

STATE OF OHIO
DEPARTMENT OF ADMINISTRATIVE SERVICES
GENERAL SERVICES DIVISION
OFFICE OF PROCUREMENT SERVICES
4200 SURFACE ROAD, COLUMBUS, OH 43228-1395

MANDATORY USE CONTRACT FOR: PREVENTATIVE MAINTENANCE OF HVAC AND REFRIGERATION SYSTEMS

CONTRACT No.: OT905907

EFFECTIVE DATES: 01/01/07 to 03/31/11
Renewal through 12/31/12 *

The Department of Administrative Services has accepted bids submitted in response to Invitation to Bid No. OT905907 that opened on 12/22/06. The evaluation of the bid response(s) has been completed. The bidder(s) listed herein have been determined to be the lowest responsive and responsible bidder(s) and have been awarded a contract for the items(s) listed. The respective bid response, including the [Terms and Conditions for Bidding, Standard Contract Terms and Conditions, and Supplemental Contract Terms and Conditions](#), special contract terms & conditions, any bid addenda, specifications, pricing schedules and any attachments incorporated by reference and accepted by DAS become a part of this Requirements Contract.

This Requirements Contract is effective beginning and ending on the dates noted above unless, prior to the expiration date, the Contract is renewed, terminated or cancelled in accordance with the Contract Terms and Conditions.

This Requirements Contract is available to NORTHCOAST BEHAVIORAL HEALTHCARE SYSTEM, as applicable.

Agencies are eligible to make purchases of the listed supplies and/or services in any amount and at any time as determined by the agency. The State makes no representation or guarantee that agencies will purchase the volume of supplies and/or services as advertised in the Invitation to Bid.

SPECIAL NOTE: State agencies may make purchases under this Requirements Contract up to \$2500.00 using the state of Ohio payment card. Any purchase that exceeds \$2500.00 will be made using the official state of Ohio purchase order (ADM-0523). Any non-state agency, institution of higher education or Cooperative Purchasing member will use forms applicable to their respective agency.

Questions regarding this and/or the Requirements Contract may be directed to:

Lauren Brown
Lauren.Brown@das.state.oh.us

This Requirements Contract and any Amendments thereto are available from the DAS Web site at the following address:

<http://www.ohio.gov/procure>

*Indicates twenty (20) month mutual renewal effective May 1, 2011 through December 31, 2012.

Signed: _____
Robert Blair, Director Date

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SPECIAL CONTRACT TERMS AND CONDITIONS

DELIVERY AND ACCEPTANCE: Services will be performed as set forth in the Contract and in accordance with paragraphs S-8, S-9, and S-10 of the SUPPLEMENTAL CONTRACT TERMS AND CONDITIONS. The location of performance will be noted on the purchase order issued by the participating agency. Payment for services rendered will occur upon the inspection and written confirmation by the ordering agency that the services provided conform to the requirements set forth in the Contract. Unless otherwise provided in the Contract, payment shall be conclusive except as regards to latent defects, fraud, or such gross mistakes as amount to fraud.

SITE VISIT: Prior to submitting their bid response, the bidder should visit the agencies they are bidding in order to survey the facilities and to become familiar with the requirements of the bid. The bidder must contact each facility to schedule an appointment. To schedule an appointment, please contact Tim Higginbotham (Cleveland Campus) at 216/787-0500 ext. 2807 or Jim Baroni (Northfield Campus) at 330/467-7131 ext. 1261. Once a contract is awarded, failure of the bidder to have requested a site visit to become familiar with the facility and requirements of the bid will be insufficient reason to support any request to be released from the contract.

EVALUATION: Bids will be evaluated in accordance with Article I-5 of the "Instructions to Bidders". The state will calculate the cost for each campus as follows:

- (a.) multiply the monthly cost times twelve to determine the annual cost for each yearly period;
- (b.) multiply the hourly labor cost for service during regular hours by a factor of 50 for each yearly period;
- (c.) multiply the hourly labor cost for service after regular hours by a factor of 10 for each yearly period.
- (d.) add the results of (a.), (b.) and (c.) above.

CONTRACT AWARD: The Contract will be awarded to the lowest responsive and responsible bidder by campus.

FIXED-PRICE WITH IN-SERVICE COST ADJUSTMENTS: The Contractor agrees to adjust the total monthly charges for any decrease/increase in the number of HVAC/refrigeration systems to be serviced due to resident program changes and/or building destruction/construction programs for the duration of the Contract. All adjustments will be in accordance with the Contract.

MATERIAL SAFETY DATA SHEET: The Contractor shall provide a Material Safety Data Sheet (MSDS) for any hazardous chemical that he brings onto the facility property for the performance of this contract. The MSDS shall verify the Contractor's compliance with OSHA Hazard Communications Standard 29 CFR 1910.1200. The MSDS shall be given to the facility contact person prior to use of the hazardous chemical on the facility property.

Part A

SPECIFICATIONS
Cleveland Campus

I. SCOPE

- A. The Contractor shall provide inspection, testing, minor repair, and preventive maintenance of the HVAC and temperature control system at Northcoast Behavioral Healthcare System (NBHS), Cleveland Campus, 1708 Southpoint Drive, Cleveland, OH 44109, as stated herein. The Contractor shall make timely visits as listed in Appendix "A", the Equipment Maintenance Schedule. However, the Contractor shall make more frequent visits, if necessitated by manufacturer's recommendations, and these visits shall be covered by the monthly scheduled costs as submitted by the Contractor and shall not be billed extra to NBHS.
- B. An inventory of equipment covered, locations and frequency of service is detailed in Appendix A.

II. GENERAL DESCRIPTION OF SERVICES

The general services listed below shall apply to the system and equipment as shown on the Equipment Maintenance Schedule.

- A. Examine each piece of equipment and device to see that it is functioning properly and is in good operational condition.
- B. Clean all components of dust, old lubricants, etc. to allow the equipment to function as designed.
- C. Paint all equipment as needed to prevent and protect against corrosion and deterioration.
- D. Lubricate all equipment where needed to permit bearings, gears, and all contact wearing points to operate freely and without undue wear.
- E. Adjust all linkages, motors, drives, etc. that have drifted from the initial design settings and positions.
- F. Calibrate on electric controls only, all sensing, monitoring, output, safety, and read-out devices for proper ranges, settings, and optimum efficiencies.
- G. Test and cycle all electrical controls in 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.

III. REQUIREMENTS The contract service shall include:

- A. Inspection, testing, calibration of electrical controls, and maintenance to the systems to be performed as indicated in Appendix "A". This service will take place the first week of each month (quarter, etc.) covered by this contract.
- B. Keeping records of the service visits and submitting a typed service report to the campus within seven (7) days after each visit.
- C. Providing consulting services by telephone to the campus maintenance personnel with minor troubleshooting.
- D. Providing emergency service, twenty-four (24) hours per day, three hundred sixty-five (365) days per year.

Part A (cont.'d)

SPECIFICATIONS
Cleveland Campus

IV. RESPONSIBILITY OF THE CONTRACTOR

- A. The Contractor shall be responsible for notifying the contact person at the campus no less than two (2) days prior to each service visit to the campus.
- B. Before starting work, Contractor shall discuss with the contact person any problems they are having with the chiller plant and/or associated equipment. Contractor shall investigate reported trouble areas and submit a repair proposal to the contact person.
- C. Contractor shall coordinate service work with the contact person to make equipment available for service.
- D. The Contractor shall be responsible for the acts or neglect of his employees when performing work under this contract. The Contractor's employees shall observe the rules and regulations of the campus when engaged in work under the contract.
- E. All parts used for repair or replacement shall be new. Parts installed in existing equipment need not be of the same manufacturer as the original; however, replacement parts shall be equal to or better than those replaced and shall be completely compatible with the system in function and performance. All used parts removed are to be turned over to the contact person.
- F. Upon completion of an inspection, the Contractor shall leave the system in satisfactory operation; or, if not in operation, the Contractor shall so inform NBHS that it is inoperative, explain why it is inoperative, and what must be done to put it into satisfactory operation.

V. EMERGENCY SERVICE

- A. All planned inspection and/or maintenance service work under these specifications shall be performed during owner's normal working hours (for the purpose of these specifications are 7:00 a.m. to 3:30 p.m., Monday through Friday).
- B. The Contractor shall provide "on call" emergency service twenty-four (24) hours per day, three hundred sixty-five (365) days per year.
- C. Emergency service shall consist of responding to the campus within two (2) hours after NBHS's notification has occurred. Pagers, message machines, or other mechanical recording devices and answering services are acceptable as a communication center.
- D. Emergency service rendered during normal working hours Monday through Friday shall be charged to NBHS at the hourly rate as indicated on "Price Schedule" for normal working hour service.
- E. Emergency service rendered after normal working hours, or on holidays or weekends, shall be charged to NBHS at the hourly rate as indicated on "Price Schedule" for after normal working hour, holiday, and weekend service.
- F. Hourly charges for emergency services should include all costs related to providing this service (i.e. transportation, travel time, personnel, etc.). Hourly charges for emergency service shall commence upon arrival at the facility and end upon departure from the facility.
- G. The Contractor shall be capable of responding at any time during the day or night upon notification by telephone that a situation exists where a shut-down or emergency has occurred. A response time of two (2) hours reporting time to the facility after notification has occurred will be allowed, after which liquidated damages shall accrue in the amount of the Contractor's emergency service hourly rates for each additional hour, or fraction thereof, until emergency service begins.

Part A (cont.'d)

SPECIFICATIONS
Cleveland Campus

- H. Invoices for emergency service shall be forwarded to NBHS (Business Office, Northfield Campus) and shall contain a complete list of material and supplies required, labor cost, and a written report covering the details of the emergency.

VI. SPECIAL CONDITIONS

- A. The owner will provide access to all devices which are to be serviced. The Contractor shall be free to start and stop all primary equipment incidental to the operation of the mechanical systems as arranged with and directed by the contact person. The owner will take responsibility for equipment malfunction where such access is denied.
- B. The Contractor shall not be liable for any loss, delay, injury, or damage, whether direct or consequential, that may be caused by conditions beyond the Contractor's direct control including, but not limited to, acts of government, strikes, lockouts, fire, explosions, theft, riot, civil commotion, war, malicious mischief, floods, and other acts of God.
- C. The Contractor shall not be required to install new devices or make modifications to any equipment to comply with directives of insurance companies or governmental bodies.

VII. REPAIR AND PARTS REPLACEMENT

- A. The Contractor shall provide at his cost all lubricants, oils, filters, belts, condenser fan motors, greases, paints, cleaners, chemicals, coolants, tools, and test instruments to perform the services as specified herein.
- B. Miscellaneous Material and Small Parts: The Contractor shall provide and install at his cost all miscellaneous material and small parts that are normally examined and replaced, when indicated or detected during customary inspections (i.e. clamps, washers, nuts, bolts, indicator lights, etc.).
- C. Repair: All repair and parts replacement not covered under paragraphs VII.A. or VII.B. shall be done only with prior approval of NBHS. The Contractor shall submit a detailed quotation of each item that requires repair or replacement including the labor charge.

NBHS reserves the right to obtain the services of another vendor to complete repairs according to Office of Procurement Services Directives.

- D. All repairs and replacements shall be scheduled during regular working hours, Monday through Friday.
- E. All parts used for repair or replacement shall be new. Parts installed in existing systems, unless otherwise approved by NBHS, shall be of the same manufacturer as the original. If replacement parts of other manufacturers are approved, such parts shall be equal to or better than the original part and shall be completely compatible with the existing system in function and performance.
- F. All parts and material to be supplied by the Contractor that are not covered under paragraph VII.A. or VII.B. shall be invoiced at the quoted percentage above the manufacturer's cost as indicated on the bid response sheet. Copies of the manufacturer's invoices shall be submitted to NBHS Business Office (Northfield Campus) showing the actual cost of each part.

VIII. MAINTAINING RECORDS - REPORTING

- A. The Contractor shall maintain a complete set of records of each scheduled preventive maintenance inspection including, but not limited to, inspection dates, items checked, repairs, maintenance performed, and problems noted.

Part A (cont.'d)

SPECIFICATIONS
Cleveland Campus

- B. Following completion of each scheduled inspection, the Contractor shall review with the facility contact person or his designee, the details of the work just completed and recommendations for necessary repairs or improvements to the system.
- C. Within one (1) week following a scheduled inspection, the Contractor shall submit a typed report to the facility contact person.

IX. CONTRACTOR QUALIFICATIONS AND OTHER REQUIREMENTS

- A. Résumés of technicians: Bidder should include résumés of the service technicians who will be responsible for the work. Technicians must be qualified to keep the equipment properly maintained.
- B. Experience: A minimum of three (3) years experience in commercial HVAC maintenance contracts is required to qualify for bidding. Bidder should include a letter certifying the number of years in this type of business.
- C. References: Bidder should include with this bid, evidence of commercial HVAC maintenance contracts. Bidder shall give name and addresses, phone numbers and contact persons of three (3) customers with whom they have had commercial maintenance contracts for at least three (3) years.
- D. Copy of Preventive Maintenance Work Order: Bidder should include a copy of the preventive maintenance work order form and supporting documentation that the bidder proposes to use. It must at least provide for two (2) inspections within one year, but may include more based upon the bidder's familiarity with the facility's type of system. This schedule shall also include the items/services that will be completed each inspection.
- E. Contractor shall have all the necessary licenses and/or permits to perform complete mechanical maintenance services within Cuyahoga County and the City of Cleveland.
- F. Operating manuals and/or mechanical drawings shall be made available to bidders at the time of site visitation. It is the responsibility of the bidder to verify items and locations on the site. Any omissions do not relieve the bidder/Contractor of the responsibility for maintaining omitted items.
- G. Services shall be performed by qualified and trained service personnel that are directly employed by the Contractor. No work on the equipment covered herein shall be done by subcontractors.
- H. If the Contractor has to replace a technician during the contract term, the newly-assigned technician must be qualified (have sufficient training and experience) to keep the equipment properly maintained. NBHS reserves the right to request a résumé for any newly-assigned technician, and may reject his/her assignment if his/her training and experience are not adequate.

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APPENDIX A
 Cleveland Campus

NUMBER	ITEM	LOCATION	SERVICE DESCRIPTION	FREQUENCY
PM 1	Exhaust unit roof	Vault Room.	Belts: Check, Replace as needed	Semi-annual
		Maintenance Hall	Thermostat: Check, Replace if needed	
			Electrical: Check all connectors, repair as needed	
PM 2	Supply fan and exhaust over cooking area	Dietary	Belts: Check, Replace as needed	Semi-annual
			Electrical: Check all connectors, repair as needed	
			Filters: change, supply clean baffles, check overall operation of unit	
PM 3	Exhaust over oven	On cafeteria roof	Damper: Check operation, repair as needed	Semi-annual
			Motor: lubricate as required	
			Electrical: Check all connectors, repair as needed	
PM 4	Exhaust	Storeroom	Motor: Check operation, lubricate as needed	Semi-annual
			Electrical: Check all connectors, repair as needed	
PM 5	Air handler	Storeroom hallway	Motor: Check operation, lubricate as needed	Quarterly
			Electrical: Check all connectors, repair as needed	
			Bearings: Lubricate as required	
			Damper: Check operation, repair as needed	
			Steam valve and steam traps: Check operation, repair as needed	
			Belts: Check condition, tension, replace as needed	
			Filters: Replace FAR 40/40 4 - 20 x 20 x 2 2 - 16 x 16 x 2	
PM 6	Air handler equipment room	Research 2	Motor: Check operation, lubricate as needed	Quarterly
			Electrical: Check all connectors, repair as needed	
			Bearings: Lubricate as required	
			Damper: Check operation, repair as needed	
			Steam valve and steam traps: Check operation, repair as needed	
			Belts: Check condition, tension, replace as needed	
			Filters: Replace FAR 40/40 4 - 20 x 25 x 2 3 - 20 x 20 x 2 3 - 20 x 16 x 2	
PM 7	Air handler equipment room	Research 3	Motor: Check operation, lubricate as needed	Quarterly
			Electrical: Check all connectors, repair as needed	
			Bearings: Lubricate as required	
			Damper: Check operation, repair as needed	
			Steam valve and steam traps: Check operation, repair as needed	
			Belts: Check condition, tension, replace as needed	
			Filters: Replace FAR 60/60 6 - 20 x 25 x 2	

APPENDIX A (cont.'d)

Cleveland Campus

NUMBER	ITEM	LOCATION	SERVICE DESCRIPTION	FREQUENCY
PM 8	Air handler equipment room	Research 4	Motor: Check operation, lubricate as needed Electrical: Check all connectors, repair as needed Bearings: Lubricate as required Damper: Check operation, repair as needed Steam valve and steam traps: Check operation, repair as needed Belts: Check condition, tension, replace as needed Filters: Replace FAR 40/40 6 - 16 x 25 x 2	Quarterly
PM 9	Air handler equipment room	Research 5	Motor: Check operation, lubricate as needed Electrical: Check all connectors, repair as needed Bearings: Lubricate as required Damper: Check operation, repair as needed Steam valve and steam traps: Check operation, repair as needed Belts: Check condition, tension, replace as needed Filters: Replace FAR 40/40 4 - 16 x 20 x 2 4 - 16 x 25 x 2	Quarterly
PM 10	Heating - zone 4 pumps	Sub-basement left and right	Motor: Check operation, lubricate as needed Electrical: Check all connectors, repair as needed Pump: Lubricate as required, replace seals as needed. Pump couplings: Check and repair as needed	Monthly: October through March only
PM 11	Heat exchanger Pumps & motors - 2	Sub-basement	Motor: Check operation, lubricate as needed Electrical: Check all connectors, repair as needed Pump: Lubricate as required, replace seals as needed. Pump couplings: Check and repair as needed	Semi-annual
PM 12	High pressure Pumps - 2	Sub-basement	Motor: Check operation, lubricate as needed Electrical: Check all connectors, repair as needed Pump: Lubricate as required, replace seals as needed. Pump couplings: Check and repair as needed	Semi-annual
PM 13	Sub-pumps - 2	Sub-basement	Motor: Check operation, lubricate as needed Electrical: Check all connectors, repair as needed Pump: Lubricate as required, replace seals as needed. Pump couplings: Check and repair as needed	Semi-annual

APPENDIX A (cont.'d)

Cleveland Campus

NUMBER	ITEM	LOCATION	SERVICE DESCRIPTION	FREQUENCY
PM 14	Condensate tanks and pumps-2	Sub-basement	Electrical: Check all connectors, repair as needed	Quarterly
			Float switches: Check and replace as needed	
			Pump seals: Check for leaks, replace as needed	
PM 15	HVAC for dietary	Main kitchen	Motor: Check operation, lubricate as needed	Quarterly
			Electrical: Check all connectors, repair as needed	
			Bearings: Lubricate as required	
			Damper: Check operation, repair as needed	
			Steam valve and steam traps: Check operation, repair as needed	
			Belts: Check condition, tension, replace as needed	
			Filters: Replace FAR 40/40 10 - 20 x 25 x 1	
PM 15-1	Condensing unit for dietary HVAC	Roof	Coils: Clean as needed	Quarterly
			Motors: Check operation, repair as needed	during
			Electrical: Check all connectors, repair as needed	cooling
				season
PM 16	Air conditioning unit	Cafeteria	Motor: Check operation, lubricate as needed	Quarterly
			Electrical: Check all connectors, repair as needed	
			Bearings: Lubricate as required	
			Damper: Check operation, repair as needed	
			Steam valve and steam traps: Check operation, repair as needed	
			Belts: Check condition, tension, replace as needed	
			Filters: Replace FAR 60/40	
PM 17	Fan coil units	Throughout Bldg.	Clean, vacuum as needed,	Semi-annual
	A/C		Wipe down exterior as needed,	Monthly
	460 cabinets		Lubricate motor as required,	
			Change filters	
PM 18	Main A/C units	Roof	Fan motor: Lubricate as required, check for normal operation	Quarterly
	condenser units (24)		Fan blade: Secure, vibration free, insure securely mounted, proper RPM	
PM 19	Main A/C units	Roof	Coils: Inspect for leaks, clean as needed	Quarterly
	condenser coils		Cabinets and fan guards: Secure all as required	(Annually in
				June, fresh
				water wash
				all coils)

APPENDIX A (cont.'d)

Cleveland Campus

NUMBER	ITEM	LOCATION	SERVICE DESCRIPTION	FREQUENCY
PM 20	Main A/C units compressors (16)	Roof	Oil levels: Check	Quarterly
			Filter/dryers: Change as needed to remove moisture from system	(Acid test compressor oil annually)
			Piping: Inspect for leaks, repair as needed	
			Crank case heaters: Check for proper operation, repair as needed	
			High & low pressure safety switches: Check operation, repair as needed	
			Suction and discharge pressures: Check and record, report abnormal readings, remedy if possible	
PM 21	Chilled water pumps	10 th floor penthouse	Motor: Check operation, lubricate as needed	Annually in April
			Electrical: Check all connectors, repair as needed	
			Pump: Lubricate as required, replace seals as needed.	
			Pump couplings: Check and repair as needed	
PM 22	Condensate tank and pump	Research equipment room	Electrical: Check all connectors, repair as needed	Quarterly
			Float switches: Check and replace as needed	
			Pump seals: Check for leaks, replace as needed	
PM 23	Air Handler, 4 units	Left 1 and 9 Right 1 and 9	Motor: Check operation, lubricate as needed	Quarterly
			Electrical: Check all connectors, repair as needed	
			Bearings: Lubricate as required	
			Damper: Check operation, repair as needed	
			Steam valve and steam traps: Check operation, repair as needed	
			Belts: Check condition, tension, replace as needed	
			Filters: No size available	
PM 24	Air handler research	Maintenance	Motor: Check operation, lubricate as needed	Quarterly
			Electrical: Check all connectors, repair as needed	
			Bearings: Lubricate as required	
			Damper: Check operation, repair as needed	
			Steam valve and steam traps: Check operation, repair as needed	
			Belts: Check condition, tension, replace as needed	
			Filters: No size available	
PM 25	Chilled water pumps Research A/C	Research equipment room	Motor: Check operation, lubricate as needed	Annually in April
			Electrical: Check all connectors, repair as needed	
			Pump: Lubricate as required, replace seals as needed.	
			Pump couplings: Check and repair as needed	

APPENDIX A (cont.'d)

Cleveland Campus

NUMBER	ITEM	LOCATION	SERVICE DESCRIPTION	FREQUENCY
PM 26	Air handler Tempering (2)	Roof	Motor: Check operation, lubricate as needed	Quarterly
			Electrical: Check all connectors, repair as needed	
			Bearings: Lubricate as required	
			Damper: Check operation, repair as needed	
			Steam valve and steam traps: Check operation, repair as needed	
			Belts: Check condition, tension, replace as needed	
			Filters: No size available	
PM 27	75 ton Chillers (2)	Roof	Fan motor: Lubricate as required, check for normal operation	Quarterly
			Fan blade: Secure, vibration free, insure securely mounted, proper RPM	
			Fan motor: Lubricate as required, check for normal operation	
			Coils: Inspect for leaks, clean as needed	Quarterly
			Cabinets and fan guards: Secure all as required	(Annually in June, fresh water wash all coils)
			Oil levels: Check	Quarterly
			Filter/dryers: Change as needed to remove moisture from system	(Acid test compressor oil annually)
			Piping: Inspect for leaks, repair as needed	
			Crank case heaters: Check for proper operation, repair as needed	
			High & low pressure safety switches: Check operation, repair as needed	
			Suction and discharge pressures: Check and record, report abnormal readings, remedy if possible	

Part B

SPECIFICATIONS
Northfield Campus

I. SCOPE OF WORK

The Contractor shall provide inspection, testing, minor repair, and preventive maintenance of the HVAC, refrigeration, and temperature control system at Northcoast Behavioral Healthcare System, Northfield Campus, 1756 Sagamore Road, Northfield, OH 44067, as stated herein.

II. APPLICABLE DOCUMENTS

MSDS. See Special Contract Terms and Conditions.

III. REQUIREMENTS The contract service must include:

- A. The inspection, testing, calibration, and maintenance to the systems on at least a semi-annual basis. These services shall be performed once during the pre-heating season and once during the pre-cooling season. Scheduling shall be done by the campus contact person, Jim Baroni, (330) 467-7131 ext. 1261. The Contractor shall make at least semi-annual visits (two [2] per year) or as specified on maintenance schedules as listed in Appendix 'B', unless conditions are such that more frequent visits are necessary to maintain the equipment (i.e. manufacturer's specifications; runtime; etc.). Additional visits, if necessary, are covered by the scheduled amount as indicated on bidder's response sheet and shall not be billed extra to the facility.
- B. The equipment inventory and maintenance schedules covered as listed in Appendix B.
- C. Keeping records of the service visits and submitting a service report to the campus after each visit.
- D. Providing consulting services by telephone to campus maintenance personnel with minor troubleshooting.
- E. Providing emergency service, twenty-four (24) hours per day, three hundred sixty-five (365) days per year. This service, if needed, shall be billed extra to the facility.

IV. RESPONSIBILITY OF THE CONTRACTOR

- A. The Contractor shall be responsible for notifying the NBHS, Northfield Campus contact person, no less than 5 working days prior to each service visit to the campus. During the term of the contract, each party shall notify the other appropriate parties of changes in names, etc. of the contact persons.
- B. Before starting work, Contractor shall discuss with the contact person any problems they are having with the system. The Contractor shall investigate reported trouble areas and submit a repair proposal to the contact person if necessary.
- C. The Contractor shall coordinate service work with the contact person to make equipment available for service.
- D. Contractor shall be responsible for the acts or neglect of his employees when performing work under this contract. The Contractor's employees shall observe the rules and regulations of the institution when engaged in work under the contract on the institution's premises.
- E. All parts used for repair or replacement shall be new. Parts installed in existing equipment need not be of the same manufacturer as the original; however, replacement parts shall be equal to or better than those replaced and shall be completely compatible with the system in function and performance. All used parts removed are to be turned over to the NBHS.
- F. Upon completion of an inspection, the Contractor shall leave the system in satisfactory operation; or, if not in operation, he shall so inform the contact person that it is inoperative, explain why it is inoperative, and what must be done to put it into satisfactory operation.

Part B (cont.'d)

SPECIFICATIONS
Northfield Campus

- G. The Contractor shall guarantee the workmanship and material for a period of one (1) year from the date of acceptance by the facility contact person and shall promptly remedy, at Contractor's expense, any defects due thereto which become evident during the guarantee period, and pay all expenses for any damage to other systems or structures resulting from work on the temperature control systems.
- H. The Contractor shall be responsible for the removal and proper disposal of refuse material from facility grounds.
- I. The owner's normal working hours for the purpose of this specification are 7:00 a.m. to 3:30 p.m., Monday through Friday.

V. EMERGENCY SERVICE

- A. Emergency service shall consist of responding within four (4) hours to the facility's needs after notification has occurred. Pagers, message machines or other mechanical recording devices, and answering machines are acceptable as a communication center.
- B. The Contractor shall respond at any time of the day or night upon notification by telephone that a situation exists where a shut-down or emergency has occurred. The Contractor must have adequate personnel available to provide emergency services twenty-four (24) hours per day, three hundred sixty-five (365) days per year.
- C. Emergency service charges shall include all costs related to providing the emergency service and shall commence upon arrival at the facility and cease upon departure from the facility.
- D. Invoices for emergency services shall be forwarded to the facility and shall contain complete list of material and supplies required, labor cost, and a written report covering the details of the emergency.
- E. Emergency service shall be charged to the owner at the hourly service rate quoted ("Price Schedule").

VI. SPECIAL CONDITIONS

- A. The owner will provide access to all devices which are to be serviced. The Contractor shall be free to start and stop all primary equipment incidental to the operation of the mechanical system(s) as arranged with and directed by the campus contact person. The owner will take responsibility for equipment malfunction where such access is denied.
- B. The Contractor shall not be required to install new devices or make modifications to any equipment to comply with directives of insurance companies or governmental bodies.

VII. MINOR REPAIR AND PARTS

- A. The Contractor shall provide, at his cost, all lubricants, oils, breather filters, belts, greases, paints, cleaners, chemicals, coolants, tools, and test instruments to perform the services as specified herein. Air handling filters: panel, pleats, roll medic, etc. are on state contract and will be furnished NBHS. Air handling filters shall be monitored and changed by the Contractor.
- B. Miscellaneous Material and Small Parts: The Contractor shall provide, at his cost, all miscellaneous material and small parts that are normally examined and replaced, when indicated defective and/or missing and detected during customary inspection and preventive maintenance (i.e. clamps, fuses, breather filters, bolts, lubricants, indicator lamps, etc.).

Part B (cont.'d)

SPECIFICATIONS
Northfield Campus

- C. If any equipment or device is found not to be in proper operating condition, and is not included in Section VI.B., above, the Contractor shall present an itemized list containing recommended corrective actions to the contact person. NBHS reserves the right to solicit other bids to complete the repair. Repair shall not commence until prior authorization by NBHS.
- D. All parts used for repair or replacement shall be new. Parts installed in existing equipment need not be of the same manufacturer as the original; however, replacement parts shall be equal to or better than those replaced and shall be completely compatible with the system in function and performance. All used parts removed are to be turned over to the institution.
- E. All labor charges supplied by the Contractor relative to paragraphs VI.B. shall be for the current rate as indicated on the bidder's response sheet for hourly labor charge during normal working hours. Unless in an emergency situation and approved by the facility contact person, all repairs as specified above shall be scheduled during normal working hours.

VIII. ENGINEERING CONSULTATION

The Contractor shall provide engineering consultation by telephone, upon request of NBHS, Northfield Campus maintenance personnel during the contract, without additional charges to NBHS. This engineering consultation shall be provided by a licensed professional engineering staff that is intimately familiar with the facility and equipment. The type of engineering consultation can be problem solving, recommendations, trouble-shooting, etc.

IX. MAINTAINING RECORDS - REPORTING

- A. The Contractor shall maintain a complete set of records of inspection, including but not limited to inspection dates, equipment checked, systems operation and performance status, recommendations for improvements to the system, etc. The records shall be maintained for the term of the contract and surrendered to NBHS upon termination or cancellation of this contract.
- B. Following completion of each inspection, the Contractor's team shall review with the facility contact person, or their designee, the details of the work just completed and inform them of the condition of the systems, and any recommendations for necessary repairs or improvements to the system. The Contractor's team shall provide a written "field" report detailing this information prior to leaving the facility.
- C. Within two (2) weeks following an inspection, the Contractor shall file a formal written report, with the agency contact person.

X. CONTRACTOR'S RESPONSIBILITY

- A. Before starting work at the facility, the Contractor shall notify the facility contact person at least five (5) days in advance of the scheduled site visit. Once at the site, the Contractor shall notify the facility contact of his arrival before starting any work.
- B. The Contractor shall be responsible for the acts of neglect of his employees when performing work under this contract. The Contractor's employees shall observe the rules and regulations of the facility when engaged on work under this contract on the facility's premises. The facility will inform the Contractor of any special rules and regulations.
- C. Inspection, testing, calibration, and preventive maintenance of the automatic temperature control systems at the Agency shall be rendered on a regularly scheduled basis as specified in "Scope of Work" (I.).
- D. No work on the automatic temperature control system shall be done by the Contractor without prior notification and authorization from NBHS contact, Jim Baroni.

Part B (cont.'d)

SPECIFICATIONS
Northfield Campus

XI. TERMS OF PAYMENT

Invoices are to be sent, after quarterly preventive maintenance services are completed, in quadruplicate to NBHS contact, Jim Baroni. All non-scheduled or emergency service shall be invoiced to the facility only after said work is completed. Please include written report, statement of work performed, and your tax I.D. number on all statements and invoices.

XII. GENERAL REQUIREMENTS

- A. **Résumés of technicians:** Bidder should include résumés of the service technicians who will be responsible for the work. Technicians must be qualified to keep the equipment properly maintained.
- B. **Experience:** A minimum of three (3) years experience in commercial HVAC maintenance contracts is required to qualify for bidding. Bidder should include a letter certifying the number of years in this type of business.
- C. **References:** Bidder should include with this bid, evidence of commercial HVAC maintenance contracts. Bidder shall give name and addresses, phone numbers and contact persons of three (3) customers with whom they have had commercial maintenance contracts for at least three (3) years.
- D. **Copy of Preventive Maintenance Work Order:** Bidder should include a copy of the preventive maintenance work order form and supporting documentation that the bidder proposes to use. It must at least provide for two (2) inspections within one year, but may include more based upon the bidder's familiarity with the facility's type of system. This schedule shall also include the items/services that will be completed each inspection.
- E. **Contractor shall have all the necessary licenses and/or permits to perform complete mechanical maintenance services within Cuyahoga County and the City of Northfield.**
- F. **Operating manuals and/or mechanical drawings shall be made available to bidders at the time of site visitation. It is the responsibility of the bidder to verify items and locations on the site. Any omissions do not relieve the bidder/Contractor of the responsibility for maintaining omitted items.**
- G. **Bidder will use trained personnel directly employed or supervised by them. No work on the equipment covered herein shall be done by subcontractors.**
- H. **If the Contractor has to replace a technician during the contract term, the newly-assigned technician must be qualified (have sufficient training and experience) to keep the equipment properly maintained. NBHS reserves the right to request a résumé for any newly-assigned technician, and may reject his/her assignment if his/her training and experience are not adequate.**

APPENDIX B
Northfield Campus
EQUIPMENT LIST

Note: Bidders must visit the site for specific manufacturers and locations

EQUIPMENT	QUANTITY	MANUFACTURER	MAINTENANCE SCHEDULE
Temperature Controls		Siemens	B-1
Compressors	4	Various	B-2
Chiller	1	McQuay	B-2
Air Handling Units	22	Various	B-3
Cooling Tower	1	Various	B-2
Condensate Circulating Pumps	10	Various	B-3
Freezers/Coolers	1 Freezer; 7 Coolers	Various	B-4

APPENDIX B
Northfield Campus
MAINTENANCE SCHEDULES

AUTOMATIC TEMPERATURE CONTROLS
 B-1 LEVEL: SEMI-ANNUAL INSPECTION-HEATING AND COOLING

AIR COMPRESSOR

1. Drain tank and check traps.
2. Change oil and check oil pressure.
3. Check belt and sheaves and change as required.
4. Change suction filter as required.
5. Check high pressure safety valve.
6. Check unloader and check valve.
7. Check motor operating conditions and lubricate.
8. Check PE switch, starter and alternator.
9. Record compressor run time.

REFRIGERATED AIR DRYER

1. Check refrigerant pressure.
2. Check refrigerant temperature.
3. Check condenser and cover grills.
4. Check drain tap and bypass valves.

FILTER AND PRESSURE REDUCING STATION

1. Check particle filters. Change as required.
2. Check oil filter. Change as required.
3. Check pressure reducing valve setting.
4. Check low pressure safety valve.

APPENDIX B (cont.'d)

**Northfield Campus
MAINTENANCE SCHEDULES (cont.d)**

B-1 LEVEL: SEMI-ANNUAL INSPECTION-HEATING AND COOLING (Cont'd)

CHILLER, PUMPS AND ZONE CONTROL

1. Calibrate all controllers.
2. Check all PE switches
3. Check all control valves.
4. Check all auxiliary control devices.

FAN SYSTEMS AND HVAC UNIT CONTROLS

1. Review sequence of operation.
2. Check all dampers and lubricate.
3. Check all control valves.
4. Calibrate all controllers.
5. Check all solenoid air valves, PE switches and air valves.
6. Check all auxiliary control switches.

RECIPROCATING CHILLERS

B-2 LEVEL: PRESEASON AND SEASONAL START-UP INSPECTION

COMPRESSORS

1. Inspect vibration eliminators for secureness and damage.
2. Clean and flush cooling system. Contractor to be responsible to add/replace coolant when applicable, at Contractors expense.
3. Verify setting of oil cooler water (valve) regulator.
4. Change oil and filter element. Contractor responsible to supply oil and filters at Contractor's expense.
5. Tighten terminal connection at heater elements.
6. Test secureness of mounting points, and tighten all major points.
7. Take oil sample for analysis.

CONTROLS

1. Inspect control center; clean and tighten connection; inspect components.
2. Verify operation of bypass valve; verify capacity control reaction.
3. Test low pressure cutout and record; calibrate if needed.
4. Verify operation of oil temperature control.
5. Test oil high temp cutout and record; calibrate if needed.

STARTER

1. Inspect wire insulation for signs of overheating, burns, etc.
2. Measure motor at starter and record reading.
3. Measure operating amperage and record readings.
4. Tighten terminal connections at starter.
5. Measure operating voltage and record readings.
6. Inspect starter for signs of wear, arcing, overheating, burns, etc.

APPENDIX B (cont'd.)

**Northfield Campus
MAINTENANCE SCHEDULES**

B-2 LEVEL: PRESEASON AND SEASONAL START-UP INSPECTION (Cont'd)

OPERATIONAL UNIT

1. Run and record a complete test log on machine.
2. Verify oil level and refrigerant charge.
3. Verify superheat adjustment.
4. Inspect for vibrations and unusual noises in bearings, motors, etc.
5. Inspect moisture indicator for evidence of moisture.
6. Test accuracy of all pressure gauges.
7. Record compressor oil, suction and discharge pressures.
8. Report machine conditions and repair requirements.

COOLING TOWER PRESEASON INSPECTION

PRESEASON INSPECTION

1. Remove all debris from within and around unit and flush as required.
2. Check and clean strainers, bleed, overflow and drain.
3. Lubricate fan motor bearings per manufacturer's recommendation.
4. Check belts, motor pulley and motor mounts. Replace and adjust as required.
5. Inspect electrical connections, contactors, relays and operating/safety controls.
6. Check motor operating conditions.
7. Clean and check motor for proper operation.
8. Check intake strainer probes.

B-3 LEVEL: CENTRAL AIR HANDLING UNITS

ANNUAL INSPECTION

1. Check and clean fan assembly.
2. Lubricate fan bearings per manufacturer's recommendations.
3. Lubricate motor bearings per manufacturer's recommendations.
4. Check belts and sheaves. Replace and adjust as required.
5. Tighten all nuts and bolts.
6. Check motor mounts and vibration pads. Replace and adjust as required.
7. Check motor operating condition.
8. Inspect electrical connections and contacts. Clean as required.
9. Lubricate and adjust associated dampers and linkage.
10. Check fan operation.
11. Clean outside air intake screen.
12. Check and clean drains and drain pans.
13. Change filters using manufacturer's recommendations.
14. Check and clean heating and cooling coils once per year (Spring).
15. Inspect humidifier. Report condition to owner.

SEMI-ANNUAL INSPECTION

1. Lubricate fan bearings per manufacturer's recommendations.
2. Lubricate motor bearings per manufacturer's recommendations.
3. Check belts and sheaves. Replace and adjust as required.
4. Clean outside air intake screen.
5. Check filters. Change as required.
6. Check heating and cooling coils.
7. Inspect humidifier. Report condition to owner.

APPENDIX B (cont.'d)

**Northfield Campus
MAINTENANCE SCHEDULES (cont.d.)**

B-3 LEVEL

CIRCULATING PUMPS
ANNUAL INSPECTION

1. Lubricate pump bearings per manufacturer's recommendations.
2. Lubricate motor bearings per manufacturer's recommendations.
3. Tighten all nuts and bolts. Check motor mounts and vibration pads. Replace and adjust as required.
4. Visually check pump alignment and coupling.
5. Check motor operating condition.
6. Inspect electrical connections and contacts. Clean as required.
7. Check and clean strainers and check hand valves.
8. Inspect mechanical seals.
9. Inspect pump packing. Replace and adjust as required.
10. Verify gauges for accuracy.

SEMI-ANNUAL INSPECTION

1. Lubricate pump bearings per manufacturer's recommendations.
2. Lubricate motor bearings per manufacturer's recommendations.
3. Check suction and discharge pressures.
4. Check packing and mechanical seals.

B-4 LEVEL

COOLERS AND FREEZERS

SEMI-ANNUAL INSPECTION

1. Lubricate motor bearings.
2. Check motor rotation.
3. Check head bolts; tighten if required.
4. Check oil level. Add at Contractor's expense if required.
5. Check oil pressure. If not within allowable limits. Find cause of problem and advise.
6. Check head and suction pressure. If not within allowable limits, find cause of problem and advise.
7. Check operation of and settings of all compressor controls; adjust if required.
8. Check sight glasses and moisture indicators; report condition.
9. Check all refrigerant.
10. Check all compressors with megormeter. Indicate readings on service report.
11. Observe entire refrigeration system for proper operation. Advise and report existing or potential problems.
12. Clean outside condensers with pressure washer (water only) one time per year.

Jackson Comfort Inc. Service Technicians responsible for work at Northfield Campus: Mark Jackson, Brian Bober, Dan Ankney, Chris Brown, Damien Giallanza, Bill Pace, Keith McCann

Jackson Comfort Inc. 24-hour Answering Service: (330) 928-9215

PRICE SCHEDULE

NORTHCOAST BEHAVIORAL HEALTHCARE SYSTEM, CLEVELAND CAMPUS			
HVAC SYSTEMS MAINTENANCE			
ITEM I.D.: 8482	MONTHLY COST	HOURLY LABOR COST DURING REGULAR WORKING HOURS	HOURLY LABOR COST AFTER REGULAR WORKING HOURS, M-F, WEEKENDS AND HOLIDAYS
01/01/07 thru 12/31/07	\$ NO AWARD	\$ NO AWARD	\$ NO AWARD
01/01/08 thru 12/31/08	\$ NO AWARD	\$ NO AWARD	\$ NO AWARD
01/01/09 thru 12/31/09	\$ NO AWARD	\$ NO AWARD	\$ NO AWARD
01/01/10 thru 12/31/10	\$ NO AWARD	\$ NO AWARD	\$ NO AWARD
COST OF REPLACEMENT PARTS AND MATERIAL NOT COVERED UNDER PART A, SECTION VII. A OR B:			
CONTRACTOR'S COST PLUS		% (UPCHARGE NOT TO EXCEED 15%)	

NORTHCOAST BEHAVIORAL HEALTHCARE SYSTEM, NORTHFIELD CAMPUS			
HVAC AND REFRIGERATION SYSTEMS MAINTENANCE			
ITEM I.D.: 3883	MONTHLY COST	HOURLY LABOR COST DURING REGULAR WORKING HOURS	HOURLY LABOR COST AFTER REGULAR WORKING HOURS, M-F, WEEKENDS AND HOLIDAYS
01/01/07 thru 12/31/07	\$463.00	\$80.00	\$120.00
01/01/08 thru 12/31/08	\$472.00	\$82.00	\$123.00
01/01/09 thru 12/31/09	\$481.00	\$84.00	\$126.00
01/01/10 thru 12/31/10	\$491.00	\$86.00	\$129.00
* OAKS ITEM ID# 21382: COST OF REPLACEMENT PARTS AND MATERIAL NOT COVERED UNDER PART B, SECTION VII. A OR B:			
CONTRACTOR'S COST PLUS		15 % (UPCHARGE NOT TO EXCEED 15%)	

* Added OAKS Item ID for parts only effective 02/14/12.

CONTRACTOR INDEX

CONTRACTOR AND TERMS:

BID CONTRACT NO.: OT905907-1 (04/30/11) *



54994
Jackson Comfort Systems, Inc.
499 E. Twinsburg Road
Northfield, OH 44067

DELIVERY: per ITB schedule

TERMS: Net 30 Days

CONTRACTOR'S CONTACT: Gary Jackson

Toll Free: (800) 552-2576
Telephone: (330) 468-3111
FAX: (330) 467-2427
E-Mail: gary@jacksoncomfort.com

CONTRACTOR'S MIS CONTACT: Gary Jackson

Telephone: (330) 468-3111

*Contract renewed utilizing unilateral agreement for thirty (30) days effective 04/01/11 through 04/30/11.

SUMMARY OF AMENDMENTS

Amendment Number	Revision Date	Description
5	08/23/12	This amendment is issued to advise that the subject contract will expire on December 31, 2012 and will not be renewed. Agencies shall utilize their direct purchasing authority in accordance with ORC 125.05 to obtain these services.
4	02/14/12	Added OAKS Item ID for parts only effective 02/14/12.
3	05/01/11	To notify that as a result of mutual agreement, this amendment is issued to renew the subject contract for an additional twenty (20) months, effective May 1, 2011 through December 31, 2012. All other prices, terms and conditions remain unchanged.
2	04/01/11	To notify that as a result of unilateral agreement, this amendment is issued to renew the subject contract for an additional one (1) month, effective April 1, 2011 through April 30, 2011. All other prices, terms and conditions remain unchanged.
1	12/30/10	To notify that as a result of mutual agreement, this amendment is issued to renew the subject contract for an additional three (3) months, effective January 1, 2011 through March 31, 2011. This amendment is also issued to indicate an update to the contract analyst information. All other prices, terms and conditions remain unchanged.