or departmental contact as outlined in the bid packet

If a representative of any Bidder submitting a bid violates the foregoing prohibition by contacting any of these parties, such contact may result in the Bidder being disqualified from the procurement process.

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ESCALATION/DE-ESCALATION: Bidder may request a price increase or decrease if the Bidder shows satisfactory proof to the Contracting Entity that a price change is justified and beyond the scope of the Bidder's control. It is understood that any percentage or discount offered to the Contracting Entity will remain firm for the duration of the Pricing Agreement/Contract. However, within 10 days of any approved changes in the price list(s) bid, Bidder may furnish the Procurement Services Division three copies of the new price list(s). New price list(s) will be considered effective the date shown on the price list(s), or 10 days from the date price list(s) are received in the Procurement Services Division, whichever is later. The three copies of the changed price list/catalog may be mailed, e-mailed or hand delivered to:

The City of Oklahoma City
Procurement Services Division
Attn: Monica Hardesty, Senior Buyer
100 North Walker, 2nd Floor
Oklahoma City, OK 73102
Monica.Hardesty@okc.gov

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BID SPECIFICATIONS

Technical Provisions

INTENT: To obtain pricing agreements for labor and materials to repair and/or install various air conditioning, heating and chiller units for various City departments and Trusts.

- I. Chiller Repair, Replacement, or Installation:** Contractor will furnish labor and materials to repair or install various air conditioning chiller units located in City or Trust owned buildings.
- a. All services accomplished under this pricing agreement shall be performed only by properly trained, qualified, and licensed persons directly employed by the Contractor. Contractors shall provide a list of all manufacturer's brands for air conditioning, heating and chiller units they carry a factory certification on. Contractors must be prepared to provide certification upon request by the City.
 - b. All parts, lubricants, refrigerants, and repairs shall be as manufactured by or recommended by the manufacturer of the unit to be repaired. All materials and parts shall be new, high quality, and designed for the purpose intended. All materials and parts shall be OEM, or if OEM parts are not available, they should be the type that is recommended by the manufacturer of the equipment. Used, factory seconds or other less than new, first quality materials or parts will not be acceptable.
 - c. All repairs shall be made in a neat and workmanlike manner and shall result in a safe, secure job meeting all codes under which the units fall. All repairs shall be completed according to the manufacturers' specifications or recommendations.
 - d. All extraneous parts and materials shall be removed from the worksite upon completion of repairs as well as all oil or other lubricants cleaned from the floors and machinery.
 - e. The successful bidder shall provide good and timely service on a twenty-four (24) hour basis, three hundred sixty-five (365) days a year. Response to a site for service shall not exceed four (4) hours and response time shall begin at the time of notification to the bidder.

It is the Contractor's responsibility to notify the City of any additional problems found during the repair/replacement of the equipment. It is also the Contractor's responsibility to notify the City if additional time is needed for diagnosis of problems with the equipment or system.

- II. Bidder Qualifications:** The bidder shall have been successfully engaged in the business of repair and maintenance of air conditioning chiller units, 250 ton or larger, in the Oklahoma City area for a period of not less than five years. Bidder shall also:
- a. Show evidence of having satisfactorily serviced, maintained, and repaired units of 250 tons or larger by providing a list of five (5) jobs wherein teardown and rebuilding of these units was accomplished within the past three years including persons to contact. A form has been provided in the electronic bidding system to submit reference information.
 - b. Provide written evidence of having access to factory parts on a 24-hour basis. A form has been provided in the electronic bidding system to submit this information.

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- c. Provide evidence of manufacturer's certified factory training of the technicians to be performing the work. This information can be attached in the line item area of the electronic bidding system.
- d. Provide evidence of having in their possession manufacturers' "teardown" manuals for the specific machines to be covered. This information can be attached in the line item area of the electronic bidding system.

III. Materials and Workmanship: Contractor shall be highly qualified and trained to work with the particular model units for which coverage is sought.

- a. All services accomplished under this pricing agreement shall be performed only by properly trained, qualified, and licensed persons directly employed by the Contractor. Factory certified training is required for the specific portion of the contract.
- b. All parts, lubricants, refrigerants, and repairs shall be manufactured by or recommended by the manufacturer of the unit to be repaired. All materials and parts shall be new, high quality, and designed for the purpose intended. Used, factory seconds or other less than new, first quality materials or parts will not be acceptable. OEM or factory recommended parts are required for the specific portion of the contract.
- c. All repairs shall be made in a neat and workmanlike manner and shall result in a safe, secure job meeting all codes under which the units fall.
- d. All extraneous parts and materials shall be removed from the worksite upon completion of repairs as well as oil or other lubricants cleaned from the floor and machinery.
- e. The successful bidder shall provide good and timely service on a twenty-four (24) hour basis, three hundred sixty-five (365) days a year. Response to a site for service shall not exceed four (4) hours and response time shall begin at the time or notification to the bidder.

IV. Air Conditioning and Heating Services: Contractor shall provide air conditioning and heating services on various makes of air conditioners and heating units of various sizes.

- a. All services accomplished under this pricing agreement shall be performed only by properly trained, qualified, and licensed persons directly employed by the Contractor.
- b. All parts, lubricants, refrigerants, and repairs shall be as manufactured by or recommended by the manufacturer of the unit to be repaired. All materials and parts shall be new, high quality, and designed for the purpose intended. Used factory seconds or other less than new, first quality materials or parts will not be acceptable.
- c. All repairs shall be made in a neat and workmanship manner and shall result in a safe, secure job meeting all codes under which the units fall.
- d. All extraneous parts and materials shall be removed from the work site upon completion of repairs as well as all oil or other lubricants cleaned from the floor and machinery.

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- e. The successful bidder shall provide good and timely service on a twenty-four (24) hour basis, three hundred sixty-five (365) days a year. Response to a site for service shall not exceed four (4) hours and response time shall begin at the time of notification to the bidder.
- f. It is the Contractor's responsibility to notify the City of any additional problems found during the repair/replacement of the equipment. It is also the Contractor's responsibility to notify the City if additional time is needed for the diagnosis of problems with the equipment or system.

V. **Air Conditioning/Heating Units and Equipment Installation Services:** It is the intent of these specifications to obtain air conditioning, and heating installation services. The City of Oklahoma City may require the installation of new air conditioning, heating units, and equipment.

- a. To this extent, the Contractor shall comply with all federal, state and local regulations/codes for the proper installation of air conditioning/heating units, and equipment.
- b. All services provided under this pricing agreement shall be performed only by properly trained, qualified, and licensed persons directly employed by the Contractor.
- c. All parts, lubricants, refrigerants, and repairs shall be manufactured by or recommended by the manufacturer of the unit to be repaired. All materials and parts shall be new, high quality, and designed for the purpose intended. Used factory seconds or other less than new, first quality materials or parts will not be acceptable.
- d. All extraneous parts and materials shall be removed from the worksite upon completion of repairs as well as all oil or other lubricants cleaned from the floor and machinery.
- e. Before any new installation of Air Conditioning or Heating Unit, equipment can be purchased; the respective Department must have final approval of their design and equipment from the General Services Department/Building Management Division.
- f. Successful vendors shall not begin installation of any air conditioning and/or heating units to be installed on any building and/or installations on any City or Trust owned property without first determining that the above paragraph e. has been complied with.
- g. The City or Trusts shall not be held liable for damages incurred whereby prior approval for the installation of new air conditioning/heating unit equipment, has not been first obtained from the General Services Department/Building Management Division.
- h. It is the Contractor's responsibility to notify the City of any additional problems found during the repair/replacement of the equipment. It is also the Contractor's responsibility to notify the City if additional time is needed for diagnosis of problems with the equipment or system.

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VI. Vendor Compliance: Contractor shall comply with EPA, OSHA, and other government regulations set forth in the Clean Air Act, along with the following:

- a. Contractor will not, under any circumstances, intentionally vent refrigerant.
- b. Contractor will adhere to the SSD Refrigerant Policy dated 5/29/92.
- c. Contractor will adhere 1989 and ASHRAE Guideline 3-1990.
- d. Contractor will provide their employees with the required education and certification to perform their duties under these regulations.
- e. Contractor will provide their employees with proper equipment and safety apparatus to perform their duties under these regulations.

VII. Permits/Licenses: The Contractor must, at his own cost, secure all permits and licenses and pay all fees required by City of Oklahoma City Ordinance or State Statute and give all notices necessary and incidental to the lawful prosecution of the Work.

VIII. Equipment Rental:

If rental equipment is used to perform contracted work for the City of Oklahoma City, the contracted vendor will submit the cost of the rental equipment without markup to the City for reimbursement. A copy of the rental invoice must be included when the invoice is submitted for payment.

The City of Oklahoma City reserves the right to verify costs that are invoiced at a cost plus percentage markup by obtaining documentation from the Contractor.

Technical questions are to be addressed through the electronic bidding system and the Buyer will respond electronically and issue addenda, if necessary.

Pricing must be submitted through the Line Item area of the electronic bidding system.

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PERFORMANCE BOND

Project _____

KNOW ALL MEN BY THESE PRESENTS:

That we _____, as Contractor, and _____, as Surety, are severally and jointly held and firmly bound unto _____, referred to in the Bidding Documents and herein as "Awarding Public Agency" in the sum of _____ (\$ _____), such sum being equal to 100% of the Contract price, for the payment of sum amount, we, and each of us, bind ourselves, our heirs, executors and assigns, themselves, and its successors and assigns, jointly and severally, firmly to the terms of this Bond by these presents.

WITNESSETH:

WHEREAS, the Awarding Public Agency has caused to be prepared certain Bidding Documents; has caused Notice to Bidders; and has received bids for the above Project; and,

WHEREAS, Contractor, in response to said Notice to Bidders, has submitted to Awarding Public Agency a bid; in accordance with the Bidding Documents; and

WHEREAS, the Awarding Public Agency has determined Contractor to be the lowest responsible bidder and has awarded, as stated by the Awarding Public Agency, this Contract for this Project, which Contract is hereby made a part and parcel of this Bond as if literally written herein.

NOW, THEREFORE, if the Contractor shall fully and faithfully execute the work and perform said contract according to its terms, conditions, and covenants, and in exact accordance with the Bidding Documents and the Contract Documents, and according to certain plans and specifications heretofore made, adopted, and placed on file in the Office of the City Clerk of The City of Oklahoma City, and shall promptly pay or cause to be paid, all labor, material, equipment and/or repairs and all labor performed on said work, whether by subcontract or otherwise, and shall protect and save harmless the Awarding Public Agency and The City of Oklahoma City and all interested property owners against all claims, demands, causes of action, losses or damage, and expense to life or property suffered or sustained by any person, firm, or corporation by

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reason of negligence of the Contractor or his or its agents, servants, or employees in the construction or provision of said work, or by or in consequence of any improper execution of the work or act of omission or use of inferior materials by said Contractor, or his or its agents, servants, or employees and shall protect the Awarding Public Agency and The City of Oklahoma City harmless from all suits and claims of infringement or alleged infringement of patent rights or processes, then this obligation shall be void; otherwise, this obligation shall remain in full force and effect.

IT IS FURTHER EXPRESSLY AGREED AND UNDERSTOOD by the parties hereto that no changes or alterations in said Contract and no deviations from the plan or mode of procedure herein fixed shall have the effect of releasing the sureties, or any of them, from the obligations of this Bond.

IN WITNESS WHEREOF, the said Contractor has caused these presents to be executed in its name by its duly authorized officer, agent or representative; and the said Surety has caused these presents by its attorney-in-fact duly authorized so to do.

ATTEST:

Contractor:

(Secretary-Witness) By: _____

As: _____

ATTEST:

Surety:

(Secretary-Witness) By: _____
As: Attorney-in-Fact

REVIEWED for form and legality.

Assistant Municipal Counselor

APPROVED by Awarding Public Agency this ____ day of _____, 20____.

ATTEST:

AWARDING PUBLIC AGENCY

City Clerk / Secretary

MAYOR / CHAIRMAN

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STATUTORY BOND

Project _____

KNOW ALL MEN BY THESE PRESENTS:

That we _____, as Contractor, and _____, as Surety, are severally and jointly held and firmly bound unto the State of Oklahoma and the subcontractors, suppliers, and materialmen of the Contractor in the sum of _____ (\$ _____), such sum being equal to 100% of the Contract price, for the payment of sum amount, we, and each of us, bind ourselves, our heirs, executors and assigns, themselves, and its successors and assigns, jointly and severally, firmly to the terms of this Bond by these presents.

WITNESSETH:

WHEREAS, the Awarding Public Agency has caused to be prepared certain Bidding Documents; has caused Notice to Bidders; and has received bids for the above Project; and,

WHEREAS, Contractor, in response to said Notice to Bidders, has submitted to Awarding Public Agency a bid; in accordance with the Bidding Documents; and

WHEREAS, the Awarding Public Agency has determined Contractor to be the lowest responsible bidder and has awarded, as stated by the Awarding Public Agency, this Contract for this Project, which Contract is hereby made a part and parcel of this Bond as if literally written herein.

NOW, THEREFORE, if said Contractor shall fail or neglect to pay all indebtedness incurred by said Contractor to its subcontractors, suppliers and materialmen who perform work or provided labor, materials, machinery, supplies and equipment in the performance of the Contract, within thirty (30) calendar days after the same becomes due and payable, the person, entity or corporation entitled thereto may sue and recover on this Bond, the amount so due and unpaid up to the amount of this Bond. Upon payments of all indebtedness due said subcontractors, suppliers and materialmen on this Project, this Bond shall become fully satisfied.

IT IS FURTHER EXPRESSLY AGREED AND UNDERSTOOD by the parties hereto that no changes or alterations in said Contract and no deviations from the Bidding Documents and the Contract shall have the effect of releasing the sureties, or any of them, from

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the obligations of this Bond.

IN WITNESS WHEREOF, the said Contractor has caused these presents to be executed in its name by its duly authorized officer, agent or representative; and the said Surety has caused these presents to be executed by its attorney-in-fact duly authorized so to do.

ATTEST:

Contractor:

(Secretary-Witness) By: _____

As: _____

ATTEST:

Surety:

(Secretary-Witness) By: _____
As: Attorney-in-Fact

REVIEWED for form and legality.

Assistant Municipal Counselor

APPROVED by Awarding Public Agency this _____ day of _____, 20 ____.

ATTEST:

AWARDING PUBLIC AGENCY

City Clerk / Secretary

MAYOR / CHAIRMAN

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MAINTENANCE BOND

Project _____

KNOW ALL MEN BY THESE PRESENTS:

That we _____, as Contractor, and _____, as Surety, are severally and jointly held and firmly bound unto _____, referred to in the Bidding Documents and herein as "Awarding Public Agency" in the sum of _____ (\$ _____), such sum being equal to 100% of the Contract price, for the payment of sum amount, we, and each of us, bind ourselves, our heirs, executors and assigns, themselves, and its successors and assigns, jointly and severally, firmly to the terms of this Bond by these presents.

WITNESSETH:

WHEREAS, the Awarding Public Agency has caused to be prepared certain Bidding Documents; has caused Notice to Bidders; and has received bids for the above Project; and,

WHEREAS, Contractor, in response to said Notice to Bidders, has submitted to Awarding Public Agency a bid; in accordance with the Bidding Documents; and

WHEREAS, the Awarding Public Agency has determined Contractor to be the lowest responsible bidder and has awarded, as stated by the Awarding Public Agency, this Contract for this Project, which Contract is hereby made a part and parcel of this Bond as if literally written herein.

NOW, THEREFORE, if said Contractor shall pay or cause to be paid to the Awarding Public Agency all damage, loss, and expense which may result by reason of failed or defective materials and/or workmanship in connection with said work occurring within a period of _____ (____) year(s) from and after acceptance of said Project and work by the Awarding Public Agency, then this obligation shall be null and void, otherwise to be and remain in full force and effect.

It is further agreed that if the said Contractor or Surety herein shall fail to maintain said Project and work against any failure due to defective workmanship and/or material for a period of _____ (____) year(s) and at any time repairs shall be necessary that the cost of making said repairs shall be determined by the Awarding Public Agency or its designees to

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ascertain the same, and if, upon thirty (30) days of notice, the said amount ascertained shall not be paid by the Contractor or Surety herein, or if the necessary repairs are not made, the said amount shall become due upon the expiration of thirty (30) days and suit may be maintained to recover the amount so determined in any Court of competent jurisdiction. And that the amount so determined shall be conclusive upon the parties as to the amount due on this Bond for the repair or repairs included therein, and that the cost of all repairs shall be so determined from time to time during the life of this Bond as the condition of the improvements may require.

It is further expressly agreed and understood by the parties hereto that no changes or alterations in said Contract and no deviations from the plan or mode of procedure herein fixed shall have the effect of releasing the Surety or the Contractor, or either of them, from the obligations of this Bond.

IN WITNESS WHEREOF, the said Contractor has caused these presents to be executed in its name by its duly authorized officer, agent or representative; and the said Surety has caused these presents by its attorney-in-fact duly authorized so to do.

ATTEST:

Contractor:

(Secretary-Witness) By: _____

As: _____

ATTEST:

Surety:

(Secretary-Witness) By: _____
As: Attorney-in-Fact

REVIEWED for form and legality.

Assistant Municipal Counselor

APPROVED by Awarding Public Agency this ____ day of _____,
20 ____.

ATTEST:

AWARDING PUBLIC AGENCY

City Clerk / Secretary

MAYOR / CHAIRMAN

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DEFECT BOND

Project _____

KNOW ALL MEN BY THESE PRESENTS:

That we _____, as Contractor, and _____, as Surety, are severally and jointly held and firmly bound unto _____, referred to in the Bidding Documents and herein as "Awarding Public Agency" in the sum of _____ (\$ _____), such sum being equal to 100% of the Contract price, for the payment of sum amount, we, and each of us, bind ourselves, our heirs, executors and assigns, themselves, and its successors and assigns, jointly and severally, firmly to the terms of this Bond by these presents.

WITNESSETH:

WHEREAS, the Awarding Public Agency has caused to be prepared certain Bidding Documents; has caused Notice to Bidders; and has received bids for the above Project; and,

WHEREAS, Contractor, in response to said Notice to Bidders, has submitted to Awarding Public Agency a bid; in accordance with the Bidding Documents; and

WHEREAS, the Awarding Public Agency has determined Contractor to be the lowest responsible bidder and has awarded, as stated by the Awarding Public Agency, this Contract for this Project, which Contract is hereby made a part and parcel of this Bond as if literally written herein.

NOW, THEREFORE, should the Contractor, during the term of this Defect Bond, timely and expeditiously repair or replace, or cause to be repaired or replaced, any defective, inferior or non-compliant workmanship, work and material regarding or relating to the Project, and should the Surety, at the end of the term of this Defect Bond, pay, or cause to be paid, to the Awarding Public Agency all damages, losses, costs and expenses which directly or indirectly may result from: (1) the untimely repair or replacement of inferior, non-compliant or defective materials, work and workmanship in connection with said Project; (2) the failure to timely and expeditiously maintain, repair or replace same; and (3) the cost and expense incurred by the Awarding Public Agency of any defective, inferior or non-compliant work, material or workmanship repaired, replaced or maintained, timely and expeditiously, by staff and/or third parties, then this Defect Bond shall terminate at the end of the term provided in the Bidding

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Documents; otherwise, this Defect Bond shall remain in effect.

The term of this Defect Bond shall commence upon the formal final acceptance of the entire Project by the Awarding Public Agency as fully and totally complete and shall run for (1) the total number of years as provided in the Bidding Documents for this Project ("term of years"); or (2) until all repairs and replacement of defective, inferior or non-compliant materials, work or workmanship, occurring or discovered prior to the termination of this Defect Bond have been completed and all sums due from the Surety and the Contractor therefore have been paid, whichever is later.

IN WITNESS WHEREOF, the said Contractor has caused these presents to be executed in its name by its duly authorized officer, agent or representative; and the said Surety has caused these presents by its attorney-in-fact duly authorized so to do.

ATTEST:

Contractor:

(Secretary-Witness)

By: _____

As: _____

ATTEST:

Surety:

(Secretary-Witness)

By: _____

As: Attorney-in-Fact

REVIEWED for form and legality.

Assistant Municipal Counselor

APPROVED by Awarding Public Agency this ____ day of _____, 20____.

ATTEST:

AWARDING PUBLIC AGENCY

City Clerk / Secretary

MAYOR / CHAIRMAN

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Contractor Questionnaire

Show evidence of having satisfactorily serviced, maintained, and repaired units of 250 tons or larger by providing a list of five (5) jobs wherein teardown and rebuilding of these units was accomplished within the past three years including persons to contact.

Company Name:
Name of Contact:
Phone Number:
Description of Service Provided:
Dates of Service:

Company Name:
Name of Contact:
Phone Number:
Description of Service Provided:
Dates of Service:

Company Name:
Name of Contact:
Phone Number:
Description of Service Provided:
Dates of Service:

Company Name:
Name of Contact:
Phone Number:
Description of Service Provided:
Dates of Service:

Company Name:
Name of Contact:
Phone Number:
Description of Service Provided:
Dates of Service:

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Provide written evidence of having access to factory parts on a 24-hour basis.

List any exceptions to Section I of the bid specifications – Chiller Repair, Replacement, or Installation:

List any exceptions to Section II of the bid specifications - Bidder Qualifications:

List any exceptions to Section III of the bid specification - Materials and Workmanship :

List any exceptions to Section IV of the bid specifications –Air Conditioning and Heating Services:

List any exceptions to Section V of the bid specifications –Air Conditioning/Heating Units and Equipment
Installation Services:

List any exceptions to Section VI of the bid specifications –Contractor shall comply with EPA, OSHA, and
other government regulations set forth in the Clean Air Act:

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(Internal use only)	
PeopleSoft Vendor ID: _____	Entered by: ____
Helpdesk Ticket #: _____	Date: _____

The Bidder's Name that is entered on the Bid/Pricing Agreement/Contract Form & Non-Discrimination Form should match the Business Name on the Vendor Registration Form

VENDOR REGISTRATION FORM

If you are a single member LLC classified as a Disregarded Entity on your W-9, you MUST provide the owner's SSN or EIN, not the LLC's EIN (see IRS pub 3402).

Select One:

- NEW DOMESTIC VENDOR** - Attach the most current IRS W-9 form, along with this form; both MUST be filled out in their entirety.
- NEW FOREIGN ENTITY** - Attach the most current, appropriate, IRS W-8 form, along with this form; both MUST be filled out in their entirety.
- UPDATE EXISTING VENDOR** - Attach the most current IRS W-9/W-8 form, along with this form; both MUST be filled out in their entirety.

SDBE Program: Please select all applicable vendor characteristics:

- Disadvantaged Business Enterprise DUNS Number (if any)
- Small Business - as defined by the U.S. Small Business Administration
- Women-Owned Business - % Women-Owned / Controlled %
- Minority-Owned Business - % Minority-Owned / Controlled % Ethnicity(ies)

If you checked any of the above boxes, please provide a brief description of your business:

If you checked any of the above boxes, do you wish to receive notifications of upcoming contract opportunities?

Mailing Addresses:

PURCHASE ORDERS

BUSINESS NAME

ADDRESS 1

PAYMENT REMITTANCE

BUSINESS NAME

ADDRESS 1

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ADDRESS 2

CITY

STATE

ZIP CODE

CONTACT PERSON

EMAIL ADDRESS

TELEPHONE NUMBER

ADDRESS 2

CITY

STATE

ZIP CODE

CONTACT PERSON

EMAIL ADDRESS

TELEPHONE NUMBER

Do you wish to receive payments by electronic funds transfer?

Any vendor who accepts payment confirms the following: the invoice is true and correct; the work, service or materials as shown by the invoice or claim have been completed or supplied in accordance with the plans, specifications, orders or requests furnished the vendor; and the vendor has made no payment, directly or indirectly, to any elected official, officer or employee of this City, of money or any other thing of value to obtain payment See 62 O.S. § 310.9.

I certify that the information supplied herein is correct and that neither the applicant nor any person (or concern) in any connection with the applicant as a principal or officer is now debarred or otherwise declared ineligible by a public agency for bidding or furnishing materials, supplies or services, to any other public agency thereof. NOTE: Article IV, Section 11 of the City Charter prohibits employees of the City from having a proprietary interest in City Contracts. See 11 O.S. §8-113.

TYPE NAME OF PERSON AUTHORIZED TO SIGN

TITLE

BIDDER MUST ELECTRONICALLY COMPLETE AND SIGN THIS DOCUMENT PRIOR TO SUBMITTING INTO THE ELECTRONIC BID SYSTEM

Please be aware that typing in your password acts as your electronic signature, which is just as legal and binding as an original signature.

(See Electronic Signatures in Global and National Commerce Act for more information.)

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CONTRACTOR/VENDOR BACKGROUND CHECKS FOR ACCESS TO OR WORK IN CITY AND TRUST BUILDINGS AND STRUCTURES

The City has established a policy to better secure City and/or Trust owned or operated buildings and structures by requiring background and fingerprint checks of Non-City employees as a condition precedent to entering City and/or Trust buildings and structures. **Contractor/vendor employees and agents who will be required to enter City and Trust buildings and structures to perform a City or Trust Contract will be required to obtain and provide an Oklahoma State Bureau of Investigation background and fingerprint check to the General Service Director or designee before such Contractor/Vendor employee or agent will be permitted to enter City and/or Trust buildings and structures unescorted, at their cost.**

The General Services Director will establish and maintain a list of Non-City employees authorized to enter City and/or Trust buildings and structures. Background and fingerprint records will be maintained by the General Services Department in a secure location within the City's internal network. Said records will be destroyed within sixty days of: 1) final acceptance by the City Council in the case of construction projects, 2) termination or expiration of a procurement pricing agreement, 3) termination or expiration of an engineering, architectural or planner agreement, or 4) termination or expiration of a professional services agreement, unless the Contractor/Vendor has another contractor or agreement. The City reserves the right and authorizes the General Services Director or designee to request and require any such background check be updated and resubmitted. In addition, the Contractor/Vendor acknowledges and agrees that Contractor/Vendor employees and agents will be asked to verify their identity with a government issued picture identification (Driver's License, Passport, Oklahoma issued Identification Card) from the employee or agent's state of residence to enter City and/or Trust owned or operated buildings and structures.

Arrest and/or conviction records may disqualify Contractor/Vendor employees or agents from access or for work in City or Trust buildings and structures.

In addition to the Sex Offenders Registration Act (57 O.S. Section 581 *et seq.*) and the Mary Rippy Violent Crime Offenders Registration Act (57 O.S. Section 591 *et seq.*), the following criteria will be used when reviewing Contractor/Vendor employee or agent requests for building access:

- (a) Any unpardoned felony conviction or plea of nolo contendere may be disqualifying, depending on the nature of the conviction and the relation to the scope of the contract or price agreement, except under the following circumstances:
1. Access to City or Trust buildings and structures is contingent upon successful completion of two (2) years of a deferred or suspended sentence (if the sentence exceeds two (2) years), otherwise, after successfully serving the complete sentence. Applicants must submit two (2) favorable written references, one (1) of which must be from an employer with whom the individual has worked within the last two years. Situations where the applicant is unable to provide a written reference from an employer with whom the individual has worked within the last two (2) years will be reviewed by the General Services Director or designee on a case-by-case basis.
 2. Applicants convicted of a felony and ordered to serve time with the Department of Corrections may be eligible for access, depending on the nature of the conviction and the position sought, two (2) years from the date of parole. Applicants must submit two (2) favorable written references, one (1) of which must be from an employer with whom he or she has worked within the last two (2) years will be reviewed by the General Services Director or designee on a case-by-case basis.

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- (b) Any unpardoned conviction(s) involving the following offenses may be disqualifying: moral turpitude; non-consensual sex acts; distribution or trafficking of controlled dangerous substances; assault and battery with a dangerous weapon, or any offense involving a minor as a victim.
- (c) Any applicant who has been convicted of a felony, is a current defendant of a Victim Protection Order (VPO) or has been convicted of a misdemeanor crime of Domestic Violence, will not be considered for facility access. Misdemeanor convictions and traffic violations will be evaluated on an individual basis and may be disqualifying.
- (d) Any applicant with a pending felony or misdemeanor charge (other than minor traffic violations) will be ineligible for access, until a final disposition of the charge is made.
- (e) Any conviction that has been pardoned or expunged cannot be considered in a facility access decision.

If it is determined that information obtained through the applicant's OSBI criminal records check makes the applicant unsuitable for access to City or Trust buildings or structures, the General Services Department will notify the applicant immediately and provide a copy of any criminal record information.

- (a) The applicant will be given seven (7) business days to provide information that negates the validity and relevance of the criminal record. If the information obtained through the criminal records check cannot be invalidated by the applicant, the applicant will be denied facility access.
- (b) In determining an applicant's suitability for facility access, the General Services Department will consider information including, but not limited to the following:
 - 1. Relevance of the crime to the proposed work to be performed.
 - 2. Nature of the work to be performed;
 - 3. Recency of the conviction;
 - 4. Sensitivity of and potential risk to accessible information, systems, or equipment; and
 - 5. Potential risk or threat to City employees.

Upon approval of a contract or agreement by the City Council/Trust, the successful Contractor(s)/Vendor(s) will be required to submit to the General Services Department the following completed documents for **each** employee requiring access to City or Trust buildings and structures to fulfill the terms of the contract or agreement.

- 1. Non-Employee Building Access Request Form – available upon request at (405) 297-2123
- 2. OSBI Criminal History Information Request Portal Response – available at <http://www.ok.gov/osbi/CriminalHistory/CHIRP>

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Question and Answers for Bid #24613 - AIR CONDITIONING, HEATING, AND CHILLER INSTALLATION, REPAIR & REPLACEMENT SERVI

Overall Bid Questions

There are no questions associated with this bid.

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