



Memorandum From the WCPSS Purchasing Department
Letter of Instruction for RFP #251-25-57 M-O JOC/SA

To: Prospective Parties

Thank you for your interest in the Wake County Public School System. Please review the following instructions prior to submitting your proposal.

- **PRE-BID conference: See WCPSS schedule on Page 3 for time and location. Attendance is "URGED & STRONGLY RECOMMENDED".**
- All submittals must be organized and indexed according to the section number and required subject matter. The information contained in your submittal should be indexed and easily accessed by WCPSS. WCPSS is not required to seek clarification on any proposal that does not meet these minimum requirements.
- Prior to submitting and executing the proposal, please make sure you read and understand the terms and conditions referenced. All proposals are subject to the terms and conditions outlined herein. All responses will be controlled by such terms and conditions and the submission of other terms and conditions, price lists, catalogs, and/or other documents as part of an offeror's response will be waived and have no effect either on this Request For Proposals or on any contract that may be awarded resulting from this solicitation. The attachment of any other terms and conditions by the Offeror may be grounds for rejection of that proposal. Offeror specifically agrees to the conditions set forth in the above paragraph by signature to the proposal. WCPSS's Terms and Conditions cannot be altered or changed. This solicitation may be subject to the use of Federal Funds and therefore Uniform Guidance, Addendum D, may be enforced upon award to contractor (N/A for 2024-25). Please read carefully.
- WCPSS will adhere to strict deadlines as indicated in the solicitation document and thus will not make exceptions to these dates and times.
- Please read carefully the section titled CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING THE RFP PROCESS. All questions should ONLY be directed to Jim Jaeger at: jjaeger@wcpss.net Do not contact the Maintenance & Operations Dept. with questions on this RFP.
- Offerors are cautioned that this is a request for offers, not a request to contract, and WCPSS reserves the unqualified right to reject any and all offers when such rejection is deemed to be in the best interest of WCPSS.
- In submitting a proposal the Offeror agrees not to use the results there from as part of any news release or commercial advertising.
- Vendors **MUST** submit one (1) signed, original executed proposal and (1) electronic copy (Flash/Thumb drive) in response via courier or delivery in a **SEALED package** no later than the due date and time specified. RFP # & Title should be listed on the outer delivery package.
- WCPSS only posts to the following websites: Interactive Purchasing System (NC eVP), <https://evp.nc.gov/>, WCPSS Purchasing website <http://www.wcpss.net/domain/101>, and NC Historically Underutilized Businesses <https://ncadmin.nc.gov/businesses/historically-underutilized-businesses-hub/submit-bid-opportunities-hub>. Please review these sites for all bid information and update addendums throughout the process.
- This RFP opening will be publicly opened (See schedule on Page 3).
- The Maintenance & Operations JOC/SA bids may be divided up into different Due/Opening dates this year. The bidder must pay specific attention to the due date of each RFP they are submitting.
- Due dates and times are **FIRM**. It is the vendor's responsibility to submit RFP(s) by the requested due date/time. WCPSS cautions all bidding vendors using local couriers and overnight couriers to submit early, due to the possible chance for delivery delay. Vendors are welcome to personally drop-off their submissions to the Purchasing Office only, at the address on Page 4. If you wish to receive a delivery receipt for an in-person drop-off, please bring a receipt that we can date stamp and/or we will date stamp the sealed packet and a picture can be taken using the vendor's cell phone.
- By initialing the attached checklist of requirements, contractors are acknowledging and agreeing to terms and conditions as stated and have included the required information and documentation for this solicitation. By responding to this request for proposals all parties are aware that this request is subject to the use of local and or federal funds and requires that special attention be made to the terms and conditions and federal contracting laws as written and presented in this request for proposals. With that being said, WCPSS uses multiple funding sources and this particular service may or may not be subject to federal contracting laws. Contractor should assume it does and if questionable or taking exception should use the question and answer period to request clarification.



**WAKE COUNTY
PUBLIC SCHOOL SYSTEM**

WAKE COUNTY

PUBLIC SCHOOL SYSTEM

PURCHASING DEPARTMENT

Refer ALL Inquiries Via Email to: Jim Jaeger, Buyer

(See page 4 for delivery / mailing instructions)

E-Mail: jjaeger@wcpss.net

REQUEST FOR PROPOSAL NO.:

251-25-57

Sealed Proposals are due: **APRIL 11, 2024 1:00 pm ET**

Bids Opened (Public) starting: **APRIL 11, 2024 1:00 pm ET**

Contract Type: Maint. & Ops. Agency Specific JOC or SA

Service: JOC/SA:

**HVAC
INSTALLATION & REPAIR**

ENERGY & PHYSICAL PLANT - JOC

Using Agency Name: WAKE COUNTY PUBLIC SCHOOL SYSTEM

SEALED BIDS, subject to the conditions made a part hereof, will be received at this office (1551 Rock Quarry Rd. Bldg. F, Raleigh, NC 27610) until 1:00 p.m. ET on the specified due day and then opened, for furnishing and delivering the commodity or service as described herein. Refer to pages 2, 3 and 4 for proper deadline, delivery/ mailing instructions and location addresses.

Bids submitted via facsimile (FAX) machine or Email in response to this Request For Proposal will not be acceptable. All RFP must be delivered or couriered. Bids are subject to rejection unless submitted on this form.

EXECUTION In compliance with this Request For Proposal, and subject to all the conditions herein, the undersigned offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item within the time specified herein. By executing this bid, I certify that this bid is submitted competitively and without collusion. Vendor also certifies complete review of this RFP.

Failure to execute/sign bid prior to submittal shall render bid invalid.

BIDDER:		FEDERAL ID OR SOCIAL SECURITY NO.	
STREET ADDRESS:		P.O. BOX:	ZIP:
CITY & STATE & ZIP:		TELEPHONE NUMBER:	TOLL FREE TEL. NO (800)
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE			
TYPE OR PRINT NAME & TITLE OF PERSON SIGNING:		FAX NUMBER:	
AUTHORIZED SIGNATURE:	DATE:	E-MAIL:	

Offer valid for 45 days from date of bid opening unless otherwise stated here: _____ days Prompt Payment Discount: _____ % _____ days.

RFP SCHEDULE

The table below shows the *intended* schedule for this RFP. WCPSS will make every effort to adhere to this schedule.

Event	Responsibility	Date, Time (ET), Location
Issue RFP	WCPSS	by MARCH 11, 2024 7:00 P.M.
Pre-Bid Meeting <u>VENDOR ATTENDANCE IS STRONGLY URGED AND RECOMMENDED FOR EVERYONE</u>	WCPSS, Vendor	March 21, 2024 9:00 a.m. <u>***NEW*** MEETING LOCATION:</u> 1551 ROCK QUARRY ROAD PURCHASING BUILDING F RALEIGH, NC 27610
Submit All Written Questions via Email to: jjaeger@wcpss.net	Vendor	March 29, 2024 by 10:00 a.m. ET
Provide Response Addendum to Questions Emailed back and "RFP Quiet Period" Begins	WCPSS	by APRIL 02, 2024 5:00 p.m. ET
Submit Proposals Deadline via Delivery or Courier <u>IMPORTANT NOTE:</u> THIS RFP IS REQUIRED TO BE SUBMITTED IN A <u>"SEALED"</u> PACKAGE	Vendor	APRIL 11 2024 1:00 p.m. ET 1551 Rock Quarry Rd. Bldg. F (Purchasing) Raleigh NC 27610
Public Opening of Proposals	WCPSS, Vendor	APRIL 11, 2024 1:00 p.m. ET 1551 Rock Quarry Rd. Bldg. F (Purchasing) Raleigh NC 27610

PROPOSAL QUESTIONS

Upon review of the RFP documents, Vendors may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the Proposal Questions process, Vendors shall submit any such questions by the above due date. Written questions only shall be emailed to jjaeger@wcpss.net at date and time specified above. Vendors should enter "RFP #251-25- bid ## Questions" as the subject for the email. Questions submittals should include a reference to the applicable RFP section and be submitted in a format shown below:

RFP References	Vendor Question
RFP Number, Section, Page Number	List Vendor question(s)
RFP251-25- ## (RFP Title)	

Questions received prior to the submission deadline date, WCPSS' response, and any additional terms deemed necessary by WCPSS will be posted in the form of an addendum to the NC Interactive Purchasing System (eVP), <https://evp.nc.gov> and WCPSS Purchasing website <http://www.wcpss.net/domain/101> and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any WCPSS personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Vendors shall rely only on written material contained in an Addendum to this RFP.

PROPOSAL SUBMITTAL (MUST BE SEALED & DELIVERED):

Sealed proposals, subject to the conditions made a part hereof and the receipt requirements described below, shall be received at the address indicated in the table below, for furnishing and delivering those items or services as described herein.

Mailing/Delivery Address for Sealed Proposal:

PROPOSAL NUMBER: 251-25-57
Wake County Public Schools
Attn: Jim Jaeger, Buyer
1551 Rock Quarry Road
Purchasing Dept. Bldg. F
Raleigh, NC 27610

IMPORTANT NOTE: All proposals shall be physically delivered to the office address listed above. Sealed proposals, subject to the conditions made a part hereof, will be received at the address indicated in the table in this Section, for furnishing and delivering the commodity or service as described herein.

a) **MUST** submit **ONE (1) SIGNED, ORIGINAL EXECUTED PROPOSAL** response **and ONE (1) Electronic Copy (Flash / Thumb drive)**, simultaneously to the address identified in the table above.

b) **Submit your proposal in a sealed package.** **Clearly mark each outer package with: (1) Vendor name; (2) the RFP Number and Title; (3) the due date; and (4) Buyer's Name.** **Address the package(s) for delivery as shown in the table above.**

Important Note: If Vendor is submitting more than one (1) proposal, each proposal shall be submitted in **separate sealed envelopes and clearly marked accordingly for each RFP.**

For delivery purposes, separate sealed envelopes from a single Vendor may be included in the same outer package. **Proposals may be subject to rejection unless submitted with the information above included on the outside of the sealed proposal package.**

TRANSPORTATION CHARGES: "FOB Raleigh, North Carolina with all transportation charges prepaid and included in the bid price."

DEVIATIONS: Any deviations from specifications and requirements herein must be clearly pointed out by bidder. Otherwise it will be considered that equipment offered is in strict compliance with these specifications and requirements, and successful bidder will be held responsible therefor. Deviations must be explained in detail below or on an attached sheet. However, no implication is made by Wake County Public School System that deviations will be acceptable. Bidder is advised that the response (or lack thereof) on this question does not take precedence over specific responses or non-responses provided elsewhere in this bid.

FIRM BID: Prices and any other entry made hereon by the bidder shall be considered firm and not subject to change or withdrawal.

METHOD OF AWARD: All qualified proposals will be evaluated and awards will be made to the Vendor(s) meeting the RFP requirements and achieving the highest and best final evaluation which is best for WCPSS. Vendors SHALL not be considered who are not approved or authorized by The State of North Carolina to do business with The State of North Carolina. WCPSS reserves the right to waive any minor informality or technicality in proposals received.

IMPORTANT: CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

During the evaluation period—from the date proposals are opened through the date the contract is awarded—each Vendor submitting a proposal (including its representatives, sub-contractors and/or suppliers) is prohibited from having any communications with any person inside or outside of WCPSS regarding this solicitation. All communication should be directed in written form to the WCPSS contact indicated on pages 1 and 2.

- Please review and adhere to RFP schedule that is listed on page 3.
- Any and all WCPSS communications will be made thru the following: Email (from bidding vendor) and WCPSS responses via addendums posted to eVP / WCPSS websites.
- All questions for RFP's are due "in writing via email" no later than: *** refer to schedule on RFP page 3.
- No telephone calls will be accepted or answered. Any inquiries/questions must be emailed to: jjaege@wcpss.net
- All answers to emailed RFP questions will ONLY be posted to: WCPSS and eVP websites as an addendum. (No addendums will be emailed individually to vendors proposing the questions)
- The RFP "Quiet Period" begins after the answers are posted and no new questions will be accepted or answered. (Unless there is an RFP critical omission that directly affects the bid).
- This RFP must be "delivered" as a SEALED BID. Note: No emailed or faxed RFP's will be accepted. Refer to delivery instructions on page 4.
- A submitted RFP should contain one (1) original fully executed document and (1) electronic copy in the form of a flash / thumb drive.
- An acceptable RFP should be executed in all areas requested. Submissions should include, but not limited to: RFP Execution page 2, References page, HUB forms pages, checklist and all Service Agreement or Job Order Contract Schedule A proposal documents/bid sheets. The submitted RFP does not need to have the general information, such as the Terms & Conditions and other informational or sample pages sent back.
- By the execution of the RFP page 2, the vendor does certify that the entire RFP has been reviewed, understood and agrees to the terms. If RFP page 2 is not completed, executed and returned, the submission shall be rendered invalid.
- Important Note: All Terms and Conditions of WCPSS RFP's cannot be altered, changed or added to. Additional vendor terms and conditions will not be accepted and a vendor's submission may be disqualified, if the submitted RFP is altered.
- The Pre-Bid meeting is strongly urged for all bidding vendors. Refer to schedule and location on RFP page 3. *There is a location change for this meeting*. To be held at WCPSS Purchasing Building F. *** Refer to the RFP schedule on Page 3 ***.
- RFP submissions will be accepted only at the Purchasing Department (Building F) until RFP due date specified on RFP pages 2 and 3.
- Public Opening will begin after RFP due date/time. (refer to schedule and location on RFP pages 2 and 3).
- After RFP opening, all submissions will go into departmental review, prior to award. Please note that this process takes time and due diligence. Results requests (Bid Tabs) from bidding vendors only, can be submitted to the buyer at: jjaege@wcpss.net. Bidding vendors can immediately request the bid opening results that were read at the bid opening. Final bid tab requests will be kept on file and responded to, after award is made and contract/agreement is executed. Awards are not considered final until contracts are completed and a purchase order is issued for that contract in July.
- During the entire bid process, the vendor is required to observe the RFP's "Confidentiality and Prohibited Communications" requirements (Page 5). The only initial vendor communication should be with the WCPSS the buyer of record. The WCPSS M&O dept. will contact the vendor to begin the contract process if an award is requested.

Definitions

The proposing firm will be referred to throughout this document as **VENDOR**.

The scope of work defined in this Request for Proposal (RFP) shall be referred to as the **PROJECT**. Deliverables shall include a pricing information, experience and methodology for commercial moves pertaining to public school environments.

The Wake County Public School System (WCPSS) is the nation's sixteenth largest school district and the largest in the state of North Carolina. With 112 elementary schools, 38 middle schools, 28 high schools and 5 special schools, we serve over 160,000 students.

Minimum Requirements

Vendor must complete all required attachments. Additional information may be included that effect the total cost to WCPSS.

It shall be mandatory that the selected vendor enforce the following employee requirements:

- a) All employees are subject to the required background checks as described in the terms and conditions section of the solicitation.
- b) Vendor must disclose third party contractors

Qualifications

THE VENDOR shall be licensed and approved to do business in the State of North Carolina.

Provide any copies of licenses, certifications or other documentation that is required by this RFP. Experience in performing the required duties will be accepted. Please provide references (page 11) other than WCPSS.

Insurance requirements referenced within as well as any Federal, State and Local requirements shall be required and maintained

Present sufficient qualified personnel to carry out the project in a timely fashion.

Please include staffing information.

Demonstrated experience in performing similar projects.

Experience with the service and material supply referenced in this RFQ/P.

Vendor will be disqualified for consideration if they are listed on either the State of North Carolina debarred vendor registry or the Federal Government debarred vendor registry. (Federal Government)

<https://www.sam.gov/SAM/pages/public/searchRecords/searchResults.jsf>

(State of North Carolina) <https://ncadmin.nc.gov/documents/nc-debarred-vendors>

Proposal Evaluation

All proposals will be evaluated by representatives of WCPSS. WCPSS may, at its sole discretion, ask for additional information and/or elect to conduct interviews with finalists to clarify information provided in the proposals.

The services that are the subject of this RFQ/P are not required to be bid under North Carolina law, and none of the statutory requirements regarding public bidding apply to this RFQ/P. This document, and not those statutes, will govern the selection process.

WCPSS shall not be required to award the contract to the lowest proposed compensation; nor shall WCPSS have any obligation to explain its decision to recommend or not to recommend any particular vendor or to invite or exclude any particular vendor from consideration at any stage of the process. Instead of recommending that contracts be awarded to one or more vendors who presented proposals, WCPSS may, at its sole discretion, reject the proposals and repeat the process, enter into direct contract negotiations with one or more vendors (possibly including vendors who have not previously submitted proposals) or take any other action WCPSS deems advisable under all the circumstances.

WCPSS is expected to make any final selection(s) based upon any factors or considerations WCPSS deems relevant. Factors often considered include qualifications, relevant experience, fee, and ability to perform work in a timely manner. WCPSS retains sole discretion to award the contract to the vendor(s) it believes will best serve the interests of WCPSS and may consider any factors, documents, or information it deems relevant in making that determination. WCPSS shall not have any obligation to explain its decision to select or not select any individual vendors or to invite or exclude any individual vendors from consideration at any stage of the process. The decision of WCPSS to accept or reject any proposals and to award contract(s) to any one or more vendor(s) shall be final and not subject to further review.

Vendors are subject to *immediate disqualification* at any stage of the selection process for any of the following:

- **The submission of false or misleading information in the vendor's proposal.**
- **Any efforts to dissuade or discourage other vendors from submitting proposals.**
- **Any efforts to influence, dictate, or change the terms of another vendor's proposal.**
- **Any form of bid collusion or bid rigging.**

TERMS AND CONDITIONS

1. **READ, REVIEW AND COMPLY:** It shall be the bidder's responsibility to read this entire document, review all enclosures and attachments, and comply with all requirements specified herein.
2. **NOTICE TO BIDDERS:** All bids are subject to the provisions of special terms and conditions specific to this Invitation for Bids, the specifications. Wake County Public School System (WCPSS) objects to and will not evaluate or consider any additional terms and conditions submitted with a bidder response. This applies to any language appearing in or attached to the document as part of the bidder's response. **DO NOT ATTACH ANY ADDITIONAL TERMS AND CONDITIONS.**
By execution and delivery of this document, the bidder agrees that any additional terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect.
3. **DEFINITIONS:**
 - **BIDDER:** Company, firm, corporation, partnership, individual, etc., submitting a response to an Invitation for Bids.
 - **TERM CONTRACT:** A contract generally intended to cover all normal requirements for a commodity for a specified period of time based on estimated quantities only.
 - **OPEN MARKET CONTRACT:** A contract for the purchase of a commodity not covered by a term contract.
4. **EXECUTION:** Failure to sign under EXECUTION section will render bid invalid.
5. **ORDER OF PRECEDENCE:** In cases of conflict between specific provisions in this bid, the order of precedence shall be (1) special terms and conditions specific to this bid, (2) specifications, and (3) Instructions to Bidders.
6. **TIME FOR CONSIDERATION:** Unless otherwise indicated on the first page of this document, bidder's offer shall be valid for 45 days from the date of bid opening. Preference may be given to bids allowing not less than 45 days for consideration and acceptance.
7. **SPECIFICATIONS:** Any deviation from specifications indicated herein must be clearly pointed out; otherwise, it will be considered that items offered are in strict compliance with these specifications, and bidder will be held responsible, therefore. Deviations shall be explained in detail. **The bidder shall not construe this paragraph as inviting deviation or implying that any deviation will be acceptable.**
8. **INFORMATION AND DESCRIPTIVE LITERATURE:** Bidder is to furnish all information requested and, in the spaces, provided in this document. Further, if required elsewhere in this bid, each bidder must submit with their bid sketches, descriptive literature and/or complete specifications covering the products offered. Reference to literature submitted with a previous bid will not satisfy this provision. Bids which do not comply with these requirements will be subject to rejection.
9. **RECYCLING AND SOURCE REDUCTION:** It is the policy of WCPSS to encourage and promote the purchase of products with recycled content to the extent economically practicable, and to purchase items which are reusable, refillable, repairable, more durable, and less toxic to the extent that the purchase or use is practicable and cost-effective.
We also encourage and promote using minimal packaging and the use of recycled/recyclable products in the packaging of commodities purchased. However, no sacrifice in quality of packaging will be acceptable. The company remains responsible for providing packaging that will protect the commodity and contain it for its intended use.
Companies are strongly urged to bring to the attention of WCPSS which issued the solicitation document, those products or packaging they offer which have recycled content and that are recyclable.
10. **CLARIFICATIONS/INTERPRETATIONS:** Any and all questions regarding this document must be addressed to the purchaser named on the cover sheet of this document. Do not contact the school or department directly. Any and all revisions to this document shall be made only by written addendum from WCPSS Purchasing Department. The bidder is cautioned that the requirements of this bid can be altered only by written addendum and that verbal communications from whatever source are of no effect.
11. **ACCEPTANCE AND REJECTION:** WCPSS reserves the right to reject any and all bids, to waive any informality in bids and, unless otherwise specified by the bidder, to accept any item in the bid. If either a unit price or extended price is obviously in error and the other is obviously correct, the incorrect price will be disregarded.
12. **REFERENCES:** WCPSS reserves the right to require a list of users of the exact item offered. WCPSS may contact these users to determine acceptability of the bid. Such information may be considered in the evaluation of the bid.
13. **AWARD OF CONTRACT:** As directed by statute, qualified bids will be evaluated and acceptance may be made of the lowest and best bid most advantageous to WCPSS as determined upon consideration of such factors as: prices offered; the quality of the articles offered; the general reputation and performance capabilities of the bidders; the substantial conformity with the specifications and other conditions set forth in the bid; the suitability of the articles for the intended use; the related services needed; the date or dates of delivery and performance; and such other factors deemed by WCPSS to be pertinent or peculiar to the purchase in question. Unless otherwise specified by WCPSS or the bidder, WCPSS reserves the right to accept any item or

group of items on a multi-item bid. WCPSS also reserves the right to reject any and all bids. In addition, on TERM CONTRACTS, WCPSS reserves the right to make partial, progressive, or multiple awards: where it is advantageous to award separately by items; or where more than one supplier is needed to provide the contemplated requirements as to quantity, quality, delivery, service, geographical areas; other factors deemed by WCPSS to be pertinent or peculiar to the purchase in question.

14. **HISTORICALLY UNDERUTILIZED BUSINESSES:** Pursuant to General Statute 143-48 and Executive Order #150, WCPSS invites and encourages participation in this procurement process by businesses owned by minorities, women, disabled, disabled business enterprises and non-profit work centers for the blind and severely disabled.
15. **CONFIDENTIAL INFORMATION:** As provided by statute and rule, WCPSS will consider keeping trade secrets which the bidder does not wish disclosed confidential. Each page shall be identified in boldface at the top and bottom as "CONFIDENTIAL" by the bidder. Cost information shall not be deemed confidential. In spite of what is labeled as a trade secret, the determination whether it is or not will be determined by North Carolina law.
16. **SAMPLES:** Sample of items, when required, must be furnished as stipulated herein, free of expense, and if not destroyed will, upon request be returned at the bidder's expense. Request for the return of samples must be made within 10 days following date of bid opening. Otherwise, the samples will become WCPSS property. Each individual sample must be labeled with the bidder's name, bid number, and item number. A sample on which an award is made, will be retained until the contract is completed, and then returned, if requested, as specified above.
17. **AWARD PROCEDURES:** Contract award notice shall be posted on WCPSS website. Contract award notices are sent **only** to those actually awarded contracts, and not to every person or firm responding to this solicitation.
18. **RECIPROCAL PREFERENCE:** G.S. 143-59 establishes a reciprocal preference law to discourage other states from applying in-state preferences against North Carolina's resident bidders. The "Principal Place of Business" is defined as the principal place from which the trade or business of the bidder is directed or managed.
19. **DEFAULT AND PERFORMANCE BOND:** In case of default by the contractor, WCPSS may procure the articles or services from other sources and hold the contractor responsible for any excess cost occasioned thereby. WCPSS reserves the right to require performance bond or other acceptable alternative guarantees from successful bidder without expense to WCPSS.
20. **GOVERNMENTAL RESTRICTIONS:** In the event any Governmental restrictions are imposed which necessitate alteration of the material, quality, workmanship, or performance of the items offered prior to their delivery, it shall be the responsibility of the contractor to notify in writing WCPSS, indicating the specific regulation which required such alterations. WCPSS reserves the right to accept any such alterations, including any price adjustments occasioned thereby, or to cancel the contract.
21. **TAXES:** Any applicable taxes shall be invoiced as a separate item.
G.S. 143-59.1 bars the WCPSS from entering into contracts with vendors if the vendor or its affiliates meet one of the conditions of G. S. 105-164.8(b) and refuse to collect use tax on sales of tangible personal property to purchasers in North Carolina. Conditions under G. S. 105-164.8(b) include: (1) Maintenance of a retail establishment or office, (2) Presence of representatives in the State that solicit sales or transact business on behalf of the vendor and (3) Systematic exploitation of the market by media-assisted, media-facilitated, or media-solicited means. By execution of the bid document the vendor certifies that it and all of its affiliates (if it has affiliates) collect(s) the appropriate taxes.
22. **SITUS:** The place of this contract, its situs and forum, shall be Wake County, North Carolina, where all matters, whether sounding in contract or tort, relating to its validity, construction, interpretation, and enforcement shall be determined.
23. **GOVERNING LAWS:** This contract is made under and shall be governed and construed in accordance with the laws of the State of North Carolina.
24. **INSPECTION AT CONTRACTOR'S SITE:** WCPSS reserves the right to inspect, at a reasonable time, the equipment/item, plant or other facilities of a prospective contractor prior to contract award, and during the contract term as necessary for WCPSS determination that such equipment/item, plant or other facilities conform with the specifications/requirements and are adequate and suitable for the proper and effective performance of the contract.
25. **PAYMENT TERMS:** Payment terms are Net not later than 30 days after receipt of correct invoice or acceptance of goods, whichever is later. Payment may be made by procurement card, and it shall be accepted by the contractor for payment if the contractor accepts that card (Visa, MasterCard, etc.) from other customers.
26. **CONDITION AND PACKAGING:** Unless otherwise provided by special terms and conditions or specifications, it is understood and agreed that any item offered or shipped has not been sold or used for any purpose and shall be in first class condition. All containers/packaging shall be suitable for handling, storage, or shipment.
27. **STANDARDS:** All manufactured items and/or fabricated assemblies subject to operation under pressure, operation by connection to an electric source, or operation involving a connection to a manufactured, natural, or LP gas source shall be constructed and approved in a manner acceptable to the appropriate state inspector which customarily requires the label or re-examination listing or identification marking of the appropriate safety standard organization; such as the American Society of Mechanical Engineers for

pressure vessels; the Underwriters Laboratories and /or National Electrical Manufacturers' Association for electrically operated assemblies; or the American Gas Association for gas operated assemblies, where such approvals of listings have been established for the type of device offered and furnished. Further, all items furnished shall meet all requirements of the Occupational Safety and Health Act (OSHA), and state and federal requirements relating to clean air and water pollution.

28. **PATENT:** The contractor shall hold and save WCPSS, its officers, agents, and employees, harmless from liability of any kind, including costs and expenses, on account of any confidential information, copyrighted material, patented or unpatented invention, articles, device or appliance manufactured or used in the performance of this contract, including use by WCPSS or disclosure of any information pursuant to the NC Public Records Act.

29. **ASSIGNMENT:** No assignment of the contractor's obligations nor the contractor's right to receive payment hereunder shall be permitted. However, upon written request approved by the purchasing department and solely as a convenience to the contractor, WCPSS may:

a. Forward the contractor's payment check directly to any person or entity designated by the contractor, and

b. Include any person or entity designated by contractor as a joint payee on the contractor's payment check.

In no event shall such approval and action obligate WCPSS to anyone other than the contractor and the contractor shall remain responsible for fulfillment of all contract obligations.

30. **INSURANCE:**

a. **Commercial General Liability:** The Vendor shall procure insurance coverage for direct operations, contractual liability and completed operations with limits not less than those stated below:

Occurrence:

General Aggregate	\$2,000,000
Premises Operations	\$1,000,000
Personal & Advertising Injury	\$1,000,000
Medical Expense (any one person)	\$5,000

b. **Comprehensive Automobile Liability Insurance**, including coverage for owned, hired, and non-owned vehicles: A Combined Single Limit for bodily injury and property damage limit of not less than \$2,000,000; and \$2,000 medical payments.

c. **Worker's Compensation** including Occupational Disease and Employer's Liability Insurance.

Part A: Worker's Compensation Coverage – Statutory Limits as required by state of North Carolina Worker's Compensation laws.

Part B: Employer's Liability:

Bodily Injury by Accident: \$500,000 each accident

Bodily Injury by Disease: \$500,000 each employee

Bodily Injury by Disease: \$500,000 Policy Limit

d. **Professional Liability Insurance (PL)/Errors and Omissions (E&O)** – Required for any services involving professional services such as architectural and or engineering services. May include malpractice insurance if medical or mental health services are provided. Minimum Limit requirements \$1,000,000

e. **Sexual Misconduct Insurance (SML)/Sexual Abuse/Molestation** - Required for any provider services when alone with students. Covers allegations of sexual abuse by policyholder and those employed by them, whether founded or unfounded. Minimum Limit requirements 1,000,000.

f. **Cyber Liability:** Required for any activity involving personal identifiable information or software applications. Minimum Limit requirements \$1,000,000 up to \$5,000,000.

g. Other types of appropriate insurance may be required depending upon scope of services provided. Examples are aviation liability, pollution liability, crime, employee dishonesty/directors and officers.

h. **Certificates of Insurance** acceptable to WCPSS shall be filed with WCPSS prior to commencement of the Work. These Certificates shall contain a provision that coverage afforded under the policies will not be canceled until at least thirty (30) days' prior written notice has been given to WCPSS, and that the Wake County Board of Education is listed as additional insured on general liability and automobile liability.

The successful vendor agrees to hold harmless and indemnify the Wake County Board of Education (WCBOE) for any liability that may arise from the negligent or illegal acts of the vendor's employees or agents.

31. **GENERAL INDEMNITY:** The provider shall hold and save WCPSS, its officers, agents, and employees, harmless from liability of any kind, including all claims and losses, accruing or resulting to any other person, firm, or corporation furnishing or supplying work, services, materials, or supplies in connection with the performance of this contract, and from any and all claims and losses accruing or resulting to any person, firm, or corporation that may be injured or damaged by the provider in the performance of this contract and that are attributable to the negligence or intentionally tortious acts of the provider. The provider represents and warrants that it shall make no claim of any kind or nature against WCPSS agents who are involved in the delivery or processing of contractor goods to WCPSS. The representation and warranty in the preceding sentence shall survive the termination or expiration of this contract.
32. **CANCELLATION (TERM CONTRACTS ONLY):** All contract obligations shall prevail for at least 180 days after the effective date of the contract. After that period, in addition to the provisions of the paragraph entitled Price Adjustments, for the protection of both parties, this contract may be canceled in whole or in part by either party by giving 30 days prior notice in writing to the other party.
33. **QUANTITIES (TERM CONTRACTS ONLY):** The award of a term contract neither implies nor guarantees any minimum or maximum purchases there under.
34. **PRICE ADJUSTMENTS (TERM CONTRACTS ONLY):** Any price changes, downward or upward, which might be permitted during the contract period must be general, either by reason of market change or on the part of the contractor to other customers.
 - a. **Notification:** Must be given to WCPSS, in writing, concerning any proposed price adjustments. Such notification shall be accompanied by copy of manufacturer's official notice or other acceptable evidence that the change is general in nature.
 - b. **Decreases:** WCPSS shall receive full proportionate benefit immediately at any time during the contract period.
Increases: All prices shall be firm against any increase for 180 days from the effective date of the contract. After this period, a request for increase may be submitted with WCPSS reserving the right to accept or reject the increase or cancel the contract. Such action by WCPSS shall occur not later than 15 days after the receipt by WCPSS of a properly documented request for price increase. Any increases accepted shall become effective not later than 30 days after the expiration of the original 15 days reserved to evaluate the request for increase.
35. **Invoices:** It is understood and agreed that orders will be shipped at the established contract prices in effect on dates orders are placed. Invoicing at variance with this provision will subject the contract to cancellation. Applicable North Carolina sales tax shall be invoiced as a separate item.
36. **LUNSFORD ACT/CRIMINAL BACKGROUND CHECKS:** The Provider shall conduct at its own expense sexual offender registry checks on each of its employees, agents, ownership personnel, or contractors ("contractual personnel") who will engage in any service on or delivery of goods to school system property or at a school-system sponsored event. The checks shall include at a minimum check of the State Sex Offender and Public Protection Registration Program, the State Sexually Violent Predator Registration Program, and the National Sex Offender Registry ("the Registries"). For the Provider's convenience only, all of the required registry checks may be completed at no cost by accessing the North Carolina Sex Offender Registry website at <http://sexoffender.ncdoj.gov/>. The Provider shall provide certification on Sexual Offender Registry Check Certification Form that the registry checks were conducted on each of its contractual personnel providing services or delivering goods under this Agreement prior to the commencement of such services or the delivery of such goods. The Provider shall conduct a current initial check of the registries (a check done more than 30 days prior to the date of this Agreement shall not satisfy this contractual obligation). In addition, Provider agrees to conduct the registry checks and provide a supplemental certification form before any additional contractual personnel are used to deliver goods or provide services pursuant to this Agreement. Provider further agrees to conduct annual registry checks of all contractual personnel and provide annual certifications at each anniversary date of this Agreement. Provider shall not assign any individual to deliver goods or provide services pursuant to this Agreement if said individual appears on any of the listed registries. Provider agrees that it will maintain all records and documents necessary to demonstrate that it has conducted a thorough check of the registries as to each contractual personnel and agrees to provide such records and documents to the school system upon request. Provider specifically acknowledges that the school system retains the right to audit these records to ensure compliance with this section at any time in the school system's sole discretion. Failure to comply with the terms of this provision shall be grounds for immediate termination of the Agreement. In addition, the school system may conduct additional criminal records checks at Provider's expense. If the school system exercises this right to conduct additional criminal records checks, Provider agrees to provide within seven (7) days of request the full name, date of birth, state of residency for the past ten years, and any additional information requested by the school system for all contractual personnel who may deliver goods or perform services under this Agreement. Provider further agrees that it has an ongoing obligation to provide the school system with the name of any new contractual personnel who may deliver goods or provide services under the Agreement. WCPSS reserves the right to prohibit any contractual personnel of Provider from delivering goods or providing services under this Agreement if WCPSS determines, in its sole discretion, that such contractual personnel may pose a threat to the safety or well-being of students, school personnel or others.

37. **ACCESS TO PERSONS AND RECORDS:** The State Auditor and the WCPSS internal auditors shall have access to persons and records as a result of all contracts or grants entered into by WCPSS in accordance with General Statute 147-64.7 and Session Law 2010-194, Section 21 (i.e., the State Auditors and WCPSS may audit the records of the contractor during the term of the contract to verify accounts and data affecting fees or performance).
38. **COMPLIANCE WITH E-VERIFY:** Provider shall comply with all applicable laws and regulations in providing services under this Contract. In particular, Provider shall not employ any individuals to provide services to the School System who are not authorized by federal law to work in the United States. Provider represents and warrants that it is aware of and in compliance with the Immigration Reform and Control Act and North Carolina law (Article 2 of Chapter 64 of the North Carolina General Statutes) requiring use of the E-Verify system for employers who employ twenty-five (25) or more employees and that it is and will remain in compliance with these laws at all times while providing services pursuant to this Contract. Provider shall also ensure that any of its subcontractors (of any tier) will remain in compliance with these laws at all times while providing subcontracted services in connection with this Contract.
39. **COMPLIANCE WITH AFFORDABLE CARE ACT:** Provider is responsible for providing affordable health care coverage to all of its full-time employees providing services to the School System. The definitions of "affordable coverage" and "full-time employee" are governed by the Affordable Care Act and accompanying IRS and Treasury Department regulations.
40. **RESTRICTED COMPANIES LIST:** Bidder represents that as of the date of this bid, Bidder is not included on the Final Divestment List created by the North Carolina State Treasurer pursuant to N.C. Gen. Stat. § 147-86.58. Bidder also represents that as of the date of this bid, Bidder is not included on the list of restricted companies determined to be engaged in a boycott of Israel created by the North Carolina State Treasurer pursuant to N.C. Gen. Stat. § 147-86.81.
41. **BUSINESS AUTHORIZATION:** Bidder is duly qualified to do business in North Carolina. If Bidder is a business entity that is not registered in North Carolina, prior to providing any products or beginning any services described by this bid, Bidder shall either (i) obtain a certificate of authority from the Secretary of State for North Carolina, pursuant to N. C. Gen. Stat. § 55-15-03, or (ii) provide a letter from an attorney indicating that the attorney has reviewed N. C. Gen. Stat. § 55-15-01 and determined that Bidder is not required to obtain a certificate of authority pursuant to N. C. Gen. Stat. § 55-15-01(b).

Rev. 1/2024

Important: Provider is duly qualified to do business in North Carolina. If Provider is a business entity that is not registered in North Carolina, prior to beginning the services described by this Contract, Provider shall either (i) obtain a certificate of authority from the Secretary of State for North Carolina, pursuant to N. C. Gen. Stat. § 55-15-03, or (ii) provide a letter from an attorney indicating that the attorney has reviewed N. C. Gen. Stat. § 55-15-01 and determined that Provider is not required to obtain a certificate of authority pursuant to N. C. Gen. Stat. § 55-15-01(b).

ETHICS AND THE PURCHASING FUNCTION *Policy Code: 6401/9100*

The Wake County Board of Education is committed to conducting the purchasing function in an ethical manner and in compliance with state and federal laws and regulations. The Board expects all employees who are directly or indirectly involved in any aspect of the purchasing function to be aware of and comply with all current state and federal laws and regulations as these standards apply to the school system's purchasing activities. The Board's purchasing goals and principles will not be compromised by individuals motivated by personal gain.

Employees directly or indirectly involved in any aspect of the school system's procurement, purchasing, and/or contracting process for apparatus, materials, equipment, supplies, services, real property, or construction or repair projects, regardless of source of funds, must adhere to the following standards of conduct and those established in any policies regarding employee conflict of interest and 8305: Federal Grant Administration.

1. Employees are expected to make all purchasing-related decisions in a neutral and objective way based on what is in the best interest of the school system and not in consideration of actual or potential personal benefit.
2. Employees shall not participate, directly or indirectly, in making or administering any contract from which they will obtain a direct benefit, unless an exception is allowed pursuant to law.

An employee obtains a direct benefit when the employee or his or her spouse will receive income, commission, or property under the contract, or the employee or spouse has more than a 10 percent interest in an entity that is a party to the contract. See G.S. 14-234 and any policies regarding employee conflict of interest. Participation in making or administering a contract includes, but is not limited to, participating in the development of specifications or contract terms; obtaining or reviewing bids; preparation or award of the contract; and having the authority to make decisions about, interpret, or oversee the contract.

3. Employees shall not participate, directly or indirectly, in the selection, award, or administration of a contract supported in whole or part by a federal grant or award if the employee has a real or apparent conflict of interest. See 2 C.F.R. 200.318 and policy 8305: Federal Grant Administration.

A real or apparent conflict exists when the employee, his or her immediate family member or partner, or an organization which employs or is about to employ any of those individuals, has a financial or other interest in or receives a tangible personal benefit from a firm considered for a contract. For purposes of this subsection, a "financial interest" means a financial interest which comprises more than five percent of the equity of the firm or business or more than five percent of the assets of the economic interest in indebtedness. It does not include an ownership interest held through a fiduciary, such as *Policy Code: 6401/9100* a mutual fund or blind trust, where the individual or individual's employer has no control over the selection of holdings.

4. Employees shall not influence or attempt to influence any person involved in making or administering a contract from which the employee will obtain a direct benefit as described in paragraph 2, above.

5. Employees shall not solicit or receive any gift, favor, reward, service, or promise of reward, including a promise of future employment, in exchange for recommending, influencing, or attempting to influence the award of a contract by the school system.

6. Employees shall notify the superintendent or designee in writing if they have an actual or potential conflict of interest under this policy or applicable state or federal law that would disqualify them from performing any aspect of their job responsibilities.

7. Employees shall not solicit or accept trips, meals, gratuities, gifts, favors, or anything of monetary value from current or recent (within the past year) contractors, subcontractors, or suppliers, or any persons or entities that foreseeably may bid on a contract in the future, unless the item is an unsolicited gift of nominal value (\$50 or less), and is one of the following: an advertising item or souvenir that is widely distributed; an honorarium for participating in a meeting; a meal provided at a banquet; or other item that is clearly permitted by state and federal law. Multiple permitted items from a single contractor may not exceed an aggregate value of \$100 in a twelve-month period.

Employees shall inform existing and potential contractors, subcontractors, and suppliers about these restrictions.

8. Employees shall not solicit or accept any gift from a current or potential provider of E-rate services or products in violation of applicable federal E-rate program gifting rules.

9. Employees shall not divulge confidential information to any unauthorized person. Confidential information includes but is not limited to (1) the school system's cost estimate for any public contract, prior to bidding or completion of other competitive purchasing processes; and (2) the identity of contractors who have obtained proposals for bid purposes for a public contract, until the bids are opened in public and recorded in the Board minutes.

10. An employee shall not misuse information in violation of G.S. 14-234.1. Specifically, an employee shall not, in contemplation of the employee's own official action or that of the Board or others acting on behalf of the school system, or in reliance on information known to the employee in his or her official capacity and not made public, to: a. acquire a financial interest in any property, transaction, or enterprise; b. gain a financial benefit that may be affected by the information or contemplated action; or c. intentionally aid another to acquire a financial interest or gain a financial benefit from the information or contemplated action.

The superintendent or designee shall ensure that all affected personnel are aware of Board policy requirements and applicable laws. Any individual aware of any violation of this policy, policy 2121: Board Member Conflict of Interest, any policies regarding employee conflict of interest, the conflict-of-interest provisions of policy 8305: Federal Grant Administration, or applicable conflict of interest laws shall report such violation in accordance with policy 1760/7280: Prohibition Against Retaliation. Employees who violate this policy, policy 2121, any policies regarding employee conflict of interest, or the conflict-of-interest provisions of policy 8305, will be subject to disciplinary action.

Legal References: 2 C.F.R. 200.318(c); 47 C.F.R. 54.503; FCC Sixth Report and Order 10-175; G.S. 14-234, -234.1; 133-32, -33; Attorney General Opinion requested by L.W. Lamar regarding G.S. 133-32, the Applicability to Attorneys and Law Firms Providing Professional Services to Local Boards of Education, dated May 13, 1993.

The Wake County Public School System reserves the right to reject or disqualify any and all vendors, waive informalities and irregularities in the bid process, and to accept vendors, which are considered to be in the best interest of the School System.

Company Name (include dba): _____

Phone number: _____ Fax: _____ E-mail: _____

Contact: _____

Corporate Office Address: _____

Wake County Office Address (if different from Corporate): _____

Web Address: _____

Length of time in business: _____ Number of permanent employees: _____

DOT # (if applicable): _____ MC License # (if applicable): _____

Insurance Contact: _____ Phone: _____

The Wake County Public School System reserves the right to reject or disqualify any or all vendors, waive informalities and irregularities in the bid process and to accept vendors, which are considered to be in the best interest of the School System.

References: All Vendors: Please provide three (3) references other than WCPSS, for similar size/scope of projects for which comparable services or supplies have been provided.

Name of Organization		Contact Person Name	
Annual Contract Value		Contact Person Title	
Contract Start Date		Contact Telephone#	
Contract End Date		Contact Email Address	

Name of Organization		Contact Person Name	
Annual Contract Value		Contact Person Title	
Contract Start Date		Contact Telephone#	
Contract End Date		Contact Email Address	

Name of Organization		Contact Person Name	
Annual Contract Value		Contact Person Title	
Contract Start Date		Contact Telephone#	
Contract End Date		Contact Email Address	



ADMINISTRATIVE SERVICES

1551 Rock QUARRY ROAD
RALEIGH, NORTH CAROLINA 27610-4145
PHONE: 919.694-8726
EMAIL: PURCHASING@WCPSS.NET

Minority, Women, Small Business Enterprise Information:

Pursuant to WCPSS Board of Education policy and NC General Statutes, WCPSS invites and encourages participation in the procurement process by businesses owned by minorities, women, small business enterprise, disabled business enterprises and non-profit work centers for the blind and severely disabled. Parties are asked to complete the following information:

Check all that apply:

- ☐ Minority Owned Business
- ☐ Woman Owned Business
- ☐ Disabled Owned Business
- ☐ Small Business Enterprise

☐ Yes, I certify that that my company has been certified by the North Carolina Department of Administration (HUB Office) as a Historically Underutilized Business.

☐ No, my company has not yet received HUB or MWBE certification but meets the above criteria.

☐ No, my company is not a minority, woman, disabled owned or small business enterprise.

Bidding Company Name: _____

Date: _____ Signature Authorized Name: _____

Print Authorized Name: _____

IDENTIFICATION OF HISTORICALLY UNDERUTILIZED BUSINESS PARTICIPATION

Bid / Solicitation Number: _____

Bid / Solicitation Description: _____

I, _____,
(Name of Bidder)

Do hereby accept that on this project, we will use the following certified Historically Underutilized Businesses (HUBs) as vendors, suppliers, subcontractors or providers of professional services.

Self-Performing: Check here if bidder will be doing all work with no subcontractors or suppliers: _____

Bidder's HUB Certification Status: HUB Certified? (Circle one) **Yes** **No**

Sub-Contract HUB Firm Name, Address and Phone #	Type of Work	\$ Amount*	HUB Category**

* HUB Certification with the NC HUB Office required to be counted toward state participation goals.

Minority categories: Black / African American (B**), Hispanic (**H**), Asian American (**A**) American Indian (**I**), Female (**F**), Socially and Economically Disadvantaged (**D**), Disabled Business Enterprise (**DBE**), Nonprofit Work Center for the Blind and Severely Disabled (**NPWC**)

Total value of Certified HUB sub-contracting will be (\$)_____.

Total Bid Amount (\$): _____

HUB Participation Percentage:
$$\frac{\text{Total value of Certified HUB sub-contracting}}{\text{Total Bid Amount}} = \text{_____} \%$$

SUBMITTAL CHECK LIST: VENDORS SHOULD INITIAL WHERE APPLICABLE

- Vendors shall provide responses to all questions and complete all attachments for this RFP that require the vendor to provide information.
 - Failure to provide all required items, or vendor's submission of incomplete items, may result in WCPSS rejecting vendor's bid, it shall be WCPSS's sole discretion.
 - Vendors shall submit the following items and shall initial where indicated that the items are included and/or you have read, understand and agree to all terms and conditions as it relates to WCPSS, local, state and federal policy.
- a) Completed and signed version of EXECUTION PAGE 2, along with RFP Purchasing attachment A. Original signatures are required on original copy. Initial: _____
- b) Signed receipt pages of any addenda released in conjunction with this RFP, if required to be returned. Initial: _____
- c) Vendor RFP Response: ONE (1) Original Executed RFP Document included: Initial: _____
ONE (1) Electronic Copy (Flash / Thumb drive) included: Initial: _____
- d) Completed version of EXHIBIT A: Pricing Document(s) Initial: _____
- e) Completed and signed version of Purchasing ATTACHMENTS B & C: HUB SUPPLEMENTAL VENDOR INFORMATION Initial: _____
- f) Copies of any additional licenses, certifications or other designated documentation required by this RFP Initial: _____
- g) Vendor is duly qualified to do business in North Carolina (See Page 9): Initial: _____

Purchasing Attachment D

JOB ORDER CONTRACTS AND SERVICE AGREEMENTS INSTRUCTIONS TO BIDDERS

1. **FORM OF CONTRACT** – A Master Job Order Contract will be established for installation and repair maintenance work at various facilities for WCPSS.

2. DEFINITIONS FOR THE BID FORM

Hourly Rate

Comprised of the contractor's total hourly labor cost inclusive of miscellaneous tools and equipment, vehicle costs, mileage, overhead and profit, insurance, and miscellaneous materials and tools used in the normal installation and repair such as but not limited to: rags and all other expendable items, torch fees, vacuum pumps, pipe benders, small refrigerant reclaim units etc. Items that may be charged over and above hourly rates are parts that are replaced or installed. The Master Job Order Contract rate will be the determining factor(s) in ranking proposals.

Overtime Rate

This rate shall include all factors included on hourly rate on an overtime basis.

Subcontractor rate

The contractor's net profit on subcontracted work shall be no greater than cost plus 5%. All subcontracted work must be approved by the Owner.

Material Overhead & Profit Description

The contractor's net profit shall be no greater than cost plus 10% charged to materials required to complete assigned projects. The contractor must be able to provide documentation showing the cost of materials per the request of WCPSS for any given job. Costs for specialized tools or equipment required to complete an assigned project will be listed and subject to review by the Owner.

Rental Equipment

The contractor's net profit on rental equipment shall be no greater than cost plus 5%. This equipment is considered to be large specialty equipment that the contractor is not expected to have on hand, such as but not limited to: boom trucks, large refrigerant reclaim units, cranes, etc. The contractor must be able to provide documentation showing the cost of the rental equipment at the request of WCPSS for any given job. Costs for rental equipment required to complete an assigned project will be listed and subject to review by the Owner.

Multiple Contracts

It is possible for WCPSS to award Master Job Order Contracts or Service Agreements to multiple bidders (if the amount of anticipated work warrants it) based on the following criteria:

- Quoted rates.
- The Bidder's ability to perform the work in a timely and quality manner.
- Location and availability of services and personnel.

3. CONTRACTOR'S LICENSES – All pertinent state and local licenses will be required.

4. BUILDING PERMITS – Will be the responsibility of the successful contractor (if required).

5. WORK PROCESS – The contractor is required to notify M&O (Maintenance and Operations) that they are on site as well as sign in at the office. The contractor must sign in and out at the office every time they enter or leave the campus. If the work cannot be completed for any reason, the contractor is required to provide an update to M&O. Once the work is complete, the contractor must let the office know that the work is complete and contact M&O.

6. COMPENSATION – The Contractor shall be compensated, if at all, according to the attached rate and price schedule identified as Exhibit A (Form of Proposal) to the Contract, this Paragraph and the applicable Work Order. Exhibit A shall specify the hourly rate schedule for any services that may be utilized under this Contract. The Work Order shall specify the services required for the individual project. The Contractor shall be compensated for work performed pursuant to a Work Order in the amount of either (1) the actual value of the services authorized by the Work Order and performed by the Contractor at the rate specified in the Exhibit A or (2) the maximum compensation authorized by the Work Order authorizing the work, whichever is lower, unless the parties have agreed in writing in advance of the Contractor's performance of the work to some alternative compensation. The execution of this Contract does not guarantee the Contractor any work. The Contractor shall not be compensated for any work or services performed without specific authorization in a Work Order. The Contractor's net profit on Subcontractors' rates shall be no greater than cost plus 5%. The Contractor's net profit on materials overhead and profit shall be cost plus 10% charged to materials required to complete assigned projects. The Contractor must be able to provide documentation showing the cost of materials per the request of WCPSS for any given job. Costs for specialized tools or equipment required to complete an assigned project will be listed and subject to review by the Owner.

7. SAFETY – Contractor shall be familiar, and in complete compliance, with the following:

- a. All State and Federal OSHA requirements and regulations.
- b. All Wake County Board of Education policies pertinent to the contract.

8. SECURITY - All contractors and their respective sub-contractors will be required to wear an identification badge supplied by the contracting company which contains the name of the employing company, a photo of the employee, and the name of the employee. These badges will be required to be worn in plain view by the employee at all times while on school property. Additionally, all contractors and their respective sub-contractors will be required to sign in and sign out on the visitor's log each day at the school at which they are performing services.

10. QUALIFICATIONS Bidders must have a successful record of experience in the type of work specified.

11. PAYMENT TO THE CONTRACTOR Per project payment will be made within forty five (45) days after the work has been successfully completed, accepted and invoiced.

12. FINAL CLEANING

a. The contractor shall at all times keep the premises free from accumulation of waste materials and debris. At the end of each day, or more often if necessary, the contractor shall perform an overall cleanup of the project, including broom cleaning, raking, vacuuming or mopping and dusting of appropriate surfaces. The contractor shall perform a final cleanup of the project, including, but not limited to, broom cleaning, raking, vacuuming or mopping and dusting and polishing of appropriate surfaces. Final cleaning shall leave the project in a clean, neat condition. The contractor shall perform the cleaning services to the Owner's satisfaction prior to payment.

b. The Contractor shall be responsible for removing all the construction debris from the premises and disposing of the same. It is the responsibility of the Contractor to properly dispose of Hazardous Waste (e.g. batteries, fluorescent lights, pesticides, thermostats containing mercury, etc.) as it is encountered and generated as a result of the execution of this contract. The Contractor is to properly document the disposal with a waste manifest sent to the defined state or federal agency and the building owner representative (EHAS) and in compliance with all authorities (federal, state and local) having jurisdiction.

13. THE WAKE COUNTY BOARD OF EDUCATION reserves the right to reject any or all bids and to waive any informality or technicalities in the award of these bids.



**WAKE COUNTY
PUBLIC SCHOOL SYSTEM**

1551 ROCK QUARRY ROAD
RALEIGH, NORTH CAROLINA 27610
PHONE: 919.664-5767
FAX: 919.856-3714

**WORK REQUEST
PROCESS**

M&O will send the contractor a work order and JOC job transmittal form (JTF). The contractor must enter an estimate for the job and fax or email it to the M&O Requestor. M&O will approve the work by signing the JTF and faxing or emailing it back to the contractor. Also depending on estimated project cost, M&O may get multiple bids for project work.

- OR -

M&O may send a signed JTF with an estimated amount already entered on JTF. The contractor will sign the JTF accepting the work and fax it back to the M&O Requestor.

If the job exceeds the original estimate, the contractor **must** enter the revised amount on the JTF along with a *short* explanation and fax or email it to the M&O requestor. The M&O requestor will approve the revised amount by signing the JTF and fax or email it back to the contractor. Failure to abide by this can result in the total work exceeding the contract amount which is against WCPSS policy.

As stated in the "Instructions to Bidders" document in the original bid request package:

- The contractor is required to notify M&O (Maintenance and Operations) that they are on site as well as sign in at the office, 919-856-8120..
- The contractor must sign in and out at the office every time they enter or leave the campus. If the work cannot be completed for any reason, the contractor is required to provide an update to M&O.
- Upon completion of the work, the contractor must notify the office that the work is complete and have someone in the office sign the WCPSS work order (if the office is open) as well as notify M&O.
- Upon completion of the work, the contractor must also fax or email the WCPSS work order or the Work Order with the Service ticket to the WCPSS requestor with the following information: signature from site office personnel (if office is open), description of repairs and the date the work was completed.

WAKE COUNTY PUBLIC SCHOOL SYSTEM

CONTRACTED SUPPORT SERVICES CRITERIA SHEET

RESPONSE TIME FOR EMERGENCY CALLS IN ALL DISCIPLINES:
TWO HOURS FROM ACCEPTANCE OF CALL.

RESPONSE TIME FOR NORMAL CALLS:

***HVACR* – CALLS ACCEPTED BEFORE 12:00 NOON, RESPONSE SHOULD BE NO LATER THAN 4:00 PM OF THAT DAY. CALLS ACCEPTED AFTER 12:00 NOON, RESPONSE SHOULD BE NO LATER THAN 12:00 NOON OF NEXT WORKING DAY.**

***ELECTRICAL* – CALLS ACCEPTED SHOULD BE RESPONDED TO WITHIN 24 HOURS, OR AS SCHEDULED WITH THE WCPSS REQUESTOR.**

REQUIREMENTS FOR ALL CALLS:

- **QUALIFIED TECHNICIANS MUST BE SENT ON ALL CALLS.**
- **COURTESY CALL TO WCPSS REQUESTOR NOTIFYING HIM/HER OF RETURNING FAXES FOR JOBS ANTICIPATED TO EXCEED THE ESTIMATED COST.**
- **SERVICE PERSONNEL MUST WEAR IDENTIFICATION BADGES WITH THE EMPLOYEE'S PICTURE, SIGN-IN AT SCHOOL OFFICE UPON EACH ARRIVAL TO CAMPUS AND SIGN-OUT WHEN LEAVING CAMPUS.**

- **JOB SITES MUST BE LEFT SAFE AND ORDERLY IF TECHNICIANS IS AWAY FROM JOB. THOROUGH CLEAN-UP AFTER COMPLETION OF WORK. NO EXCEPTIONS.**
- **NO PARKING ON SCHOOL GROUNDS. ALL CONTRACTORS MUST PARK IN PARKING SPACES.**
- **TIMELY NOTIFICATION FOLLOWING COMPLETION OF WORK TO WCPSS REQUESTOR FOR WORK LOG UPDATING:
ALL SERVICE PROVIDERS SHOULD FAX A COPY OF THE WORK ORDER BACK TO THE WCPSS REQUESTOR WITHIN TWO BUSINESS DAYS DETAILING WORK PERFORMANCE. A COPY OF THE TECHNICIAN'S SERVICE REPORT WITH THE WORK ORDER IS PREFERRED.**
- **TIMELY INVOICING FOLLOWING COMPLETION OF WORK:
INVOICES SHOULD BE RECEIVED BY WAKE COUNTY SCHOOLS NO LATER THAN 30 DAYS AFTER COMPLETION OF WORK ORDER.**
- **SERVICE PROVIDERS SHOULD FOLLOW ALL BOARD POLICIES AND GUIDELINES AS LISTED IN CONTRACT PACKAGE.**
- **SERVICE TECHNICIANS SHOULD FOLLOW ALL OSHA RULES AND REGULATIONS WHEN PERFORMING JOB DUTIES.**

FORM OF PROPOSAL
2024 – 2025 One Year Job Order Contract for HVAC Installation and Repair

Optional Renewal
2025 – 2026 Year Job Order Contract for HVAC Installation and Repair

TO: Wake County Public School System
 Energy and Physical Plant Department
 Maintenance & Operations Building
 1551 Rock Quarry Road
 Raleigh, NC 27610

FROM: _____
 BIDDER

 ADDRESS

 CITY STATE ZIP

BID PROPOSAL

(The rates submitted will be for the period of July 1, 2024 through July 31, 2025 eligible for renewal):

WCPSS will issue multiple contracts. This is not a guarantee of work, rather, an allotment of contract dollars based on the amounts bid.

Scope of Work

Contractor must carry appropriate licenses as required by the state of North Carolina. Contractor shall have adequate and qualified staff in order to provide WCPSS with the service and/or response time requested. Contractor must be able to handle multiple calls at one time, respond on a 24 hour, 7 day basis, and will be expected to respond to emergency requests within 2 hours. Scope of work includes installation, maintenance, and repair of HVAC equipment such as air conditioning systems, air and water source heat pumps, heating systems, cooling towers, pumping systems and ventilation systems. Must be knowledgeable of mechanical/electrical schematics and be able to troubleshoot problems relating to these systems. Contractor will have procedures in place for working on these systems and employee training will be kept up to date as per contractors requirements. Contractor will utilize a Lockout/Tagout procedure when working on these systems. It is the responsibility of the Contractor to dispose of any unusable refrigerant and refrigerant oils as per EPA, state and other local regulations. Contractor shall be responsible for any required permitting and incidental supplies or hardware in order to perform any job tasks. Any viable parts removed from HVAC equipment during assigned work shall either be reinstalled in the equipment or returned to WCPSS.

<u>Labor Description</u>	<u>Hourly Rate</u>	<u>Overtime Hr. Rate</u>
Labor Rate for Installation and Repair Technician	(\$_____)	(\$_____)
Labor Rate for Installation and Repair Helper	(\$_____)	(\$_____)

Materials Overhead & Profit Description

The contractor net profit on subcontractors' rates shall be no greater than cost plus 5%. The contractor net profit on materials overhead and profit shall be cost plus 10% charged to materials required to complete assigned projects. The contractor must be able to provide documentation showing the cost of materials per the request of WCPSS for any given job. Costs for specialized tools or equipment required to complete an assigned project will be listed and subject to review by the Owner. The contractor's net profit on rental equipment shall be no greater than cost plus 5%. This equipment is considered to be large specialty equipment that the contractor is not expected to have on hand.

Qualifications

Number of Years in Business _____

Number of Local Service Employees _____

List three references with Business Name, address, contact person and phone number

- 1) _____
- 2) _____
- 3) _____

Confirmation of Bid

1. Legal Name of Firm:

- a. If Firm is a corporation, state that corporation is organized under the laws of the State of _____ please affix corporate seal to this Form of Bid.
- b. If Firm is a partnership, state names of partners:

- c. If Firm is an individual using a trade name, state name of individual:

2. Contractor License Number (license pertaining to discipline): _____

3. Contractor by submitting a proposal acknowledges that it has reviewed all of the documents and shall abide by the terms and conditions of all documents. The contractor further acknowledges that the Master Job Order Contract's and Service Agreement's terms and conditions are not subject to negotiation or modification after the bids are accepted and awarded.

Respectfully submitted, this

_____ day of _____, 2018

(Signature) _____

(Name Typed) _____

(Title) _____

(SEAL IF BIDDER IS A CORPORATION)

The following data is to be furnished by the WCPSS to the Office for Historically Underutilized Businesses, NC Dept. of Administration.

Contractor Information

Company Name: _____

Primary Contact: _____

Street Address: _____

City, State, Zip: _____

Phone: _____

Fax: _____

Email: _____

I certify status as a minority business (at least 51% of business is owned by):
(check all that apply)

- ☐ Black (B)
- ☐ Hispanic (H)
- ☐ Asian American (A)
- ☐ American Indian (I)
- ☐ Female (F)
- ☐ Not Applicable