



Solicitation #:

Solicitation Issue Date:

Brief Description of Requirement:

Response Due Date¹:

Time:

CST/CDT

Issued By and **RETURN SEALED BID TO**²:

Agency Name:

- U.S. Postal Delivery:
- Carrier Delivery:

Solicitation Type (type "X" at one below):

- Invitation to Bid
- Request for Proposal
- Request for Quote

1. Shipping Location:

2. Contracting Officer:

Name:

Phone:

Email:

¹ Amendments to solicitation may change the Response Due Date (read GENERAL PROVISIONS, section 3, "Solicitation Amendments")

² If "U.S. Postal Delivery" differs from "Carrier Delivery", use "Carrier Delivery" for courier or personal deliveries



"Certification for Competitive Bid and Contract" (see page 3) **MUST** be submitted along with the response to the Solicitation.

1. RE: Solicitation # _____

2. Bidder General Information:

FEI / SSN : _____ VEN ID: _____

Company Name: _____

3. Bidder Contact Information:

Address: _____

City: _____ State: _____ Zip Code: _____

Contact Name: _____

Contact Title: _____

Phone #: _____ FAX#: _____

Email: _____ Website: _____

4. Oklahoma Sales Tax Permit¹ (type "X" at one below):

YES – Permit #: _____

NO – Exempt pursuant to Oklahoma Laws or Rules

5. Registration with the Oklahoma Secretary of State (type "X" at one below):

YES - Filing Number: _____

NO - Prior to the contract award, the successful bidder will be required to register with the Secretary of State or must attach a signed statement that provides specific details supporting the exemption the supplier is claiming (www.sos.ok.gov or 405-521-3911).

6. Workers' Compensation Insurance Coverage:

Bidder is required to provide with the bid a certificate of insurance showing proof of compliance with the Oklahoma Workers' Compensation Act (type "X" at one below):

YES – include a certificate of insurance with the bid

NO - attach a signed statement that provides specific details supporting the exemption you are claiming from the Workers' Compensation Act (Note: Pursuant to Attorney General Opinion #07-8, the exemption from 85 O.S. 2011, § 311 applies only to employers who are natural persons, such as sole proprietors, and does not apply to employers who are entities created by law, including but not limited to corporations, partnerships and limited liability companies.)²

Authorized Signature

Date

Printed Name

Title

¹ For frequently asked questions concerning Oklahoma Sales Tax Permit, see <http://www.tax.ok.gov/faq/fagbussales.html>

² For frequently asked questions concerning workers' compensation insurance, see <http://www.ok.gov/oid/fags.html#c221>



NOTE: A certification shall be included with any competitive bid and/or contract exceeding \$5,000.00 submitted to the State for goods or services.

Solicitation or Purchase Order #: _____

Supplier Legal Name: _____

SECTION I [74 O.S. § 85.22]:

A. For purposes of competitive bid,

- 1. I am the duly authorized agent of the above named bidder submitting the competitive bid herewith, for the purpose of certifying the facts pertaining to the existence of collusion among bidders and between bidders and state officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to said bid;
2. I am fully aware of the facts and circumstances surrounding the making of the bid to which this statement is attached and have been personally and directly involved in the proceedings leading to the submission of such bid; and
3. Neither the bidder nor anyone subject to the bidder's direction or control has been a party:
a. to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding,
b. to any collusion with any state official or employee as to quantity, quality or price in the prospective contract, or as to any other terms of such prospective contract, nor
c. in any discussions between bidders and any state official concerning exchange of money or other thing of value for special consideration in the letting of a contract, nor
d. to any efforts or offers with state agency or political subdivision officials or others to create a sole brand acquisition or a sole source acquisition in contradiction to 74 O.S. 85.45j.1.

B. I certify, if awarded the contract, whether competitively bid or not, neither the contractor nor anyone subject to the contractor's direction or control has paid, given or donated or agreed to pay, give or donate to any officer or employee of the State of Oklahoma any money or other thing of value, either directly or indirectly, in procuring this contract herein.

SECTION II [74 O.S. § 85.42]:

For the purpose of a contract for services, the supplier also certifies that no person who has been involved in any manner in the development of this contract while employed by the State of Oklahoma shall be employed by the supplier to fulfill any of the services provided for under said contract.

The undersigned, duly authorized agent for the above named supplier, by signing below acknowledges this certification statement is executed for the purposes of:

[] the competitive bid attached herewith and contract, if awarded to said supplier;

OR

[] the contract attached herewith, which was not competitively bid and awarded by the agency pursuant to applicable Oklahoma statutes.

Supplier Authorized Signature

Certified This Date

Printed Name

Title

Phone Number

Email

Fax Number

A. GENERAL PROVISIONS

A.1. Definitions

As used herein, the following terms shall have the following meaning unless the context clearly indicates otherwise:

- A.1.1. "Acquisition" means items, products, materials, supplies, services, and equipment a state agency acquires by purchase, lease purchase, lease with option to purchase, or rental pursuant to the Oklahoma Central Purchasing Act;
- A.1.2. "Bid" means an offer in the form of a bid, proposal, or quote a bidder submits in response to a solicitation;
- A.1.3. "Bidder" means an individual or business entity that submits a bid in response to a solicitation;
- A.1.4. "Solicitation" means a request or invitation by the State Purchasing Director or a state agency for a supplier to submit a priced offer to sell acquisitions to the state. A solicitation may be an invitation to bid, request for proposal, or a request for quotation; and
- A.1.5. "Supplier" or "vendor" means an individual or business entity that sells or desires to sell acquisitions to state agencies.

A.2. Bid Submission

- A.2.1. Submitted bids shall be in strict conformity with the instructions to bidders and shall be submitted with a completed Responding Bidder Information, OMES-FORM-CP-076, and any other forms required by the solicitation.
- A.2.2. Bids shall be submitted to the procuring agency in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.
- A.2.3. The required certification statement, "Certification for Competitive Bid and/or Contract (Non-Collusion Certification)", OMES-FORM-CP-004, must be made out in the name of the bidder and must be properly executed by an authorized person, with full knowledge and acceptance of all its provisions.
- A.2.4. All bids shall be legible and completed in ink or with electronic printer or other similar office equipment. Any corrections to bids shall be identified and initialed in ink by the bidder. Penciled bids and penciled corrections shall NOT be accepted and will be rejected as non-responsive. In addition to a hard copy submittal, the bidder will also be required to submit an electronic copy. Electronic responses must be submitted in the identical format contained in the solicitation (for example Microsoft Word, Microsoft Excel, but not Adobe PDF). In the event the hard copy of the price worksheets and electronic copy of the price worksheets do not agree, the electronic copy will prevail.
- A.2.5. All bids submitted shall be subject to the Oklahoma Central Purchasing Act, Central Purchasing Rules, and other statutory regulations as applicable, these General Provisions, any Special Provisions, solicitation specifications, required certification statement, and all other terms and conditions listed or attached herein—all of which are made part of this solicitation.

A.3. Solicitation Amendments

- A.3.1. If an "Amendment of Solicitation", OMES-FORM-CP-011, is issued, the bidder shall acknowledge receipt of any/all amendment(s) to solicitations by signing and returning the solicitation amendment(s). Amendment acknowledgement(s) may be submitted with the bid or may be forwarded separately. If forwarded separately, amendment acknowledgement(s) must contain the solicitation number and response due date and time on the front of the envelope. The procuring agency must receive the amendment acknowledgement(s) by the response due date and time specified for receipt of bids for the bid to be deemed responsive. Failure to acknowledge solicitation amendments may be grounds for rejection.
- A.3.2. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the solicitation. All amendments to the solicitation shall be made in writing by the procuring agency.
- A.3.3. It is the Bidder's responsibility to check frequently for any possible amendments that may be issued. The procuring agency is not responsible for a bidder's failure to download any amendment documents required to complete a solicitation.

A.4. Bid Change

If the bidder needs to change a bid prior to the solicitation response due date, a new bid shall be submitted to the procuring agency with the following statement "This bid supersedes the bid previously submitted" in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.

A.5. Certification Regarding Debarment, Suspension, and Other Responsibility Matters

By submitting a response to this solicitation:

- A.5.1. The prospective primary participant and any subcontractor certifies to the best of their knowledge and belief, that they and their principals or participants:
 - A.5.1.1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal, State or local department or agency;
 - A.5.1.2. Have not within a three-year period preceding this proposal been convicted of or pled guilty or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) contract; or for violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - A.5.1.3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph A.5.1.2. of this certification; and
 - A.5.1.4. Have not within a three-year period preceding this application/proposal had one or more public (Federal, State, or local) contracts terminated for cause or default.
- A.5.2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to its solicitation response.

A.6. Bid Opening

Sealed bids shall be opened by the _____ located at _____
_____ at the time and date specified in the solicitation as the Response Due Date and Time.

A.7. Open Bid / Open Record

Pursuant to the Oklahoma Public Open Records Act, a public bid opening does not make the bid(s) immediately accessible to the public. The procurement or contracting agency shall keep the bid(s) confidential, and provide prompt and reasonable access to the records only after a contract is awarded or the solicitation is cancelled. This practice protects the integrity of the competitive bid process and prevents excessive disruption to the procurement process. The interest of achieving the best value for the State of Oklahoma outweighs the interest of vendors immediately knowing the contents of competitor's bids. [51 O.S. § 24A.5(5)]

Additionally, financial or proprietary information submitted by a bidder may be designated by the Purchasing Director as confidential and the procurement entity may reject all requests to disclose information designated as confidential pursuant to 62 O.S. (2012) § 34.11.1(H)(2) and 74 O.S. (2011) § 85.10. Bidders claiming any portion of their bid as proprietary or confidential must specifically identify what documents or portions of documents they consider confidential and identify applicable law supporting their claim of confidentiality. The State Purchasing Director shall make the final decision as to whether the documentation or information is confidential pursuant to 74 O.S. § 85.10. Otherwise, documents and information a bidder submits as part of or in connection with a bid are public records and subject to disclosure after contract award or the solicitation is cancelled.

A.8. Late Bids

Bids received by the procuring agency after the response due date and time shall be deemed non-responsive and shall NOT be considered for any resultant award.

A.9. Legal Contract

- A.9.1. Submitted bids are rendered as a legal offer and any bid, when accepted by the procuring agency, shall constitute a contract.
- A.9.2. The Contract resulting from this solicitation may consist of the following documents in order of preference:
 - A.9.2.1. Purchase order, as amended by Change Order (if applicable);
 - A.9.2.2. Solicitation, as amended (if applicable); and
 - A.9.2.3. Successful bid (including required certifications), to the extent the bid does not conflict with the requirements

of the solicitation or applicable law.

A.9.3. Any contract(s) awarded pursuant to the solicitation shall be legibly written or typed.

A.10. Pricing

A.10.1. Bids shall remain firm for a minimum of sixty (60) days from the solicitation closing date.

A.10.2. Bidders guarantee unit prices to be correct.

A.10.3. In accordance with 74 O.S. §85.40, ALL travel expenses to be incurred by the supplier in performance of the Contract shall be included in the total bid price/contract amount.

A.11. Manufacturers' Name and Approved Equivalent

Unless otherwise specified in the solicitation, manufacturers' names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition. Bidder may offer any brand for which they are an authorized representative, and which meets or exceeds the specification for any item(s). However, if bids are based on equivalent products, indicate on the bid form the manufacturer's name and number. Bidder shall submit sketches, descriptive literature, and/or complete specifications with their bid. Reference to literature submitted with a previous bid will not satisfy this provision. The bidder shall also explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. Bids that do not comply with these requirements are subject to rejection.

A.12. Clarification of Solicitation

A.12.1. Clarification pertaining to the contents of this solicitation shall be directed in writing to the Contracting Officer specified in the solicitation.

A.12.2. If a bidder fails to notify the State of an error, ambiguity, conflict, discrepancy, omission or other error in the SOLICITATION, known to the bidder, or that reasonably should have been known by the bidder, the bidder shall submit a bid at its own risk; and if awarded the contract, the bidder shall not be entitled to additional compensation, relief, or time, by reason of the error or its later correction. If a bidder takes exception to any requirement or specification contained in the SOLICITATION, these exceptions must be clearly and prominently stated in their response.

A.12.3. Bidders who believe proposal requirements or specifications are unnecessarily restrictive or limit competition may submit a written request for administrative review to the State prior to the closing date.

A.13. Rejection of Bid

The State reserves the right to reject any bids that do not comply with the requirements and specifications of the solicitation. A bid may be rejected when the bidder imposes terms or conditions that would modify requirements of the solicitation or limit the bidder's liability to the State. Other possible reasons for rejection of bids are listed in OAC 580:16-7-32.

A.14. Award of Contract

A.14.1. The State Purchasing Director may award the Contract to more than one bidder by awarding the Contract(s) by item or groups of items, or may award the Contract on an ALL OR NONE basis, whichever is deemed by the State Purchasing Director to be in the best interest of the State of Oklahoma.

A.14.2. Contract awards will be made to the lowest and best bidder(s) unless the solicitation specifies that best value criteria is being used.

A.14.3. In order to receive an award or payments from the State of Oklahoma, suppliers must be registered. The vendor registration process can be completed electronically through the OMES website at the following link: <https://www.ok.gov/dcs/vendors/index.php>.

A.15. Contract Modification

A.15.1. The Contract is issued under the authority of the State Purchasing Director who signs the Contract. The Contract may be modified only through a written Contract Modification, signed by the State Purchasing Director.

A.15.2. Any change to the Contract, including but not limited to the addition of work or materials, the revision of payment terms, or the substitution of work or materials, directed by a person who is not specifically authorized by the procuring agency in writing, or made unilaterally by the supplier, is a breach of the Contract. Unless otherwise specified by applicable law or rules, such changes, including unauthorized written Contract Modifications, shall be void and without effect, and the supplier shall not be entitled to any claim under this Contract based on those changes. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the resultant Contract.

A.16. Delivery, Inspection and Acceptance

- A.16.1. Unless otherwise specified in the solicitation or awarding documents, all deliveries shall be F.O.B. Destination. The bidder(s) awarded the Contract shall prepay all packaging, handling, shipping and delivery charges and firm prices quoted in the bid shall include all such charges. All products and/or services to be delivered pursuant to the Contract shall be subject to final inspection and acceptance by the State at destination. "Destination" shall mean delivered to the receiving dock or other point specified in the purchase order. The State assumes no responsibility for goods until accepted by the State at the receiving point in good condition. Title and risk of loss or damage to all items shall be the responsibility of the supplier until accepted by the receiving agency. The supplier(s) awarded the Contract shall be responsible for filing, processing, and collecting any and all damage claims accruing prior to acceptance.
- A.16.2. Supplier(s) awarded the Contract shall be required to deliver products and services as bid on or before the required date. Deviations, substitutions or changes in products and services shall not be made unless expressly authorized in writing by the procuring agency.

A.17. Invoicing and Payment

- A.17.1. Pursuant to 74 O.S. §85.44(B), invoices will be paid in arrears after products have been delivered or services provided.
- A.17.2. Interest on late payments made by the State of Oklahoma is governed by 62 O.S. §34.71 and 62 O.S. §34.72.

A.18. Tax Exemption

State agency acquisitions are exempt from sales taxes and federal excise taxes. Bidders shall not include these taxes in price quotes.

A.19. Audit and Records Clause

- A.19.1. As used in this clause, "records" includes books, documents, accounting procedures and practices, and other data, regardless of type and regardless of whether such items are in written form, in the form of computer data, or in any other form. In accepting any Contract with the State, the successful bidder(s) agree any pertinent State or Federal agency will have the right to examine and audit all records relevant to execution and performance of the resultant Contract.
- A.19.2. The successful bidder(s) awarded the Contract(s) is required to retain records relative to the Contract for the duration of the Contract and for a period of seven (7) years following completion and/or termination of the Contract. If an audit, litigation, or other action involving such records is started before the end of the seven (7) year period, the records are required to be maintained for two (2) years from the date that all issues arising out of the action are resolved, or until the end of the seven (7) year retention period, whichever is later.

A.20. Non-Appropriation Clause

The terms of any Contract resulting from the solicitation and any Purchase Order issued for multiple years under the Contract are contingent upon sufficient appropriations being made by the Legislature or other appropriate government entity. Notwithstanding any language to the contrary in the solicitation, purchase order, or any other Contract document, the procuring agency may terminate its obligations under the Contract if sufficient appropriations are not made by the Legislature or other appropriate governing entity to pay amounts due for multiple year agreements. The Requesting (procuring) Agency's decisions as to whether sufficient appropriations are available shall be accepted by the supplier and shall be final and binding.

A.21. Choice of Law

Any claims, disputes, or litigation relating to the solicitation, or the execution, interpretation, performance, or enforcement of the Contract shall be governed by the laws of the State of Oklahoma.

A.22. Choice of Venue

Venue for any action, claim, dispute or litigation relating in any way to the Contract shall be in Oklahoma County, Oklahoma.

A.23. Termination for Cause

- A.23.1. The supplier may terminate the Contract for default or other just cause with a 30-day written request and upon written approval from the procuring agency. The State may terminate the Contract for default or any other just cause upon a 30-day written notification to the supplier.
- A.23.2. The State may terminate the Contract immediately, without a 30-day written notice to the supplier, when violations are found to be an impediment to the function of an agency and detrimental to its cause, when conditions preclude the 30-day notice, or when the State Purchasing Director determines that an administrative error occurred prior to Contract performance.

A.23.3. If the Contract is terminated, the State shall be liable only for payment for products and/or services delivered and accepted.

A.24. Termination for Convenience

A.24.1. The State may terminate the Contract, in whole or in part, for convenience if the State Purchasing Director determines that termination is in the State's best interest. The State Purchasing Director shall terminate the Contract by delivering to the supplier a Notice of Termination for Convenience specifying the terms and effective date of Contract termination. The Contract termination date shall be a minimum of 60 days from the date the Notice of Termination for Convenience is issued by the State Purchasing Director.

A.24.2. If the Contract is terminated, the State shall be liable only for products and/or services delivered and accepted, and for costs and expenses (exclusive of profit) reasonably incurred prior to the date upon which the Notice of Termination for Convenience was received by the supplier.

A.25. Insurance

The successful bidder(s) awarded the Contract shall obtain and retain insurance, including workers' compensation, automobile insurance, medical malpractice, and general liability, as applicable, or as required by State or Federal law, prior to commencement of any work in connection with the Contract. The supplier awarded the Contract shall timely renew the policies to be carried pursuant to this section throughout the term of the Contract and shall provide the procuring agency with evidence of such insurance and renewals.

A.26. Employment Relationship

The Contract does not create an employment relationship. Individuals performing services required by this Contract are not employees of the State of Oklahoma or the procuring agency. The supplier's employees shall not be considered employees of the State of Oklahoma nor of the procuring agency for any purpose, and accordingly shall not be eligible for rights or benefits accruing to state employees.

A.27. Compliance with the Oklahoma Taxpayer and Citizen Protection Act of 2007

By 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.

A.28. Compliance with Applicable Laws

The products and services supplied under the Contract shall comply with all applicable Federal, State, and local laws, and the supplier shall maintain all applicable licenses and permit requirements.

A.29. Special Provisions

Special Provisions set forth in SECTION B apply with the same force and effect as these General Provisions. However, conflicts or inconsistencies shall be resolved in favor of the Special Provisions.

B. SPECIAL PROVISIONS

B.1. Indemnification

The successful bidder shall agree to indemnify and hold the OSBI harmless against any and all bodily injury and property damage, deficiencies or liabilities resulting from any negligence on the part of the vendor or non-fulfillment of any term or condition of this contract. The successful bidder shall indemnify and hold harmless the OSBI under this contract from any and all assessments, judgments, costs, legal and other reasonable expenses incidental to any of the foregoing. Neither party shall be liable for any loss, damage or delay due to any cause beyond our reasonable control including, but not limited to acts of government, strikes, lockouts, other labor disputes, fire explosion, theft, floods, water, weather, earthquake, riot, civil commotion, war, vandalism, misuse, abuse, mischief, or acts of God.

The successful bidder shall indemnify and hold the OSBI harmless from damages or losses sustained by the OSBI due solely to personal injury or property damage occurring during the performance of the work and only to the extent directly caused by the OSBI's negligence or the negligence of the successful bidder's employees, agents or subcontractors.

Notwithstanding any other agreement or provision to the contrary, under no circumstances will either party be liable for any indirect, special or consequential damages of any kind.

B.2. Signed Agreement

THIS SOLICITATION, ALONG WITH RESULTANT PURCHASE ORDER, CONSTITUTES THE ENTIRE AGREEMENT. NO ADDITIONAL AGREEMENTS OR END USER LICENSING AGREEMENTS WILL BE SIGNED.

B.3. Unequivocal Acceptance

All terms identified in the bid specifications/contract are inclusive. By its response (execution), successful bidder agrees to terms and conditions of the bid specifications unless a variation or exception is specifically noted. Any variation or exception may disqualify the response.

B.4. Price

Successful bidder warrants that prices of materials, equipment, and services set forth herein do not exceed those charged by the successful bidder to any other customer purchasing the same goods or services under similar conditions and in like or similar quantities.

Proposals shall remain firm for a minimum of sixty (60) days from the solicitation closing date.

B.5 Invoices

Successful bidder will invoice the OSBI in arrears of product provided. Claims for reimbursement of services shall be submitted in arrears and within 90 calendar days of the provision of services. The successful bidder will send one copy of their invoice bearing the purchase order number, time period and amount due to:

OSBI

Attn: Accounting

6600 N. Harvey Place

OKLAHOMA CITY, OKLAHOMA, 73116

B.5. Assignment

Successful bidder's obligation under this Agreement may not be assigned or transferred to any other person, firm or corporation without prior written consent of the OSBI.

B.6. Severability

If any provision of this Agreement shall be held to be invalid or unenforceable for any reason, the remaining provisions shall continue to be valid and enforceable. If a court finds that any provision of this Agreement is invalid or unenforceable, but that by limiting such provision it would become valid and enforceable, then such provision shall be deemed to be written, construed, and enforced as so limited.

B.7. Waiver of Contractual Right

The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Agreement.

B.8. Gratuities

The right of the successful supplier to perform under contract may be terminated by written notice if the Contracting Officer determines that the successful supplier, or its agents or another representative offered or gave a gratuity (e.g. entertainment or gift) to an officer, official, or employee of the State.

B.9. Limitation of Liability

Successful bidder shall be liable for any damages resulting from, arising out of, or relating to the services provided through this agreement. Supplier's liability for all programs, including software products owned or distributed by the Supplier, program documentation, and any program updates acquired through technical support shall be limited to the Supplier's warranty.

To the extent any limitation of liability contained herein is construed by a court of competent jurisdiction to be a limitation of liability in violation of Oklahoma law, such limitation of liability shall be void.

B.10. Failure to Provide

The Supplier's repeated failure to provide defined services, without reasonable basis as determined by the OSBI, shall constitute a material breach of the contractor's obligations, which may result in cancellation of the contract.

C. SOLICITATION SPECIFICATIONS

C.1. Purpose

The Oklahoma State Bureau of Investigation Forensic Science Center located at 800 E. 2nd Street, Edmond, Oklahoma, possesses one (1) Otis Gen 2® Elevator with an Elite® enhancement package with a Pulse® monitoring system (automated belt inspection system). There is a dedicated telephone line for the REM® maintenance package with the unit.

The successful bidder shall use a preventive maintenance management system to deliver service tailored to this facility's specific needs. Equipment type, component life, equipment usage and building environment will be taken into account by the OMMS® (equivalent or better) scheduling system, which will be used to plan maintenance activities in advance. The units will be provided with devices to monitor equipment usage. Use the OMMS® standard work processes (equivalent or better) developed and continuously improved by Otis.

The successful bidder shall maintain the elevator unit using trained personnel directly employed and supervised by the successful bidder. The maintenance will include inspection, lubrication, adjustment, and, if conditions warrant, repair or replacement of following parts:

- C.1.1.** Controller parts, selectors and dispatching equipment, relays, solid-state components, transducers, resistors, condensers, power amplifiers, transformers, contacts, leads, dashpots, timing devices, computer and microcomputer devices, steel selector tapes, mechanical and electrical driving equipment, signal lamps and position indicating equipment.
- C.1.2.** Door operators, car door hangers, car door contacts, door protective devices, load weighing equipment, car frames, car safety mechanisms, platforms, car and counterweight guide shoes including rollers and gibs and emergency car lighting.
- C.1.3.** Hoistway door interlocks and hangers, bottom door guides and auxiliary door closing devices.
- C.1.4.** Machines, worms, gears, thrust bearings, drive sheaves, drive sheave shaft bearings, brake pulleys, brake coils, contacts, linings and component parts.
- C.1.5.** Governor components, governor sheaves and shaft assemblies, bearings, contacts, governor jaws, deflector or secondary sheaves, car and counterweight buffers, car and counterweight guide rails, car and counterweight sheave

assemblies, top and bottom limit switches, governor tension sheave assemblies and compensating sheave assemblies.

- C.1.6.** Pumps, pump motors, operating valves, valve motors, leveling valves, plunger packings, exposed piping, above ground plungers and cylinders and hydraulic fluid tanks.
- C.1.7.** Replace all wire ropes or coated steel belts as often as necessary to maintain an appropriate factor of safety. As conditions, usage, or Code warrants, the successful bidder will equalize the tension on hoisting ropes, resocket ropes for drum machines and repair or replace conductor cables and elevator wiring within the hoistway and the machine-room.
- C.1.8.** During the term of this contract, the successful bidder will maintain a parts inventory either in the elevator machine room or as part of the bidder's mobile inventory, a supply of frequently used replacement parts and lubricants selected to meet Otis (equivalent or better) specific routine requirements of the units. Any parts replaced under this contract will be with new parts manufactured or selected by Otis (equivalent or better) or with parts refurbished to Otis standards (equivalent or better). Replacement parts stored in the machine room remain the property of the OSBI. The successful bidder will further agree to maintain a supply of routine replacement parts in a local warehouse inventory and/or the successful bidder's service center, available for express delivery in case of emergencies.
- C.1.9.** The successful bidder will maintain a supply of Otis major components (equivalent or better) available for emergency replacement in the warehouse inventory. This inventory will include (but not limited to) generator rotating elements, motor rotating elements, brake magnets, solid-state components, selector tapes, and door operator motors. Major components will be in the warehouse inventory or available for express delivery from facilities located throughout North America.
- C.1.10.** The successful bidder will periodically conduct field audits of their personnel and their units to maintain quality standards. The field engineers will provide technical assistance, technical information and Code consultation to support the maintenance organization.
- C.1.11.** The successful bidder, at the OSBI's request, will provide access to e*Service via Otis.com and OTISLINE® 24-hours, year-round dispatching service (equivalent or better). In the event a unit malfunction occurs between regular examinations, the OSBI will be able to place a service call to a customer service representative who will, at the OSBI's

request, dispatch an examiner to perform service. In the event the successful bidder receives an American with Disabilities Act (ADA) call outside of regular working hours, the successful bidder shall make at least one attempt to contact a building representative for an assessment of the situation and authorization to respond to the call. If the successful bidder is unable to timely reach a building representative, the successful bidder shall respond to the ADA call as an authorized callback outside of regular working hours.

- C.1.12.** At the OSBI's request, a representative will be available to discuss our elevator needs in area of modernization, traffic handling ability, recommendation and requirements of Code authorities, proper use and care of the units, and the OMMS® program. There is no additional charge for this consulting service, but by making this service available to the customer, the successful bidder does not assume any duty to warn.
- C.1.13.** The successful bidder will use the OMMS® program (equivalent or better) to record completion of maintenance procedures. The successful bidder, at the OSBI's request, will provide the OSBI this program. The customer will be able to access twelve (12) months of repair, completed maintenance procedures and service call history for the unit. The customer will be responsible for obtaining Internet access to use e*Service (equivalent or better).
- C.1.14.** The successful bidder will periodically examine the safety devices and governors of the units.
- C.1.15.** The successful bidder will conduct an annual no load test and perform at each fifth year a full load, full speed test of all safety mechanisms, overspeed governors and car and counterweight buffers. If required, the governor will be recalibrated and sealed for proper tripping speed, and elevator car balances will be checked.
- C.1.16.** As required by Code, or once every five years at a minimum, the successful bidder will measure the coated steel belts for factor of safety using a method approved by the manufacturer. When providing annual and/or five-year inspections, the successful bidder will be responsible for contacting/coordinating the QEI Inspector or the Oklahoma Department of Labor Inspector to be onsite when the inspection is being conducted.
- C.1.17.** The successful bidder will annually provide the required QEI Inspector under this contract at no charge to the customer.

- C.1.18.** If the OSBI's equipment has firefighter's service, we assume responsibility for performing and keeping a record of any Code required test and for the maintenance and functioning of the smoke and/or heat detectors.
- C.1.19.** If during the initial firefighters' service test any elevator firefighters' service is found to be inoperable, the OSBI will be responsible for all of the cost associated with the repairs necessary to bring the unit in compliance with the applicable Codes.
- C.1.20.** The successful bidder will instruct their personnel to use appropriate personal protection equipment and follow safe work practices.
- C.1.21.** The successful bidder will endeavor to reduce generation of waste materials, minimize risks to the environment, the OSBI, the general public and the successful bidder's employees.
- C.1.22.** The successful bidder shall comply with all federal and state environmental laws and regulations. Safety Data Sheets or manuals will be made available for review at the OSBI's request.
- C.1.23.** The OSBI assumes responsibility for removal of wastes, including but not limited to hydraulic oil, spoils, asbestos, etc., as it is not part of this contract.
- C.1.24.** The OSBI agrees to engage a qualified electrician to service, at least annually, the elevator mainline disconnects located in the elevator equipment room.
- C.1.25.** All maintenance procedures and repairs will be performed during the OSBI's regular working hours of our regular working days for examiners who perform the service
- C.1.26.** All lamp and signal replacements will be performed during regular examinations.
- C.1.27.** For purposes of this contract, a callback is a response by the successful bidder to a request for service or assistance made by (a) the OSBI or designee, (b) the building representative or designee, (c) emergency personnel, (d) through the ADA phone line and/or (e) through the REM® monitoring system for service or assistance on an as-needed basis, excluding regularly scheduled maintenance.

C1.28. OSBI FSC Regular working hours: 0800 hours to 1700 hrs

C.1.29. OSBI FSC Regular working days: Monday through Friday (excluding holidays)

C.1.30. Callbacks outside of regular working hours will be billed at standard overtime rates.

C.1.31. The OSBI will provide the successful bidder wiring diagrams reflecting all previously made changes for the unit covered by this contract to facilitate proper maintenance of the equipment. The successful bidder shall maintain the wiring diagrams so that they properly reflect any changes made by the successful bidder to the equipment. These diagrams remain the property of the OSBI.

C.1.32. Any counters, meters, tools, remote monitoring devices or communications devices which the successful bidder may use or install under this contract remains their property, solely for the use by their employees. Such service equipment is not considered part of the unit. The OSBI will grant the successful bidder the right to store or install such service equipment in our building and to electrically connect it to the unit.

C.1.33. The OSBI will restrict access to the service equipment to authorized service personnel. The OSBI will not permit other entities to use, access, examine, copy or disclose or disassemble the service equipment or the resident software in the service equipment for any purpose whatsoever.

C.1.34. If the contract is terminated for any reason, the successful bidder will be given access to our premises to remove the service equipment, including the resident software, at the successful bidder's expense.

C.1.35. ANY DEVICES THAT CONTINUALLY MONITOR THE SAFETY ASPECTS IN THE DAILY OPERATION OF THE UNIT ARE CONSIDERED AN INTEGRAL PART OF THE ELEVATOR AND SHALL NOT BE REMOVED.

C.1.36. The OSBI is responsible to secure the successful bidder's right to use any special service tools/keys required to maintain our non-Otis equipment. The OSBI owned tools will be provided to the successful bidder prior to the start of the maintenance on such equipment.

C.1.37. It is agreed that the successful bidder does not assume possession or control of the unit, that the unit will remain solely the possession of the OSBI as owner and operator, lessee, or agent of the owner or lessee, and that the OSBI is solely responsible for all requirements imposed by any federal, state, or local law, Code, ordinance or regulation.

C.1.38. This contract will not cover expendables or consumables (including, but not limited to wall panels, door panels, car gates, plenum chambers, hung ceilings, lighting, light diffusers, light tubes and bulbs, handrails, mirrors and floor coverings), rail alignment, hoistway enclosures, hoistway gates, hoistway inserts and brackets, mainline disconnect switches, door, door frames, sills, swing door hinges and closing devices, below ground or unexposed hydraulic cylinders and plungers, buried or unexposed piping.

- C.1.39.** Without affecting the successful bidder's obligation to provide service under this contract, the OSBI agrees to permit the successful bidder to train their personnel on the unit.
- C.1.40.** This contract does not cover computer and microcomputer devices, such as terminal keyboards and display units that are not exclusively dedicated to the elevator system.
- C.1.41.** This contract does not cover telephones installed by outside entities, intercoms, heat sensors, smoke sensors, communications equipment, or safety signaling equipment, or instructions or warnings in connection with use by passengers.
- C.1.42.** The successful bidder will not be required: (a) to make any tests other than those specifically set forth herein; (b) to make any replacements with parts of a different design or type; (c) to make any changes in the existing design of the unit; (d) to alter, update, modernize or install new attachments to any unit, whether or not recommended or directed by insurance companies or by governmental authorities; (e) to make repairs or replacements necessitated by failures detected during or due to testing of the unit or buried or unexposed hydraulic cylinders or piping and (f) to make any replacements, renewals, or repairs necessitated by any obsolete or discontinued part of the unit or by reason of any cause beyond the successful bidder's (except ordinary wear and tear) including, but not limited to fire, explosion, theft, floods, water, weather, earthquake, vandalism, misuse, abuse, mischief or repair by others.
- C.1.43.** The OSBI assumes responsibility for the cost of correcting all elevator Code violations existing on the entry date of this contract. If such Code violations or other outstanding safety violations are not corrected in accordance with this contract, the successful bidder may with respect to the equipment not meeting Code requirements cancel this contract without penalty by providing thirty (30) days written notice.
- C.1.44.** The OSBI agrees to provide the successful bidder unrestricted ready and safe access to all areas of the building in which any part of the unit is located, to keep all machine rooms and pit areas free from water, stored materials and debris, to provide a safe work place for the successful bidder's personnel, to remove and remediate any waste or hazardous materials in accordance with applicable laws and regulations, and to provide a grounded, 3-prong electrical system and proper lighting in the machine rooms and pits. The successful bidder shall not be obliged to perform until such unsafe condition has been remedied.
- C.1.45.** If any unit is malfunctioning or in a dangerous condition, the OSBI agrees to notify the successful bidder as soon as possible using the 24-hour service number. Until the problem is corrected, the OSBI agrees to remove the unit from service and take all necessary precautions to prevent access or use.

- C.1.46.** The OSBI will provide the successful bidder with written notice within twenty-four hours after occurrence of any accident in or about the elevator to the successful bidder if required by law, to any local authorities.
- C.1.47.** The OSBI agrees to properly post, maintain, and preserve any and all instructions or warnings to passengers in connection with the use of a unit.
- C.1.48.** The OSBI will not allow others to make alterations, additions, adjustments, or repairs to the equipment.
- C.1.49.** During the term of this contract, the successful bidder will install controller software upgrades developed and released for general distribution since the installation of the existing controller hardware.
- C.1.50.** The OSBI will furnish to the successful bidder at the OSBI's expense, one (1) outside telephone line to the elevator machine room that allows data calls to and from a toll-free number. The telephone line may be a separate line dedicated to the maintenance equipment or may be an existing line that is shared between another telephone and the maintenance equipment.
- C.1.51.** The successful bidder shall insure that all risk insurance upon the full value of the work and material delivered to the job site is maintained at no cost to the OSBI. If either party so requires, in writing, the other party shall furnish certificates of insurance evidencing the above insurance coverage.
- C.1.52.** This contract shall begin on January 1st, 2014 and will expire on December 31th, 2014. The OSBI shall have the option to renew this contract for four (4) additional 12-month terms under the same terms and conditions.

D. EVALUATION

See Section A.14.

E. INSTRUCTIONS TO SUPPLIER

E.1. Response

Bidder must complete and return the Bidder Response Form (Pages 20 & 21) to include a minimum of three (3) references of businesses that the Bidder has provided similar in size and scope or function within the past two (2) years. Please do not use OSBI personnel as a reference.

E.2. Mandatory Site Visit

A MANDATORY SITE VISIT IS SCHEDULED FOR DECEMBER 6th, 2013 AT 10:00 A.M. NO OTHER SITE INSPECTIONS WILL BE SCHEDULED OR CONDUCTED. ONLY SUPPLIERS WHO ATTEND THIS MANDATORY SITE VISIT WILL BE ALLOWED TO BID ON THESE SERVICES.

E.3. Bid Submission

E.3.1. Bidder must complete and return Bidder Response Form (Pages 20 & 21).

- E.3.2.** Bidder must submit Responding Bidder Information form, fully executed and signed. (Page 2 of OMES-Form-CP-076SA). It must be completed and signed, in ink, by a company representative authorized to enter into a contractual agreement on behalf of that company and the original returned with the bidder's response.
- E.3.3.** Bidder must submit Non-Collusion Certification form, fully executed and signed. (Page 3 of OMES-Form CP-004SA). It must be completed and signed, in ink, by a company representative authorized to enter into a contractual agreement on behalf of that company.
- E.3.4.** Bid response (along with required submittals stipulated within this ITB) shall consist of one original, signed and notarized. Bidders are expected to carefully examine this solicitation, all instructions, and any amendment(s) (if applicable). Failure to do so may cause the bid to be rejected.
- E.3.5.** Deviations and exceptions from terms and conditions or specifications shall be described fully on the bidder's letterhead. In the absence of such statement, the bid shall be accepted in strict compliance with all terms, conditions and specifications. The OSBI reserves the right to reject any deviations and exceptions from terms and conditions or specifications submitted by the bidder.

E.4. Response Material Ownership

All material submitted regarding this ITB becomes property of the State of Oklahoma.

E.5. Incurring Costs

The OSBI shall not be obligated or be liable for any cost incurred by bidder prior to issuance of a contract. All cost to prepare and submit a response to this solicitation shall be borne by the bidder.

E.6. Clarification Questions

- E.6.1.** Clarification of the contents of this ITB may be requested in writing via E-Mail to OSBI Contracting & Acquisitions Agent; Nancy McFarland at nancy.mcfarland@osbi.ok.gov
- E.6.2.** Clarification requests must be clearly marked with the ITB number and received not later than five (5) working days prior to Response Due Date. Bidder's questions, submitted in writing, will be responded to in the form of an amendment or addendum, and will be distributed to all suppliers. PLEASE NOTE: All amendments must be signed and returned with the vendors bid response.

F. CHECKLIST

F.1. Responding Bidder Information Form (Page 2 of OMES-Form-CP-076SA).

F.2. Non-Collusion Certification Form (Page 3 of OMES-Form CP-004SA).

F.3. Bidder Response Form (Pages 20 & 21)

F.4. Envelope – Insert the name and address of the bidder in the upper left corner of the single envelope, package or container. ITB Number must appear on the face of the single envelope.

F.5. Initial in ink, each alteration

F.6. All amendments signed (if applicable)

G. OTHER - NONE

H. PRICE AND COST

H.1. See Bidder Response Form (Pages 20 & 21)

Oklahoma State Bureau of Investigation
Forensic Science Center facility
Elevator Maintenance Services

BIDDER RESPONSE FORM

Solicitation Number: 3080000307

Due Date: December 16, 2013 by 3:00 P.M.

Company Name: _____

Address: _____

Contact Person: _____

Phone Number: () _____

References: Provide three (3) references of businesses that you have provided services similar in size and scope or function within the past two (2) years.

1. Business

Name: _____

Address: _____

Contact Person: _____

Phone Number: () _____

Time Period Services

Provided: _____

2. Business

Name: _____

Address: _____

Contact Person: _____

Phone Number: () _____

Time Period Services

Provided: _____

3. Business

Name: _____

Address: _____

Contact Person: _____

Phone Number: () _____

Time Period Services

Provided: _____

Elevator Maintenance Yearly Rate

January 1st, 2014 through June 30, 2014
\$ _____

July 1st, 2014 through June 30, 2015
\$ _____

July 1st, 2015 through June 30, 2016
\$ _____

July 1st, 2016 through June 30, 2017
\$ _____

Signature: _____

Owner or Owner's Authorized Representative

Name/Title: _____

Date: _____