

Request for Proposals

for

Comprehensive Preventative Maintenance Services

Mechanical Systems

at

Date

1. SCOPE

A. Predictive maintenance services shall be provided by the Service Company on all equipment and associated devices related to the Heating, Ventilating & Air Conditioning systems as outlined within the specification.

B. The Service Company shall furnish all personnel, parts, materials, test equipment, tools and services in conformance with the terms and conditions as outlined below.

C. As part of this proposal, the Service Company shall submit for evaluation a comprehensive and detailed technical and business prospectus, descriptively outlining the ability to adequately and satisfactorily perform the services as requested in this specification.

D. It is the intention of this specification to establish and define those services that are to be performed and, in addition, to determine the capability, availability, and local experience of the Service Company desiring to provide such services.

E. Award of the contract shall be evaluated on a variety of factors, in addition to cost, such as technical competence, references, past experience, financial ability, and other factors requisite to adequate and satisfactory performance of the services drafted.

F. All Service Companies desiring to provide services specified shall visit the jobsite to become familiar with the facility and equipment prior to submitting a proposal. No proposal shall be accepted from any Service Company unless it has been verified that there has been a visit and inspection prior to submittal. The Service Company shall not be relieved from assuming all responsibility for properly estimating the difficulties and the cost of performing the services required with this specification, because of failure to investigate the conditions or become acquainted with all the information concerning the services to be performed.

2. SERVICE COMPANY QUALIFICATIONS

The following requirements shall be considered as the minimum standards for Service Company to be considered as qualified to provide services under this contract and shall be a pre-requisite to any award.

- A period of TEN (10) years experience in the performance of H.V.A.C. maintenance as specified in the local geographic area shall be considered a minimum.
- The Service Company shall maintain a field office and/or warehouse that are within one hundred (100) kms of the facility to be serviced under this specification.
- Service technicians employed by the Service Company shall reside in an area within a maximum of one hundred (100) kms radius of the

facility to be serviced.

- Services that are to be provided shall be performed by qualified and trained service personnel that are directly employed by the Service Company. Sub-contracting portions of the system or services requested in this specification shall not be allowed without prior consent.
- The Service Company shall provide a minimum of eight references, within one hundred kms of the owner's facility, for which guaranteed services are presently being provided as outlined within this specification.
- The Service Company shall submit with his bid data that indicates the use of a uniform and detailed method by which Predictive maintenance tasks are defined, scheduled, recorded, updated and processed. The Service Company's Predictive maintenance program shall be computer generated, based on run time, manufacturer's recommendations and a historical data bank of similar equipment. Simple computer based runtime only, or hand scheduled programs, are not acceptable. Furthermore the contractor must provide service reports, invoicing, and recommendations based on need and availability.

3. EQUIPMENT -- MAINTENANCE SERVICE

A. Equipment Included

1. The specific quantities, sizes and model numbers of the major pieces of equipment shall be listed separately on the EQUIPMENT LIST attached.
2. The Predictive maintenance and the responsibility of the Service Company shall not be limited only to these major pieces of equipment as shown on the EQUIPMENT LIST, but shall also include all appurtenant devices and systems as listed below that are related to the heating, ventilating and air conditioning system.

a. Heating System

Burners, furnaces, pumps, heating coils, water strainers, duct heaters, humidifiers etc.

b. Cooling System

Air Conditioning compressors, evaporative condensers, air cooled condensers, pumps, cooling coils, etc.

c. Air Handling System

Fans, motors, air grills, plenums, registers, air filters, dampers, induction units, mixing boxes, fan coil units, etc

d. Temperature Control System

Thermostats, pressure controls, relays, limits, valve operators, damper motors, humidity controls, step switches, time clocks, contactors, controllers, capacity controls, safety controls, recorders, control panels, gauges, air compressor (for pneumatic control systems).

e. Miscellaneous Equipment

Exhaust fans, manual valves, float valves, direct expansion valves, thermometers, gauges, magnetic starters, manual motor starters, pump and fan motor drives, belts, electrical wiring from motor starter to their respective motor, check valves, refrigerant piping and piping insulation, refrigerant.

B. Equipment Not Included

- Maintenance services, including repair labor and parts replacement, for portions of the systems and equipment that are non-maintainable or non-moving are not required nor included as part of this specification.
- Excluded items shall be considered as: foundations, structural supports, domestic water lines, drains, plumbing, oil lines, gas lines, piping, air handling duct work, unit cabinets, and refractory material, cooling water structures, etc.
- The owner assumes that the systems(s) being quoted upon are in maintainable condition. If the initial inspection or initial seasonal start-up indicates repairs are required, a firm quotation will be submitted for owner's approval. Should owner not authorize the repairs or service, Contractor may either remove the unacceptable system(s), component(s), or part(s) from its scope of responsibility and adjust the monthly rate accordingly or cancel this Agreement.
- This specification covers only that equipment as listed herein, and in the event the system is altered, changed, or if any equipment is added, or not included in this specification, then that portion shall be added or deleted as required and shall be in accordance with this specification.

C. Services Included:

- The general services listed below shall apply to the systems and equipment as shown on the EQUIPMENT LIST and as described in the section entitled "EQUIPMENT INCLUDED".
 - Examine each piece of equipment and device to see that it is functioning properly and is in good operational condition.
 - Clean all components of dust, old lubricants, etc. to allow the equipment to function as designed.
 - Paint all equipment as needed to prevent and protect against corrosion and

deterioration.

- Lubricate all equipment where needed to permit bearings, gears and all contact wearing points to operate freely and without undue wear.
 - Adjust all linkages, motors, drives, etc. that have drifted from the initial design settings and positions.
 - Calibrate all sensing, monitoring, output, safety, and read-out devices for proper ranges, settings and optimum efficiencies.
 - Repair the device by the addition of replacement parts, should the above maintenance not be adequate.
 - Replace the device should the above maintenance not be adequate.
 - Test and cycle all equipment as a system after it has been cleaned, lubricated adjusted and calibrated to assure that it is in proper operating condition and performing at optimum efficiency.

D. Parts Replacement

- a. All parts, components, or devices for the mechanical systems as listed above that are worn or are not in proper operational condition shall be repaired and/or replaced with new parts, components, or devices.
- b. When equipment or parts are replaced in their entirety and a newer design of this device is available and is functionally equivalent and compatible, the device of the newer design shall be used as the replacement.
- c. All repair and replacement parts, components and devices for the mechanical systems and equipment as listed shall be supplied by the Service Company and shall be included in the cost of the service program.
- d. All miscellaneous parts and supplies necessary to maintain the mechanical systems and equipment shall be supplied by the Service Company and shall be included in the cost of the service program (belts, valve packing's, lubricants, tools, paints, test instruments, meters, etc.)
- e. The Service Company shall not be made responsible for repairs or replacements necessitated by reason of negligence or misuse of the equipment by other than the Service Company, or by reason of any other cause beyond the control of the Service Company, except ordinary wear and tear.
- f. The Service Company shall be available, at no additional charge, for consultation, minor design and equipment changes, or modifications to automatic temperature control and mechanical systems, The Service Company shall be expected to recommend energy saving modifications and low cost - no cost modifications and

operating procedure changes to the owner.

E. Additional Service

1. For other additional services that apply to this equipment maintenance section, refer to the following sections:
 - Maintenance Procedures and Records
 - Predictive Maintenance and Emergency Service

AIR FILTER SERVICE

A. Equipment Included Air Filtration System: Pre-filters, frame filters, pouch filters, fan coil filters, and automatic roll-type filters.

B. Services Included

1. Filter frames shall be of the reusable type and shall be of a permanent rigid construction that shall permit the insertion of media pads and may also allow the use of optional pads with different efficiencies, if needed.
2. Filter frames shall be sized to fill the entire cross section of the units to prevent blow-by and eliminate filter spacers in the system.
3. Filter media shall be of pleated material, with an average efficiency rating of not less than 35% efficiency.
4. The Service Company shall provide, install and regularly change all air filters at a frequency dictated by dirt conditions, but no less than four times per year for frame media and as often as necessary for roll type media.

C. Additional Services

1. For other additional services that apply to this air filter service section, refer to the following sections:
 - Maintenance Procedures and Records
 - Predictive Maintenance and Emergency Service

4. MAINTENANCE PROCEDURES AND RECORDS

- The Service Company shall utilize computer generated Predictive maintenance directions, which indicate tasking functions to be performed on each scheduled service call, as determined by calendar periods, operating hours, (runtime), manufacturer's recommendations and historical data bank, as pertinent to each task.
- As work is due, the Service Company shall issue, to his mechanic on the job, the

necessary and appropriate recommended maintenance procedures and a listing of any special lubricants, tools, etc., that are required for proper maintenance of the apparatus concerned.

- The Service Company's administration system shall provide for continuous updating of maintenance procedures and frequencies. Breakdown experience and frequency shall determine the on-site material inventory level and Predictive maintenance frequencies.
- During the course of the service program, the Service Company shall advise and assist in the determination of improvements to the mechanical system that shall conserve energy and minimize utility expenditures.
- The Service Company must provide detailed documentation and certification of current safety procedures and programs being employed and specifically any experience in working with systems utilized by the customer in their operations.

5. PREDICTIVE MAINTENANCE AND EMERGENCY SERVICE CALLS

A. The Service Company shall schedule and perform the Predictive maintenance services on no less than a quarterly basis.

- After each service call, the owner may immediately access the status and detail of the work order and review work accomplished.
- Two of the scheduled service visits shall include the system start-up and the system shut-down, for the appropriate season

B. The Service Company shall provide emergency service on an as required basis. Emergency service shall be considered as calls in addition to the scheduled Predictive maintenance calls.

- This emergency service shall be provided as often as needed, on a 24-hour basis, weekends and legal holidays included.
- The Service Company shall be capable of responding to an emergency situation within two (2) hours.

6. SERVICE PERFORMANCE GUARANTEES

A. Performance Review

- The owner's agent may review, at any time, the services provided and reports submitted, to verify that the Predictive maintenance is, in fact, being properly and adequately performed. Any lack of maintenance service, complaints or deficiencies in the performance of the services shall be submitted to the Service Company in writing for correction.
- For problems or deficiencies of significant importance or of a continual nature, a time period of compliance shall be established after discussion and mutual agreement. Failure of the Service Company to correct the deficiencies within the time period agreed upon shall constitute cause of termination of the services and/or withholding of payment.

7. SPECIAL CONDITIONS

- The Service Company's responsibility for injury to persons or property that may be caused by, or arise through the maintenance service, functioning, or use of the system shall be limited to injury caused directly the Service Company's negligence in performing the obligations as set forth in this specification. The Service Company shall not be making liable for consequential or speculative damages.
- The Service Company shall not be made liable for any loss, delay, injury, or damage, whether direct or consequential, that may be caused by conditions beyond the Service Company's directly control including, but not limited to, acts of government, strikes, lockouts, fire, explosion, theft, riot, civil commotion, war, malicious mischief, flood and other acts of God.
- The Service Company shall maintain Comprehensive General Liability Insurance. The coverage shall be for amounts not less than: \$100,000 bodily injury each person, \$500,000 bodily injury each occurrence, and \$500,000 property damage each occurrence. A Certificate of Insurance indicating at least these minimum amounts shall be provided by the Service Company and included as part of the proposal.
- The Service Company shall not be required to make safety tests or install new attachment or additional controls or equipment as recommended or directed by an insurance company, laboratory, or governmental authority.
- Access to all devices to be serviced shall be provided for the Service Company. The Service Company shall not be held responsible for equipment malfunction or damage, should access to equipment, or the inability to start and stop primary equipment.
- This specification covers only that equipment as listed herein, and in the event the system is altered, modified, changed or if any equipment is added or not included in

this specification, then that portion shall be added or deleted as required and shall be in accordance with this specification. The service program shall be for a one (1) year period. The annual price may be invoiced monthly or quarterly in advance.

8. TECHNICAL AND BUSINESS PROSPECTUS

A. The Service Company shall provide as part of the proposal a detailed prospectus containing the following required items.

- The date of establishment of the Service Company within the Province of _____, and a complete resume of the service operation, history and other related facts.
- A minimum of five (5) references with contracts in excess of \$25,000.00 for which this service is presently being performed shall be provided within the local service area. References outside this area will not be accepted. Include the Company name, address, owner representative, title, phone number, service contract number, month and year of contract initiation and tonnage of the refrigeration system maintained,
- The, title, function, location, years in the field of equipment maintenance, years with the Service Company and qualifications of all service personnel.
- The name, title, function, location, years in the field of HVAC maintenance, years with Service Company and qualifications of supervisory and management personnel.
- Sample forms, typical service reports, methods of record keeping, computer generated scheduling, etc. That indicates the level of knowledge and degree of experience in the maintenance of mechanical systems. As a minimum, provide for review actual computer generated Predictive maintenance task check lists for three (3) major pieces of equipment on the equipment list, copies of check lists from other customers or hand typed lists are not acceptable.
- The date and name of the person with whom the inspection tour was conducted prior to the proposal submittal.
- Enclose a Certificate of Insurance with the minimum amounts of coverage as described in the section entitled SPECIAL CONDITIONS.
- Enclose the complete EQUIPMENT LIST and signed PROPOSAL FORM.
- Include any additional descriptive literature or information, that is relevant to the specification and/or services proposed, that indicate unique qualifications, particular competence in this field, technical capabilities, proprietary techniques, or special resources.

- All submitted forms, data, documentation, resumes and other information which may be deemed by the service contractor as proprietary or sensitive shall remain his property. Any bidding service contractor may retrieve his entire bid package upon written notification to the owner, but not sooner than fourteen (14) days after bids are due. No aforementioned information from any bidder shall be divulged or copies made of any documentation submitted.

9. PROPOSAL EVALUATION

A. Each Service Company, by the submission of a proposal, assents to each and every term and condition set forth within this specification and agrees to be bound thereby.

B. Any proposal which is incomplete, conditional, or obscure, or which contains irregularities of any kind, may be cause for rejection.

C. The right is reserved to accept or reject any or all proposals, to consider the competency and responsibility of all Service Companies, and to use any information deemed necessary to establish the ability of any Service Company to perform all conditions of the contract in order to avoid awarding a contract to a firm unable to produce the quality of service required and intended by this specification.

E. The following point grading scale will be used for evaluation of the proposals

Prior local experience and references in guaranteed maintenance	25
Cost competitiveness	25
Local company credentials	25
Technical ability in reporting, accounting, and service management	15
Ability and experience to exceed OXY specific requirements	<u>10</u>
	100

10. PROPOSAL FORM

A. PREDICTIVE MAINTENANCE PROGRAM TOTAL ANNUAL COST:

AMOUNT: _____
(\$_____)

B. SERVICE COMPANY:

NAME: _____
ADDRESS: _____

C. SERVICE COMPANY OFFICIAL:

SIGNATURE: _____
TITLE: _____
DATE: _____

11. EQUIPMENT LIST:

QTY.	COMPONENT	LOCATION	MANUFACTURER	MODEL
------	-----------	----------	--------------	-------