

**Lee County Board of County Commissioners  
DIVISION OF PROCUREMENT MANAGEMENT**

**INVITATION TO BID (B)**

Solicitation No.: **B180244GWT**  
Solicitation Name: **Electric Motor Repair & Replacement Services**  
Open  
Date/Time: **Monday, June 18, 2018** Time: **2:30 PM**  
Location: **Lee County Procurement Management  
1500 Monroe Street 4th Floor  
Fort Myers, FL 33901**  
Procurement  
Contact: **Geoff Thomas** Title **Procurement Analyst**  
Phone: **(239) 533-8881** Email: **gthomas@leegov.com**  
Requesting  
Dept. **Utilities**

**Pre-Bid Conference:**

Type: **Mandatory**  
Date/Time: **5/30/2018 1:00 PM**  
Procurement: **Public Works Building, 1500 Monroe St 4th Floor, Fort Myers, FL**  
Location: **33901**

**All solicitation documents are available for download at  
[www.leegov.com/procurement](http://www.leegov.com/procurement)**

**Electronic bidding is coming! Visit [www.leegov.com/bid](http://www.leegov.com/bid) to stay informed**

**Notice to Bidder**

**Invitation to Bid #B180244GWT Electronic Motor Repair & Replacement Services**

**Invitation to Bid (B)**

Lee County, Florida, is requesting bids from qualified individuals/firms for

**Electronic Motor Repair & Replacement Services**

Then and there to be publicly opened and read aloud for the purpose of selecting a vendor to furnish all necessary labor, services, materials, equipment, tools, consumables, transportation, skills and incidentals required for Lee County, Florida, in conformance with solicitation documents, which include technical specifications and/or a scope of work.

Those individuals/firms interested in being considered for this solicitation are instructed to submit, in accordance with specifications, their Bids, pertinent to this project prior to

**2:30 PM Monday, June 18, 2018**

to the office of the **Procurement Management Director, 1500 Monroe Street, 4<sup>th</sup> Floor, Fort Myers, Florida 33901**. The Invitation to Bid shall be received in a sealed envelope, prior to the time scheduled to receive Bid(s), and shall be clearly marked with the solicitation name, solicitation number, bidder name, and contact information as identified in these solicitation documents.

The Scope of Work/Specifications for this solicitation is available from [www.leegov.com/procurement](http://www.leegov.com/procurement)

Bidders who obtain Scope of Work/Specifications from sources other than [www.leegov.com/procurement](http://www.leegov.com/procurement) are cautioned that the solicitation package may be incomplete. The County's official bidders list, addendum(s) and information must be obtained from [www.leegov.com/procurement](http://www.leegov.com/procurement). It is the bidder's responsibility to check for posted information. The County may not accept incomplete Bids.

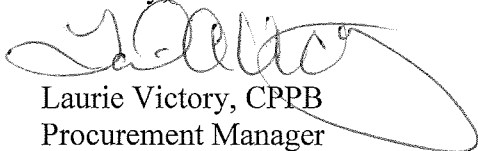
**A MANDATORY Pre-Bid Conference has been scheduled for the following time and location:**

1:00 PM May 30, 2018 Public Works Building, 1500 Monroe Street, Fort Myers FL 33901, 4<sup>th</sup> Floor Conference Room D

For the purpose of discussing the proposed project. Prospective bidders are encouraged to attend. All prospective bidders are encouraged to obtain and review plans, specifications, and scope of work for this bid before the pre-bid conference so that they may be prepared to discuss any question or concerns they have regarding this project. A site visit may follow the pre-bid conference. Questions regarding this solicitation are to be directed, in writing, to the individual listed below using the email address listed below or faxed to (239) 485 8383 during normal working hours.

**Geoff Thomas** [gthomas@leegov.com](mailto:gthomas@leegov.com)

Sincerely,



Laurie Victory, CPPB  
Procurement Manager

\*[WWW.leegov.Com/Procurement](http://WWW.leegov.Com/Procurement) is the County's official posting site

# Terms and Conditions

## INVITATION TO BID (B)

### 1. DEFINITIONS

- 1.1. **Addendum/Addenda:** A written change, addition, alteration, correction or revision to a bid, proposal or contract Agreement/Contract. Addendum/Addenda may be issued following a pre-bid/pre-proposal conference or as a result of a specification or work scope change to the solicitation.
- 1.2. **Approved Alternate:** Solicitation documents may make reference of specific manufacturer(s) or product(s). These references serve only as a recommendation and a guide to minimum quality and performance. The references are not intended to exclude approved alternatives of other manufacturer(s) or product(s).
- 1.3. **Bid/Proposal Package:** A bid/proposal is a document submitted by a vendor in response to some type of solicitation to be used as a basis for negotiations or for entering into a contract.
- 1.4. **Bidder/Responder/Proposer:** One who submits a response to a solicitation.
- 1.5. **County:** Refers to Lee County Board of County Commissioners.
- 1.6. **Due Date and Time/Opening:** Is defined as the date and time upon which a bid or proposal shall be submitted to the Lee County Procurement Management Division. Only bids or proposals received prior to the established date and time will be considered.
- 1.7. **Liquidated Damages:** Damages paid usually in the form of monetary payment, agreed by the parties to a contract which are due and payable as damages by the party who breaches all or part of the contract. May be applied on a daily basis for as long as the breach is in effect.
- 1.8. **Procurement Management:** shall mean the Director of Lee County's Procurement Management Department or designee.
- 1.9. **Responsible:** A vendor, business entity or individual who is fully capable to meet all of the requirements of the bid/proposal solicitation documents and subsequent contract. Must possess the full capability including financial and technical, to perform as contractually required. Must be able to fully document the ability to provide good faith performance.
- 1.10. **Responsive:** A vendor, business entity or individual who has submitted a bid or request for proposal that fully conforms in all material respects to the bid/proposal solicitation documents and all of its requirements, including all form and substance.
- 1.11. **Solicitation:** An invitation to bid, a request for proposal, invitation to negotiate or any document used to obtain bids or proposals for the purpose of entering into a contract.

### 2. ORDER OF PRECEDENCE

- 2.1. In resolving conflicts, errors, and discrepancies, the order of precedence of the bid document is as follows
  - 2.1.1. Florida State Law as applied to Municipal Purchasing in accordance with Title XIX, "Public Business", Chapter 287 "Procurement of Personal Property and Services."
  - 2.1.2. Lee County Procurement Management Manual and Ordinances
  - 2.1.3. Change Order
  - 2.1.4. Agreement
  - 2.1.5. Addenda
  - 2.1.6. Special Conditions
  - 2.1.7. Detailed Scope of Work/Specifications
  - 2.1.8. Supplemental Information, if any
  - 2.1.9. Terms and Conditions

### 3. RULES, REGULATIONS, LAWS, ORDINANCES AND LICENSES

- 3.1. It shall be the responsibility of the bidder to assure compliance with all other federal, state, or county codes, rules, regulations or other requirements, as each may apply. Any involvement with the Lee County shall be in accordance with but not limited to:
  - 3.1.1. Lee County Procurement Management Manual
  - 3.1.2. Pursuant to FL § Section 119.071, Public Records, General exemptions from inspection or copying of public records. Sealed bids, proposals or replies received by the agency pursuant to a solicitation are

exempt from public records request (s. 119.07(1) and s. 24(a), Art. I, of the State Constitution until such time as the agency provides notice of an intended decision or until 30 days after opening the bids, proposals or final replies, whichever is earlier.

3.1.3. FL § 215 regarding scrutinized companies and business operations.

3.1.4. FL § 218 Public Bid Disclosure Act.

3.1.5. Florida State Law as applied to Municipal Purchasing in accordance with Title XIX, "Public Business", Chapter 287 "Procurement of Personal Property and Services."

3.1.6. FL § 337.168 Confidentiality of official estimates, identities of potential bidders, and bid analysis and monitoring system.

3.1.7. FL § Section 607.1501(1) states: A foreign corporation may not transact business in the State of Florida until it obtains a certificate of authority from the Department of State.

3.2. **Local Business Tax Account:** As applicable, anyone providing merchandise or services to the public within the jurisdiction of Lee County must obtain a Lee County business tax account to operate unless specifically exempted.

3.3. **License(s):** Bidder should provide, at the time of the opening of the bid, licenses required for this product and/or service.

#### 4. BID – PREPARATION OF SUBMITTAL

4.1. **Sealed Bid:** Submission must be in a sealed envelope/box, and the outside of the submission must be marked with the following information (Sealed Bid Label Form is attached for your use):

4.1.1. Marked with the words "Sealed Bid"

4.1.2. Bid Number

4.1.3. Bid Title

4.1.4. Bid Due Date

4.1.5. Name of the firm submitting the bid

4.1.6. Contact e-mail and telephone number

4.2. **Bid submission shall include:**

4.2.1. Provide two (2) hard copies. Mark each: one "Original", one "Copy"

4.2.2. Provide one (1) electronic flash drive set of the entire submission documents.

4.2.3. Electronic submission document is to be one single Adobe PDF file in the same order as the original hard copy.

4.2.4. Limit the color and number of images to avoid unmanageable file sizes.

4.2.5. Do not lock files.

4.3. **Submission Format:**

4.3.1. Required Forms: complete and return **all** required forms. If the form is not applicable please return with "Not Applicable" or "N/A" in large letters across the form.

4.3.2. Failure to submit required or requested information may result in the bidder being found non-responsive.

4.3.3. Execution of Bid: All documents must be properly signed by corporate authorized representative, witnessed, and where applicable corporate and/or notary seals affixed. All Bids shall be typed or printed in ink. The bidder may not use erasable ink. All corrections made to the bids shall be initialed.

4.3.4. If a cost/bid schedule was provided in Microsoft Excel format, the returned completed schedule should be included as a Microsoft Excel File on the Flash drive.

4.3.5. The submission should not contain links to other web pages.

4.3.6. Include any information requested by the County necessary to analyze your bid, i.e., required submittals, literature, technical data, financial statements.

4.3.7. Bid Security/Bond(s), as applicable (Construction projects)

4.4. **Preparation Cost:** The Bidder is solely responsible for any and all costs associated with responding to this solicitation. No reimbursement will be made for any costs associated with the preparation and submittal of any bid, or for any travel and per diem costs that are incurred by any Bidder.

#### 5. RESPONSES RECEIVED LATE

- 5.1. It shall be the Bidder's sole responsibility to deliver the bid submission to the Lee County Procurement Management Division prior to or on the time and date stated. All references to date and time herein reference Lee County, FL local time.
- 5.2. Any bids received after the stated time and date will not be considered. The bid shall not be opened at the public opening. Arrangements may be made for the unopened bid to be returned at the bidder's request and expense.
- 5.3. The Lee County Procurement Management Division shall not be responsible for delays caused by the method of delivery such as, but not limited to; internet, United States Postal Service, overnight express mail service(s), or delays caused by any other occurrence.

6. **BIDDER REQUIREMENTS** (unless otherwise noted)

- 6.1. **Responsive and Responsible:** Only bids received from responsive and responsible bidders will be considered. The County reserves the right before recommending any award to inspect the facilities and organization; or to take any other necessary action, such as background checks, to determine ability to perform is satisfactory, and reserves the right to reject submission packages where evidence submitted or investigation and evaluation indicates an inability for the bidder to perform.
  - 6.1.1. Bids may be declared "non-responsive" due to omissions of "Negligence or Breach of Contract" on the disclosure form. Additionally, bidders may be declared "not responsible" due to past or pending lawsuits that are relevant to the subject procurement such that they call into question the ability of the bidder to assure good faith performance. This determination may be made by the Procurement Management Director, after consulting with the County Attorney.
  - 6.1.2. Additional sources may be utilized to determine credit worthiness and ability to perform.
  - 6.1.3. Any bidder or sub-contractor that will have access to County facilities or property may be required to be screened to a level that may include, but is not limited to fingerprints, statewide criminal. There may be fees associated with these procedures. These costs are the responsibility of the bidder or sub-contractor.
- 6.2. **BID--Past Performance:** Bidders past performance and prior dealings with Lee County (i.e., failure to meet specifications, poor workmanship, late delivery, etc.) may be reviewed. Poor or unacceptable past performance may result in bidder disqualification.
- 6.3. Submission packages, unless otherwise noted, will be considered only from bidders normally engaged in the provision of the services specified here in. The bidder shall have adequate organization, facilities, equipment, and personnel to ensure prompt and efficient service to Lee County. The County reserves the right before recommending any award to inspect the facilities and organization; or to take any other action necessary to determine ability to perform satisfactorily, and reserves the right to reject submission packages where evidence submitted or investigation and evaluation indicated an inability of the bidder to perform.

7. **PRE-BID CONFERENCE**

- 7.1. A pre-bid conference will be held in the location, date, and time specified on the cover of this solicitation. The cover will also note if the pre-bid conference is Non-Mandatory or Mandatory. All questions and answers are considered informal. All prospective bidders are encouraged to obtain and review the solicitation documents prior to the pre-bid conference so they may be prepared to discuss any questions or concerns they have concerning this project. All questions must be submitted formally in writing to the procurement staff noted on the first page of the bid document. A formal response will be provided in the form of an addendum (see "County Interpretation/Addendums" for additional information.) A site visit may follow the pre-bid conference, as applicable.
- 7.2. **Non-Mandatory:** Pre-bid conferences are generally non-mandatory, but it is highly recommended that prospective bidders participate.
- 7.3. **Mandatory:** Failure to attend a mandatory pre-bid conference will result in the bid being considered **non-responsive**.

8. **COUNTY INTERPRETATION/ADDENDUMS**

- 8.1. Each Bidder shall examine the solicitation documents and shall judge all matters relating to the adequacy and accuracy of such documents. Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to the solicitation shall be **submitted in writing prior to 5:00 PM at least eight (8) calendar days prior to the date when the submission is due.**

- 8.2. Response(s) will be in the form of an Addendum posted on [www.leegov.com/procurement](http://www.leegov.com/procurement). It is solely the bidder's responsibility to check the website for information. No notifications will be sent by Lee County Procurement Management Division.
- 8.3. All Addenda shall become part of the Contract Documents.
- 8.4. The County shall not be responsible for oral interpretations given by any County employee, representative, or others. Interpretation of the meaning of the plans, specifications or any other contract document, or for correction of any apparent ambiguity, inconsistency or error there in, shall be in writing. Issuance of a written addendum by the County's Procurement Management Division is the only official method whereby interpretation, clarification or additional information can be given.

9. QUALITY GUARANTEE/WARRANTY (as applicable)

- 9.1. Bidder will guarantee their work without disclaimers, unless otherwise specifically approved by the County, for a minimum of twelve (12) months from the date of final completion.
- 9.2. Unless otherwise specifically provided in the specifications, all equipment and materials and articles incorporated in the work covered by this contract shall be new, unused and of the most suitable grade for the purpose intended. Refurbished parts or equipment are not acceptable unless otherwise specified in the specifications. All warranties will begin from the date of final completion.
- 9.3. Unless otherwise specifically provided in the specifications, the equipment must be warranted for twelve (12) months, shipping, parts and labor. Should the equipment be taken out of service for more than forty-eight (48) hours to have warranty work performed, a loaner machine of equal capability or better shall be provided for use until the repaired equipment is returned to service at no additional charge to the County.
- 9.4. If any product does not meet performance representation or other quality assurance representations as published by manufacturers, producers or distributors of such products or the specifications listed, the vendor shall pick up the product from the County at no expense to the County. The County reserves the right to reject any or all materials, if in its judgment the item reflects unsatisfactory workmanship or manufacturing or shipping damage. The vendor shall refund, to the County, any money which has been paid for same.

10. SUBSTITUTION(S)/APPROVED ALTERNATE(S)

- 10.1. Unless otherwise specifically provided in the specifications, reference to any equipment, material, article or patented process, by trade name, brand name, make or catalog number, shall be regarded as establishing a standard of quality and shall not be construed as limiting competition. If a bidder wishes to make a substitution in the specifications, the bidder shall furnish to the County, **no later than ten (10) business days prior to the bid opening date**, the name of the manufacturer, the model number, and other identifying data and information necessary to aid the County in evaluating the substitution. Such information is submitted through the Procurement Management Division. Any such substitution shall be subject to County approval through the issuance of a written addendum by the County's Procurement Management Division. Substitutions shall be approved only if determined by the County to be an **Approved Alternate** to the prescribed specifications.
- 10.2. A bid containing a substitution is subject to disqualification if the substitution is not approved by the County. Items bid must be identified by brand name, number, manufacturer and model, and shall include full descriptive information, brochures, and appropriate attachments. Brand names are used for descriptive purposes only. An **Approved Alternate** product or service may be used.

11. NEGOTIATED ITEMS

- 11.1. Any item not outlined in the Scope of Work/Specifications may be subject to negotiations between the County and the successful bidder.
- 11.2. After award of this bid the County reserves the right to add or delete items/services at prices to be negotiated at the time of addition or deletion.
- 11.3. At contract renewal time(s) or in the event of significant industry wide market changes, the County may negotiate justified adjustments such as price, terms, etc., if in its sole judgment, the County considers such adjustments to be in their best interest.

12. ERRORS, OMISSIONS, CALCULATION ERRORS (as applicable)

- 12.1. **Calculation Errors:** In the event of multiplication/addition error(s), the unit price shall prevail. Written prices shall prevail over figures where applicable. All bids will be reviewed mathematically and corrected, if necessary, using these standards, prior to further evaluation.

### 13. CONFIDENTIALITY

- 13.1. Bidders should be aware that all submissions provided are subject to public disclosure and will **not** be afforded confidentiality, unless provided by Chapter 119 FL §.
- 13.2. If information is submitted with a bid that is deemed "Confidential" the bidder must stamp those pages of the submission that are considered confidential. The bidder must provide documentation as to validate why these documents should be declared confidential in accordance with Chapter 119, "Public Records," exemptions.
- 13.3. Lee County **will not reveal engineering estimates or budget amounts for a project** unless required by grant funding or unless it is in the best interest of the County. According to FL § 337.168: A document or electronic file revealing the official cost estimate of the department of a project is confidential and exempt from the provisions of s. 119.07(1) until the contract for the project has been executed or until the project is no longer under active consideration.

### 14. BID -- CONFLICT OF INTEREST

- 14.1. **Business Relationship Disclosure Requirement:** The award hereunder is subject to the provisions of Chapter 112, Public Officers and Employees: General Provisions, Florida Statutes. All bidders must disclose with their submission the name of any officer, director or agent who is also an employee of the Lee County or any of its agencies. Further, all bidders must disclose the name of any County employee who owns directly or indirectly, an interest of five percent (5%) or more in the bidder's firm or any of its branches.

### 15. ANTI-LOBBYING CLAUSE (Cone of Silence)

- 15.1. Following FL § Section 287.057(23), Upon the issuance of the solicitation, prospective proposers/bidders or any agent, representative or person acting at the request of such proposer/bidder shall not have any contact, communicate with or discuss any matter relating in any way to the solicitation with any Commissioner, Evaluation Review Committee, agent or employee of the County other than the Procurement Management Director or their designee. This prohibition begins with the issuance of any solicitation, and ends upon execution of the final contract or when the solicitation has been cancelled. **If it is determined that improper communications were conducted, the Bidder/Proposer may be declared non-responsible.**

### 16. DRUG FREE WORKPLACE

- 16.1. Lee County Board of County Commissioners encourages Drug Free Workplace programs.

### 17. DISADVANTAGED BUSINESS ENTERPRISE (DBE)

- 17.1. The County encourages the use of Disadvantaged Business Enterprise Bidder(s) as defined and certified by the State of Florida Department of Transportation (DBE).
- 17.2. As requested in the required forms the Bidder is required to indicate whether they and/or any proposed subcontractor(s) are Disadvantaged Business Enterprises (DBE). Lee County encourages the utilization and participation of DBEs in procurements, and evaluation proceedings will be conducted within the established guidelines regarding equal employment opportunity and nondiscriminatory action based upon the grounds of race, color, sex or national origin. Interested certified Disadvantaged Business Enterprise (DBE) firms as well as other minority-owned and women-owned firms, as defined and certified by the State of Florida Office of Supplier Diversity (Minority), are encouraged to respond.

### 18. ANTI-DISCRIMINATION/EQUAL EMPLOYMENT OPPORTUNITY

- 18.1. The bidder agrees to comply, in accordance with FL § 287.134, 504 of the Rehabilitation Act of 1973 as amended, the Americans with Disabilities Act of 1990 (ADA), the ADA Amendments Act of 2008 (ADAAA) that furnishing goods or services to the County hereunder, no person on the grounds of race, religion, color, age, sex, national origin, disability or marital status shall be excluded from participation in, denied the benefits of, or otherwise be subjected to discrimination.

- 18.2. The bidder will not discriminate against any employee or applicant for employment because of race, religion, color, age, sex, national origin, disability or marital status. The bidder will make affirmative efforts to ensure that applicants are employed and that employees are treated during employment without regard to their race, religion, color, age, sex, national origin, disability or marital status.
- 18.3. The bidder will include the provisions of this section in every sub-contract under this contract to ensure its provisions will be binding upon each sub-contractor. The bidder will take such actions in respect to any sub-contractor, as the contracting agency may direct, as a means of enforcing such provisions, including sanctions for non-compliance.
- 18.4. An entity or affiliate who has been placed on the State of Florida's Discriminatory Vendor List (This list may be viewed by going to the Department of Management Services website at <http://www.dms.myflorida.com>) may not submit a bid on a contract to provide goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not award or perform work as a vendor, supplier, sub-contractor, or consultant under contract with any public entity, and may not transact business with any public entity.

## 19. SUB-CONTRACTOR

- 19.1. The use of sub-contractors under this solicitation requires prior written authorization from the County representative.

## 20. BID - PROJECT GUIDELINES (as applicable)

- 20.1. The County has established the following Guidelines, Criteria, Goals, Objectives, Constraints, Schedule, Budget and or Requirements which shall service as a guide to the bidder(s) in conforming to the provision of goods and/or services to be provided pursuant to this Agreement/Contract:
  - 20.1.1. No amount of work is guaranteed upon the execution of an Agreement/Contract.
  - 20.1.2. Rates and all other negotiated expenses will remain in effect throughout the duration of the Agreement/Contract period.
  - 20.1.3. This contract does not entitle any bidder to exclusive rights to County Agreement/Contracts/contracts. The County reserves the right to perform any and all available required work in-house or by any other means it so desires.
  - 20.1.4. In reference to vehicle travel, mileage and man-hours spent in travel time, is considered incidental to the work and not an extra compensable expense.
  - 20.1.5. Lee County reserves the right to add or delete, at any time, and or all material, tasks or services associated with this Agreement/Contract.
  - 20.1.6. Any Single Large Project: The County, in its sole discretion, reserves the right to separately solicit any project that is outside the scope of this solicitation, whether through size, complexity or the dollar value.

## 21. BID – TIEBREAKER

- 21.1. Whenever two or more bids, which are equal with respect to price, quality and service, are received for procurement of commodities or contractual services, from responsive and responsible bidders, the following steps shall be taken to establish the award to the lowest bidder. This method shall be used for all ties.
  - 21.1.1. Step 1 - Local Bidder: Between a local Bidder, and a non-local Bidder, a contract award, or the first opportunity to negotiate, as applicable, shall be made to the local Bidder. **If local preference is prohibited by the funding source then step 2 will replace step 1.**
  - 21.1.2. Step 2 - Drug Free Workplace: At the conclusion of step 1, if all is equal, the Bidder with a Drug Free Workplace program shall be given preference over a Bidder with no Drug Free Workplace program. The contract award, or the first opportunity to negotiate, as applicable, shall be made to the bidder with the Drug Free Workplace program.
  - 21.1.3. Step 3 - Coin Flip: At the conclusion of Step 1 and Step 2, if all is equal, the contract award, or the first opportunity to negotiate, as applicable, the final outcome shall be determined by the flip of a coin.
- 21.2. When the tie has been broken pursuant to the above procedures, the contract award, or the first opportunity to negotiate, as applicable, shall be furnished to the prevailing Bidder.

- 21.3. If an award or negotiation is unsuccessful with the initial bidder, award or negotiations may commence with the next highest bidder, utilizing the tiebreaker steps above to make the determination of next lowest bidder, if necessary.

## 22. WITHDRAWAL OF BID

- 22.1. No bid may be withdrawn for a period of **180 calendar days** after the scheduled time for receiving submissions. A bid may be withdrawn prior to the solicitation opening date and time. Withdrawal requests must be made in writing to the Procurement Management Director, who will approve or disapprove the request.
- 22.2. A bidder may withdraw a submission any time prior to the opening of the solicitation.
- 22.3. After submissions are opened, but prior to award of the contract by the County Commission, the Procurement Management Director may allow the withdrawal of a bid because of the mistake of the bidder in the preparation of the submission document. In such circumstance, the decision of the Procurement Management Director to allow the submission withdrawal, although discretionary, shall be based upon a finding that the bidder, by clear and convincing evidence, has met each of the following four tests:
  - 22.3.1. The bidder acted in good faith in submitting the bid,
  - 22.3.2. The mistake in bid preparation that was of such magnitude that to enforce compliance by the bidder would cause a severe hardship on the bidder,
  - 22.3.3. The mistake was not the result of gross negligence or willful inattention by the bidder; and
  - 22.3.4. The mistake was discovered and was communicated to the County prior to the County Commission having formally awarded the Agreement/Contract.

## 23. PROTEST RIGHTS

- 23.1. Any bidder that has submitted a formal response to Lee County, and who is adversely affected by an intended decision with respect to the award, has the right to protest an intended decision posted by the County as part of the solicitation process.
- 23.2. "Decisions" are posted on the Lee County Procurement Management Division website. Bidders are solely responsible to check for information regarding the solicitation. ([www.leegov.com/procurement](http://www.leegov.com/procurement))
- 23.3. Refer to the "Bid/Proposal Protest Procedure" section of the Lee County "Contracts Manual" for the complete protest process and requirements. The Manual is posted on the Lee County website or may be obtained by contacting the Procurement Management Director.
- 23.4. In order to preserve the right to protest, a written "**Notice Of Intent To File A Protest**" must be filed with the **Lee County Procurement Management Director by 4:00 PM on the 3<sup>rd</sup> working day after the decision affecting your rights is posted on the Lee County website.**
  - 23.4.1. The notice must clearly state the basis and reasons for the protest.
  - 23.4.2. The notice must be physically received by the Procurement Management Director with -in the required time frame. No additional time will be granted for mailing.
- 23.5. To secure the right to protest a "**Protest Bond**" and written "**Formal Protest**" document must be filed **within 10 calendar days** after the date of "**Notice of Intent to File a Protest**" is received by the Procurement Management Director.
- 23.6. **Failure to follow the protest procedures requirement within the time frames as prescribed herein and established by the Lee County Board of County Commissioners, Florida, shall constitute a waiver of the right to protest and bar any resulting claims.**

## 24. AUTHORITY TO UTILIZE BY OTHER GOVERNMENT ENTITIES

- 24.1. This opportunity is also made available to any government entity. Pursuant to their own governing laws, and subject to the Agreement/Contract of the vendor, other entities may be permitted to make purchases at the terms and conditions contained herein. Lee County Board of County Commissioners will not be financially responsible for the purchases of other entities from this solicitation.

## 25. CONTRACT ADMINISTRATION

- 25.1. **Designated Contact:**

- 25.1.1. The awarded bidder shall appoint a person(s) to act as a primary contact for all County departments. This person or back-up shall be readily available during normal working hours by phone or in person, and shall be knowledgeable of the terms and procedures involved.
- 25.1.2. Lee County requires the awarded bidder to provide the name of a contact person(s) and phone number(s) which will afford Lee County access 24 hours per day, 365 days per year, of this service in the event of major breakdowns or natural disasters.
- 25.2. **BID – Term:** (unless otherwise stated in the Scope of Work or Detailed Specifications)
  - 25.2.1. Unless otherwise stated in the scope of work, specifications, or special conditions the default **contract term shall be one (1) year with three (3), one (1) year renewals for a total of four (4) years upon mutual written agreement of both parties.**
  - 25.2.2. The County reserves the right to renew this Agreement/Contract (or any portion thereof) and to negotiate pricing as a condition for each.
  - 25.2.3. The County's performance and obligation to pay under this contract, and any applicable renewal options, is contingent upon annual appropriation of funds.
- 25.3. **BID – Basis of Award:**
  - 25.3.1. The bid is awarded under a system of sealed, competitive bidding to the lowest responsive and responsible bidder.
  - 25.3.2. In the event the lowest responsible and responsive bid for a project exceeds the available funds the County may negotiate an adjustment of the bid price with the lowest responsible and responsive bidder, in order to bring the total cost of the project within the amount of available funds.
  - 25.3.3. The County reserves the right to make award(s) by individual item, group of items, all or none, or a combination thereof. The County reserves the right to reject any and all bids or to waive any minor irregularity or technicality in the bids received. Award will be made to the lowest responsive and responsive bidder(s) within the category chosen for basis of award.
  - 25.3.4. The County reserves the right to award to one or multiple bidders at the discretion of the requesting authority and approval of the Procurement Management Director.
- 25.4. **Agreement/Contracts/Contracts:**
  - 25.4.1. The awarded bidder will be required to execute an Agreement/Contract as a condition of award. A sample of this document may be viewed on-line at <http://www.lee.gov/procurement/forms>.
- 25.5. **Records:**
  - 25.5.1. Retention: The bidder shall maintain such financial records and other records as may be prescribed by Lee County or by applicable federal and state laws, rules and regulations. Unless otherwise stated in the specifications, the bidder shall retain these records for a period of five years after final payment, or until they are audited by Lee County, whichever event occurs first.
  - 25.5.2. Right to Audit/Disclosure: These records shall be made available during the term of the contract as well as the retention period. These records shall be made readily available to County personnel with reasonable notice and other persons in accordance with the Florida General Records Schedule. Awarded Bidder/Proposer(s) are hereby informed of their requirement to comply with FL §119 specifically to:
    - 25.5.2.1. Keep and maintain public records required by the County to perform the service.
    - 25.5.2.2. Upon request from the County's custodian of public records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided or as otherwise provided by law.
    - 25.5.2.3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the County.
    - 25.5.2.4. Upon completion of the contract, transfer, at no cost, to the County all public records in possession of the contractor or keep and maintain public records required by the County to perform the service. If the contractor transfers all public records to the County upon completion of the contract, the contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the

contractor keeps and maintains public records upon completion of the contract, the contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the County, upon request from the County's custodian of public records, in a format that is compatible with the information technology systems of the County.

25.5.3. Public Record: **IF THE VENDOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE VENDOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THE CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 239-533-2221, 2115 SECOND STREET, FORT MYERS, FL 33901, <http://www.leegov.com/publicrecords>.**

25.5.4. Ownership: It is understood and agreed that all documents, including detailed reports, plans, original tracings, specifications and all data prepared or obtained by the successful bidder in connection with its services hereunder, include any documents bearing the professional seal of the successful bidder, and shall be delivered to and become the property of Lee County, prior to final payment to the successful bidder or the termination of the Agreement/Contract. This includes any electronic versions, such as CAD or other computer aided drafting programs.

**25.6. Termination:**

25.6.1. Any Agreement/Contract as a result of this solicitation may be terminated by either party giving **thirty (30) calendar days advance written notice**. The County reserves the right to accept or not accept a termination notice submitted by the vendor, and no such termination notice submitted by the vendor shall become effective unless and until the vendor is notified in writing by the County of its acceptance.

25.6.2. The Procurement Management Director may immediately terminate any Agreement/Contract as a result of this solicitation for emergency purposes, as defined by the Lee County Purchasing and Payment Procedures Manual (Purchasing Manual), (also known as Appendix "D" "AC-4-1.pdf".)

25.6.3. Any bidder who has voluntarily withdrawn from a solicitation without the County's mutual consent during the contract period shall be barred from further County procurement for a **period of 180 days**. The vendor may apply to the Board for a waiver of this debarment. Such application for waiver of debarment must be coordinated with and processed by the Procurement Management Department.

25.6.4. The County reserves the right to terminate award or contract following any of the below for goods or services over \$1,000,000:

25.6.4.1. Contractor is found to have submitted a false certification as provided under FL § 287.135 (5);

25.6.4.2. Contractor has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List (FL §215.473);

25.6.4.3. Contractor has engaged in business operations in Cuba or Syria (FL § 215.471);

25.6.4.4. Contractor has been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel. (FL § 215.4725)

25.6.4.5. The County reserves the right to review, on a case-by-case basis, and waive this stipulation if it is deemed to advantageous to the County.

**26. WAIVER OF CLAIMS**

26.1. Once this contract expires, or final payment has been requested and made, the awarded bidder shall have waived any claims against the County concerning this contract. After that period, the County will consider the bidder to have waived any right to claims against the County concerning this Agreement/Contract.

**27. LEE COUNTY PAYMENT PROCEDURES**

27.1. Unless otherwise noted, all vendors are requested to mail an original invoice to:  
**Lee County Finance Department**

**Post Office Box 2238**

**Fort Myers, FL 33902-2238**

- 27.2. All invoices will be paid as directed by the Lee County payment procedure unless otherwise stated in the detailed specifications for this project.
  - 27.3. Lee County will not be liable for requests for payment deriving from aid, assistance, or help by any individual, vendor, proposer, or bidder for the preparation of these specifications.
  - 27.4. Lee County is generally a tax exempt entity subject to the provisions of the 1987 legislation regarding sales tax on services. Lee County will pay those taxes for which it is obligated, or it will provide a Certificate of Exemption furnished by the Department of Revenue. All bidders should include in their bids, all sales or use taxes, which they will pay when making purchases of material or sub-contractor's services.
28. SAFETY DATA SHEETS (SDS) (as applicable)
- 28.1. In accordance with Chapter 443 of the FL §, it is the vendor's responsibility to provide Lee County with Safety Data Sheets on bid materials, as may apply to this procurement.
29. DEBRIS DISPOSAL (as applicable)
- 29.1. Unless otherwise stated, the bidder shall be fully responsible for the lawful removal and disposal of any materials, debris, garbage, vehicles or other such items which would interfere with the undertaking and completion of the project. There shall not be an increase in time or price associated with such removal.
30. SHIPPING (as applicable)
- 30.1. Cost of all shipping to the site, including any inside delivery charges and all unusual storage requirements shall be borne by the bidder unless otherwise agreed upon in writing prior to service. It shall be the bidders responsibility to make appropriate arrangements, and to coordinate with authorized personnel at the site, for proper acceptance, handling, protection and storage (if available) of equipment and material delivered. All pricing to be F.O. B. destination.
  - 30.2. The materials and/or services delivered under the bid shall remain the property of the seller until a physical inspection and actual usage of these materials and/or services is accepted by the County and is deemed to be in compliance with the terms herein, fully in accord with the specifications and of the highest quality.
31. INSURANCE (AS APPLICABLE)
- 31.1. Insurance shall be provided by the awarded bidder/vendor. Prior to execution of the Agreement/Contract a certificate of insurance (COI) complying with the bid documents shall be provided by the bidder/vendor.

**End of Terms and Conditions Section**



## Lee County Insurance Requirements

### INSURANCE GUIDE

**Minimum Insurance Requirements:** *Risk Management in no way represents that the insurance required is sufficient or adequate to protect the vendors' interest or liabilities. The following are the required minimums the vendor must maintain throughout the duration of this contract. The County reserves the right to request additional documentation regarding insurance provided*

- a. **Commercial General Liability** - Coverage shall apply to premises and/or operations, products and completed operations, independent contractors, contractual liability exposures with minimum limits of:

\$1,000,000 per occurrence  
\$2,000,000 general aggregate  
\$1,000,000 products and completed operations  
\$1,000,000 personal and advertising injury

- b. **Business Auto Liability** - The following Automobile Liability will be required and coverage shall apply to all owned, hired and non-owned vehicles use with minimum limits of:

\$1,000,000 combined single limit (CSL)  
\$500,000 bodily injury per person  
\$1,000,000 bodily injury per accident  
\$500,000 property damage per accident

- c. **Workers' Compensation** - Statutory benefits as defined by FS 440 encompassing all operations contemplated by this contract or agreement to apply to all owners, officers, and employees regardless of the number of employees. Workers Compensation exemptions may be accepted with written proof of the State of Florida's approval of such exemption. Employers' liability will have minimum limits of:

\$500,000 per accident  
\$500,000 disease limit  
\$500,000 disease – policy limit

\*The required minimum limit of liability shown in a. and b. may be provided in the form of "Excess Insurance" or "Commercial Umbrella Policies." In which case, a "Following Form Endorsement" will be required on the "Excess Insurance Policy" or "Commercial Umbrella Policy."

**Verification of Coverage:**

1. Coverage shall be in place prior to the commencement of any work and throughout the duration of the contract. A certificate of insurance will be provided to the Risk Manager for review and approval. The certificate shall provide for the following:

- a. The certificate holder shall read as follows:

Lee County Board of County Commissioners  
P.O. Box 398  
Fort Myers, Florida 33902

- b. *“Lee County, a political subdivision and Charter County of the State of Florida, its agents, employees, and public officials”* will be named as an “Additional Insured” on the General Liability policy, including Products and Completed Operations coverage.

**Special Requirements:**

1. An appropriate “Indemnification” clause shall be made a provision of the contract.
2. It is the responsibility of the general contractor to insure that all subcontractors comply with all insurance requirements.

**End of Insurance Guide Section**

## SPECIAL CONDITIONS

These are conditions that are in relation to this solicitation only and have not been included in the County's standard Terms and Conditions or the Scope of Work.

### 1. **TERM**

Multi-year Renewals: The successful bidder shall be responsible for furnishing and delivering to the Lee County requesting Department(s) the commodity or services on an "as needed basis" for a one-year (1) period. There may be an option to extend this contract as specified in the Scope of Work or specifications upon the approval of both the County and the successful bidder at the time of extension or renewal for three (3), additional one (1) year periods.

### 2. **BIDDER/SUB-CONTRACTOR RELATIONSHIP**

The prime bidder/contractor on a project may not also be listed as a sub-contractor to another firm submitting a bid for the same solicitation. Should this occur, all responses from the involved/named firms will be considered non-compliant and rejected for award. Sub-contractors may be listed on multiple submissions for the same solicitation.

### 3. **BASIS OF AWARD**

The basis of award for this bid will be the overall low bidder (Grand Total) meeting specifications. Award will be made to a primary and secondary vendor.

Each bidder must indicate total hourly rates. A wage rate for emergency and non-emergency jobs shall be indicated. This wage rate shall include all wage classifications involved and shall include all miscellaneous tools and small equipment needed to perform the job.

Each bidder must indicate the % markup from their procurement cost for parts and materials used under this contract. Vendor invoices for parts/materials shall be available for random audits to verify procurement costs.

NOTE: Lee County reserves the right, at the Purchasing Director's discretion, not to award certain items on the Bid Proposal Form.

NOTE: Lee County reserves the right to reject unbalanced Bid (a bid where a normally low cost item is priced well out of the normal range).

Each bidder must indicate total hourly rates. A wage rate for emergency and non-emergency jobs shall be indicated. This wage rate shall include all wage classifications involved and shall include all miscellaneous tools and small equipment needed to perform the job.

Each bidder must indicate the % markup from their procurement cost for parts and materials used under this contract. Vendor invoices for parts/materials shall be available for random audits to verify procurement costs.

NOTE: Lee County reserves the right, at the Purchasing Director's discretion, not to award certain items on the Bid Proposal Form.

NOTE: Lee County reserves the right to reject unbalanced Bid (a bid where a normally low cost item is priced well out of the normal range).NOTE: Lee County reserves the right, at the Purchasing Director's discretion, not to award certain items on the Bid Proposal Form.

NOTE: Lee County reserves the right to reject unbalanced Bid (a bid where a normally low cost item is priced well out of the normal range).

**End of Special Conditions Section**

## **SCOPE OF WORK AND SPECIFICATIONS**

### **LEE COUNTY, FLORIDA DETAILED SPECIFICATIONS FOR**

#### **1. SCOPE**

Lee County Board of County Commissioners is seeking the services of both a primary vendor and a secondary vendor to provide all necessary labor, materials, and equipment to service both in the field and in their shop, electric motor repair work. Such services will consist of, but not limited to, the repair and rewind of motors, field services in the removing and installing of equipment, predictive and preventive maintenance of rotating equipment, technical support, substantial inventory, panel shop capabilities and the ability to retrofit wells from existing turbine motors to submersible motors.

#### **2. OVERVIEW**

These detailed specifications consist of several sections, several of which include a series of requirements to which the vendor must answer either "Yes" or "No". Obviously, it is desired that vendors respond with a "Yes" to all requirements; and while answering "No" may not eliminate the vendor from consideration for an award, an explanation as to why that requirement could not be met should be included with your bid response. Lee County Utilities (LCU) will review this explanation and will make a determination as to whether or not it is satisfactory enough to permit the consideration of that vendor's pricing for an award. All decisions made by Lee County Utilities (LCU) will be final.

Only those vendors who, in the sole opinion of the county, best satisfy the needs of the Lee County Utilities will have their pricing considered for an award. All decisions will be final. A site visit to the vendor's facility may be made to substantiate qualifications. Misrepresentation of qualifications or equipment necessary to properly service the County's requirements will be cause for immediate revocation of recommendation.

#### **3. REGULAR DEALER**

Bids will be considered only from firms which qualify as a "regular dealer".

A "regular dealer" means a firm that owns, operates, or maintains a store, warehouse, or other establishment in which the materials or supplies required for the performance of the contract are bought, kept in stock, and regularly sold to the public in the usual course of business. To be a regular dealer, the firm must engage in, as its principal business and in its own name, the purchase and sale of the products in question.

#### **4. MAJOR BREAKDOWNS/NATURAL DISASTERS**

Lee County requires that the awarded vendor provide the name of a contact person and phone number which will afford Lee County access twenty-four hours per day, 365 days per year, of this product or service in the event of major breakdowns or natural disasters.

Lee County reserves the right to purchase the product or service listed in this quotation elsewhere in an emergency situation.

#### **5. COMPENSATION RATE AND FEE SCHEDULE CHANGES**

The bid price shall be firm and will not vary during the first year of the agreement. However, if the awarded vendor requests a price increase during the remaining years of the contract, it will be reviewed by both the Department of Public Works (Utilities Division) and the Purchasing Division. If accepted by Lee County, the increase will only take effect after the awarded vendor receives the approval in writing from the Purchasing Division.

## **6. WARRANTIES**

As a minimum, the awarded vendor shall provide warranties on all work as follows:

- \*On labor and materials - 12 Months,
- \*On rebuilt or repaired equipment - 90 days,
- \*On new equipment, manufacturer's warranty period.

## **7. DOCUMENTATION**

The awarded vendor shall provide to LCU all installation, operation and maintenance manuals for all new equipment supplied and/or installed; as well as all warranties.

## **8. AUTHORIZATION TO PERFORM WORK**

Upon award LCU will provide contractor a list of LCU employees empowered to authorize work.

## **9. INVOICING**

Bidders should provide a sample invoice with their bid. At a minimum, this invoice should include the following items.

- County work order, purchase order or contract number.
- Name of facility where work was performed.
- Address or location of facility.
- Problem corrected and description of work performed.
- Identifiers for equipment worked on; e.g. lift station number, pump number, serial number, horsepower, manufacturer, etc.
- For labor; name, classification, work performed, total straight time hours worked, total premium time hours worked and extended amount.
- For repair components; item, quantity, unit price and extended amount.
- For replacement equipment supplied and/or installed; item description, manufacturer, model number, serial number, location where delivered or installed, price, mark-up and extended amount.
- For crew, premium time hours for crew, rate for crew, crane use hours, rate and extended amounts.
- For any subcontracted work; name of subcontractor, work performed, price, mark-up and extended amount.
- For Miscellaneous items, e.g. overnight freight, pick-up or delivery charges, consumables .etc.; item, cost, mark-up if any and extended amount.
- For specialty services, if any; service provided, name of provider, hours, rate and extended amount.

## **SECTION 1 - QUALIFICATIONS**

### **Introduction**

As stated above, Lee County is seeking the services of both a primary vendor and a secondary vendor to provide all necessary labor, materials, and equipment to service both in the field and in their shop, electric motor repair work. Such services will consist of, but not limited to, the repair and rewind of motors, field services in the removing and installing of equipment, predictive and preventive maintenance of rotating equipment, technical support, substantial inventory, panel shop capabilities and the ability to retrofit wells from existing turbine motors to submersible motors.

The awarded vendor shall comply with NFPA 70 E codes while doing work in any facilities. Any violations of NFPA 70 E codes the vendor will be dismissed from the job site. There will be no exceptions.

## Response Format

Bidders should submit three (3) copies of their submittal. The response format shall contain a letter of transmittal and the following three tabs with the stated information behind each tab. Where specified, the maximum number of pages in each section of the response shall consist of single-sided, 8-1/2" x 11" paper, using 12-point characters. Responses exceeding these limits may be considered non-responsive.

### 1. Report on the Firm (maximum 25 pages)

- a. The history of the firm, its corporate structure, years in business, current facility, fleet, inventory resources, and areas of expertise.
- b. Capabilities and technical background of dedicated staff.
- c. List any current or past clients for whom the firm is providing or has provided a similar service program. Include a description of the services provided, the scale of the program, and a point of contact for each. Vendor must demonstrate a proficiency for servicing a utilities infrastructure like that of Lee County.

### 2. Project Approach (maximum 25 pages)

Describe, in detail, the proposed strategy for providing the services as listed. Include emergency and non-emergency response times, estimates of typical repair times for motors and pumps, a sample predictive maintenance proposal, and your warranty policy.

### 3. Additional Information (optional) (maximum 10 pages)

Provide any additional information that may assist in the evaluation of the quotation.

## VENDOR REQUIREMENTS

Lee County shall require that the vendor provide the following services in conjunction with their motor repair capabilities. Vendors must indicate below for each numbered statement whether you can comply (yes) or cannot comply (no) and should submit this page with your quotation. If your answer is no, please briefly explain why you cannot comply.

**1. Field Service Capabilities** – provide trained personnel and service vehicles to Lee County in the removing and re-installing of all rotating equipment if required.

Yes \_\_\_\_\_ No \_\_\_\_\_

**2. Predictive Maintenance** – provide trained personnel and service vehicles to Lee County for vibration analyses, field balancing, and laser alignment of all equipment pulled out of service and reinstalled where applicable. Vendor must own and maintain an IRD Data Pac 1500 and a Fixture Laser or equivalent to perform these services. A hard copy of results will be furnished with each repair.

Yes \_\_\_\_\_ No \_\_\_\_\_

**3. U.L. 508 Control Panel Builder** – Vendor will supply to Lee County the ability to design, engineer, fabricate and install a U.L. Listed Control Panel. It is not necessary for the vendor to fabricate or engineer these panels in-house; panels not built on the vendor's premises but are built to County specifications in a U.L. 508 panel facility will be acceptable

Yes \_\_\_\_\_ No \_\_\_\_\_

**4. Inventory** – Vendor will maintain a motor inventory of high efficiency motors from fractional up to and including 150HP, 460-volt, TEFC, 1800RPM at his repair facility. A copy of his current inventory will be required prior to ratifying contract.

Yes \_\_\_\_\_ No \_\_\_\_\_

### **INSURANCE REQUIREMENTS (MINIMUM):**

The company submitting the RFQ must be able to provide a copy of their current Certificate of Insurance or a letter from their insurance company evidencing the fact that the Vendor is able to be insured pertaining to Electric Motor Repair & Replacement Services as per the insurance requirements detailed in these specifications. The certificate or letter should be included with your bid response.

Yes \_\_\_\_\_ No \_\_\_\_\_

## **1. Introduction**

### **1.1 OVERVIEW**

This Model Repair Specification lists the suggested minimum requirements for the repair and overhaul of low-voltage random-wound three-phase AC squirrel cage induction motors, which are sent for repair. It pertains to motors with anti-friction bearings (ball and roller) only

### **1.2 INTENT**

The intent of this Model Repair Specification is to achieve a consistent, high quality diagnosis, repair and/or overhaul of a motor, and to return it to good operating condition with a minimum of delay and cost. Not all repair situations can be covered in this Model Repair Specification. In the absence of specific instructions, the requirement shall be to restore the motor to as-manufactured condition.

### **1.3 REFERENCE DOCUMENTS**

The references to be used in conjunction with these Model Repair Specifications are the latest editions of the following:

UL UL674 Electric Motors and Generators For Use In Hazardous Locations

EASA AR100-1998 Recommended Practice For The Repair of Rotating Electrical Apparatus

IEEE IEEE Std. 43, Recommended Practice for Testing Insulation Resistance of Rotating Machinery

IEEE Std. 112, IEEE Standard Test Procedure for Polyphase Induction Motors and Generators

ISO ISO Std 1940-1, Mechanical Vibration—Balance Quality Requirements of Rigid Rotors

NEMA NEMA Std. MG-1, Motors and Generators

ABMAANSI/ABMA Std. 7, Shaft and Housing Fits for Metric Radial Ball and Roller Bearings

Vendors should indicate for each numbered statement whether they can comply (yes) or cannot comply (no) and submit these pages with their quotation. If your answer is no, please briefly explain why you cannot comply.

#### 1.4 HAZARDOUS LOCATIONS

Motors intended for use in hazardous locations will have a nameplate to that effect. The repair work shall be done in a facility that has been certified by the Underwriters Laboratories to meet the requirements of UL674 Qualification of Facilities Engaged in the Repair of Electric Motors and Generators for use in Hazardous Locations. Subcontracting these services will be acceptable. If the explosion-proof characteristics of the motor are not to be maintained, then the nameplate shall be altered to reflect this, and the motor will no longer be considered suitable for use in hazardous areas.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 1.5 GENERAL

##### 1.5.1 Unavoidable Degradation

During the course of repair, if any damage is found which cannot be fully repaired, the County's approval is required before proceeding. Likewise, if any repair is indicated which may result in a permanent degradation of efficiency or other performance parameters, the County's approval is required before proceeding.

Yes \_\_\_\_\_ No \_\_\_\_\_

##### 1.5.2 Operating Environment

If this motor operates in severe environmental conditions, it will be indicated on the accompanying motor repair form. No repair methods or materials may be used which make the motor more vulnerable to these conditions than it was as originally built.

Yes \_\_\_\_\_ No \_\_\_\_\_

##### 1.5.3 If Powered by an Inverter

If "Powered by ASD" is checked on the accompanying Motor Repair Form, this motor is powered by a pulse-width-modulated inverter. The windings shall be sufficiently insulated and supported to withstand this type of power supply. Magnet wire must be of a design intended for inverter duty. The wire manufacturer and specification shall be reported to the County. Quad wire rated for inverter duty will only be accepted.

Yes \_\_\_\_\_ No \_\_\_\_\_

##### 1.5.4 Subcontracted Work

Motor repair vendor will be responsible for performing all work. Absolutely no subcontracting of any repair work will be allowed. All winding will be performed at vendor's facility. The purchasing of form wound coils will be allowed.

Yes \_\_\_\_\_ No \_\_\_\_\_

## 2. **Repair Procedures**

### 2.1 **DOCUMENTATION**

#### 2.1.1 Repair Forms

The motor will be accompanied by a Motor Repair Form from the County which will list the perceived problems, the operating environment, the urgency of the repair, past problems where applicable, the required repair, cost constraints, missing parts and the person within the Utilities to be contacted about the repair. This form shall be used as a guide for the repair. A sample is included in Section 4 of these specifications.

During repair, actions and findings will be recorded on a Repairer's Tracking Form. It shall contain records of all the work done, problems noted, checks and measurements taken during the work, repairs carried out and the final tests conducted prior to shipping.

Requirements for the work, checks and tests are listed in the following sections.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.1.2 **Expanded Work Scope**

If tests and inspection indicate problems beyond the initial scope of the listed repair, then the designated person shall be contacted and given a description of the problems, plus an estimate of their effect on delivery and costs.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.1.3 File

The repairer will keep a copy of the Motor Repair Form in their file for the particular job for up to three years from the date of delivery.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.2 **INCOMING INSPECTION**

On receipt of the motor and after reading the Motor Repair Form, the repairer shall do the initial tests set out below, plus any other tests indicated by the form.

#### 2.2.1 Intent

The intent of the initial tests shall be to determine and record the probable cause of failure, if any, to document certain pre-repair parameters, and to determine what work is required.

Yes \_\_\_\_\_ No \_\_\_\_\_

The repairer will keep a copy of the Motor Repair Form in their file for the particular job for up to three years from the date of delivery.

Yes \_\_\_\_\_ No \_\_\_\_\_

## 2.2 INCOMING INSPECTION

On receipt of the motor and after reading the Motor Repair Form, the repairer shall do the initial tests set out below, plus any other tests indicated by the form.

### 2.2.1 Intent

The intent of the initial tests shall be to determine and record the probable cause of failure, if any, to document certain pre-repair parameters, and to determine what work is required.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.2.2 Visual

A visual inspection shall be made to assess the general condition of the outside of the motor for cracks, broken welds and missing parts.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.2.3 Insulation to Ground

An insulation resistance test to ground shall be performed, at a voltage suitable for the motor's voltage rating and the apparent condition of the motor. The testing shall be as follows:

- The initial test voltage shall be 500 volts DC.
- For motors where there is more than one winding, the insulation shall also be tested between windings, at the test voltage appropriate to the lower voltage winding, with other windings grounded.
- The duration of the insulation test shall be one minute. The temperature shall be recorded.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.2.4 Bearings

The shaft shall be manually rotated to check for any obvious problems with the bearings or shaft.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.2.5 No Load Run

If possible, the motor shall be run on no load, at nameplate voltage and checked for balanced currents and vibration. The readings shall be noted on the Repairer's Tracking Form.

Yes \_\_\_\_\_ No \_\_\_\_\_

## 2.3 DISMANTLING

### 2.3.1 Identify Problem

After the incoming inspection, the motor shall be dismantled to the extent needed to either fully identify or repair the problem, or to do the specified overhaul.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.3.2 Markings

End brackets and frames shall be clearly match-marked with numerals or letters.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.3.3 Parts Storage

Bolts and small parts shall be stored in dedicated containers and parts from other jobs shall not be kept with them.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.3.4 Insulated Bearings

If the motor has insulated bearings, note which, if any have the insulation deliberately bridged. The insulation resistance of each insulated bearing shall be at least 10-megohms with a 500-volt DC test.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.3.5 Dowels

If dowels or fitted bolts are used to ensure accurate fits, the location of these pieces shall be identified.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.3.6 Explosion Proof

Repairer or repairer's subcontractor must be certified by UL for repair of explosion-proof motors. For motors certified for hazardous locations, extra care shall be taken to ensure that joints and flame paths are not damaged during the work. If damage requiring other than normal repair is found, Utilities shall be notified before proceeding with repair.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.3.7 Rotor Removal

For horizontal motors where the shaft rotor assembly is too heavy to be removed easily by hand, one or two cranes shall be used to move the shaft, with a close fitting pipe installed over one end of the shaft to act as a shaft extension. Attention shall be paid to the following:

- Care shall be taken that the slings do not damage the bearing surfaces or the rotor.
- Under no circumstances shall the stator windings be touched by any of the parts being moved.

Yes \_\_\_\_\_ No \_\_\_\_\_

## 2.4 VERTICAL MOTORS

Vertical motors shall be dismantled according to the manufacturer's instruction book. The assembly of vertical motors is critical. Particular attention shall be paid to, and records kept of:

- The amount of rotor lift (end play);
- The make and types of bearings, particularly the thrust bearings including orientation of thrust bearings;
- The arrangement of the thrust and guide bearings, including specially ground mating surfaces;
- The axial and radial clearances (fit) to the shaft and housing;
- The method of lubrication of both upper and lower bearings;
- The method of bearing insulation, if any; and

- Any other particular features of the motor configuration.

Yes\_\_\_\_\_ No\_\_\_\_\_

## 2.5 WINDING REMOVAL

### 2.5.1 General

For motors that are to be rewound, the core shall be stripped, cleaned, tested and repaired.

Yes\_\_\_\_\_ No\_\_\_\_\_

### 2.5.2 Take Data

Winding data shall be recorded so as to permit replicating original configuration.

Yes\_\_\_\_\_ No\_\_\_\_\_

### 2.5.3 Core Loss

A core loss test shall be done on all stators both before and after stripping and iron repair, to check for damaged interlaminar insulation. The tests shall be done at a flux density of 85,000 lines per square inch rms. Exciting current and watts loss shall be recorded each time, as well as a physical check carried out for hot spots. If data from previous tests are available, the results shall be compared. Testing at other flux densities may be done if previous data is available.

If hot spots exceed 15°C above the average temperature after 10 minutes, or losses are excessive overall either before or after stripping, the situation shall be discussed with Utilities before proceeding further. For a core without any hot spots, the losses after stripping shall not be more than 10% higher than the pre-strip losses. To avoid misleading results, the second core loss test should not be done until the core has been cleaned and dried.

Vendor will own and maintain a core loss tester equivalent to or better than a Phenix Core Loss Tester.

Yes\_\_\_\_\_ No\_\_\_\_\_

### 2.5.4 Burn Out

The winding shall be burned out in a controlled temperature burnout oven where the part temperature is limited by means of fuel control and supplementary (water spray) cooling to 3600C (6800F) for organic (C3) or 4000C (7500F) for inorganic (CS) interlaminar insulation. If a higher temperature is deemed necessary, repairer shall reference communication or documentation from the motor manufacturer indicating that the core iron can safely withstand the temperature.

Yes\_\_\_\_\_ No\_\_\_\_\_

### 2.5.5 Aluminum Frame

Frames may be chemically stripped if burnout facilities are not available. Other methods of stripping may only be used with Utilities' approval.

Yes\_\_\_\_\_ No\_\_\_\_\_

## 2.6 CORE PREPARATION

### 2.6.1 **Cleaning**

The stripped core shall be cleaned of all foreign material, such as insulation debris, and dried.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.6.2 **Iron Damage**

All obvious iron damage, plus any problems indicated by the core loss tests, and significant frame damage, shall be reported to Utilities before proceeding further.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.6.3 **Method of Repair**

The method of repair to damaged cores shall be discussed with Utilities and shall be chosen from the following:

- Grinding. Selective grinding with a small sharp power tool.
- Spray between laminates. Separating laminations and re-insulating with spray-on inter-laminar insulation.
- Mica between laminations. Inserting split mica between the laminations.
- Restacking. Restacking, with deburred laminations and new interlaminar insulation.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.6.4 **Core Loss Test**

A final core loss test shall be done as described in sub-section 2.5.3.

## 2.7 **REWINDS**

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.7.1 **Winding Details**

The total cross sectional area of a turn, the turns per coil, the span and connection of the coils shall not be changed without authorization from Utilities.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.7.2 **Thermal Class**

Class H or higher system materials shall be used throughout. Windings which were originally Class F or lower shall be rewound with Class H magnet wire and materials.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.7.3 **Sensors**

Temperature sensing devices shall be replaced with devices comparable to those previously used.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.7.4 **Explosion Proof**

If the temperature class of the insulation of an explosion-proof motor has been increased, a temperature sensor shall be installed to monitor and limit the motor surface temperature to the original maximum external temperature. The motor shall be tagged with a warning to the operator that to maintain the hazardous area classification, the sensor must be connected to shut down the motor.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.7.5 Insulation Materials

Insulation shall include, as a minimum, the following components:

- Turn insulation. Multiple build coating turn insulation of polyamide, polyimide or a combination of both over polyester, or equivalent;
- Slot Liner. Slot liner extending at least one-quarter inch past each end of the slot;
- Separator. Center strip or separator between the top and bottom coil sides in a slot;
- Wedge. A top piece to hold the coils in the slot (where needed, a bottom filling piece shall be used to make up any extra space in the slot); and,
- Phase Barriers. Phase barriers between end turns of different phases (these shall be trimmed to permit clear airflow).

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.7.6 End Turns

The end turns shall be fully compacted so that there are no loose wires. Both sets of end turns, plus leads and jumpers, shall be laced tightly together so that each coil is tied securely to the two adjacent coils.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.7.7 Connections

All connections shall be brazed with materials that will not be subject to corrosion in the specified operating environment. They shall have no sharp edges and shall be insulated.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.7.8 Winding Test

Before impregnation, the winding shall be tested to verify that there are no wrong connections or shorted turns. This will include a surge comparison test, a high potential test, and winding resistance test using a Baker D12000 Hi-Pot and a Baker DLRO Tester or equivalent. Voltage used shall be as indicated in EASA Recommended Practices for the Repair of Rotating Electrical Apparatus or other standards approved by Utilities. Any defects shall be corrected and retested before impregnating. Test results shall be recorded in the Repairer's Tracking Form.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.7.9 Impregnation

The rewound stator shall be impregnated in one of the following ways:

Dip-and-Bake. Double dip-and-bake cycle using resin or varnish and a temperature controlled bake oven (baking times and temperatures shall be recorded in the Repairer's Tracking Form.)

Trickle. A trickle epoxy or polyester treatment where the resin is poured into the end turns and slots of a vertically inclined stator, which has been heated with controlled electric current to assist in curing the resin.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.8 ROUTINE OVERHAULS

### 2.8.1 Testing

After dismantling, the following procedure shall be followed:

- Winding and cooling ducts shall be cleaned, dried and inspected.
- Winding insulation resistance shall be tested at 500 volts DC.
- The duration of the test shall be one minute. The minimum acceptable level after one minute, corrected to a 400C reference temperature per IEEE 43, is 20 megohms. Levels less than 20 megohms shall be discussed with Utilities.
- If satisfactory levels are not attained, the winding shall be re-cleaned and dried thoroughly at a temperature not exceeding 900C (1950F), and then retested.
- After successful insulation resistance to ground has been achieved, the winding shall be given a high potential or surge comparison test. Voltage level used shall be as indicated in EASA Recommended Practice for the Repair of Rotating Electrical Apparatus or other standards approved by Utilities.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.8.2 Cleaning

The components, including the stator windings, shall be cleaned with hot water and a suitable detergent after heavy deposits of dirt and grease have been removed by scraping and wiping.

If necessary, brushes shall be used to clean small passages in components.

Solvents shall not be used to clean insulation, but may be used on mechanical components of the motor.

All components shall be thoroughly dried at a temperature less than 900C (1950F), for as long as it takes to remove all signs of moisture. For windings, this will be indicated by the insulation resistance stabilizing after some hours of drying.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.8.3 Repairs

After satisfactory insulation resistance has been attained, all loose or damaged wedges, slot sticks, coil supports etc., shall be replaced or repaired.

The winding shall then be given a minimum of two dip-and-bakes using a Class H or higher- grade varnish. Immersion and baking times shall be sufficient to penetrate any cracks and give a sealed durable finish to the insulation. The repairer shall notify Utilities if a dip-and- bake is undesirable.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.8.4 Other

The routine overhaul of other parts of the motor shall return the parts to good condition.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.8.5 Reassembly

The assembly of the motor after overhaul is covered in sub-section 2.15.

Yes \_\_\_\_\_ No \_\_\_\_\_

## 2.9 ROTOR TEST AND REPAIR

### 2.9.1 Testing

All rotors shall be given a test for damaged bars, whether the motor is suspect in this area or not. This test shall apply a stable single-phase voltage to the stator of the assembled motor while the shaft is slowly turned through at least one revolution. Any fluctuations of stator current in excess of 3 percent shall be investigated further. Other methods may be used if the stator winding is faulty and it can be shown that they have a good record of detecting faults.

For motors where electrical or mechanical problems with the rotor are suspected, more sophisticated tests shall be used. These include one or more of the following:

- Growler tests;
- Current analysis or vibration analysis of a loaded motor;
- Physical examination;
- Ultrasonic examination of the bars and end rings; and,
- Core loss tests (axial current thorough shaft).

Yes \_\_\_\_\_ No \_\_\_\_\_

### **2.9.2 Fabricated Cage Repair**

Since repair of squirrel cages can be expensive, no work shall be done in this area without Utilities' approval.

Yes \_\_\_\_\_ No \_\_\_\_\_

### **2.9.3 Cage Replacement**

For cage replacement, the conductive, metallurgical and strength characteristics of both the bar and end ring materials shall be determined and duplicated. Since changing the rotor resistance or density has major effects on the motor performance, no change in these is permitted without Utilities' approval.

Any parts that are to be reused shall be cleaned and examined for defects.

Yes \_\_\_\_\_ No \_\_\_\_\_

### **2.9.4 Testing**

After fabrication, the joints shall be examined and tested by ultrasonic or comparable means.

Yes \_\_\_\_\_ No \_\_\_\_\_

### **2.9.5 Balance**

The rotor shall be dynamically balanced to the tolerances listed in sub-section 2.14 of these specifications.

Yes \_\_\_\_\_ No \_\_\_\_\_

### **2.9.6 Cast Rotor Repair**

A defective cast cage shall not be repaired without prior authorization from Utilities.

The method of repair shall be to remove the old cage by chemical means, without damaging the laminations, followed by re-barring with extruded, aluminum bars and duplicate cast aluminum end rings to give the same cage resistance as before.

Yes \_\_\_\_\_ No \_\_\_\_\_

### **2.9.7 Iron Repairs**

Because of the costs involved, this work shall not be done without prior approval from Utilities. If tests or observation indicate that the laminations have been damaged, they shall be repaired or replaced with new laminations. Care shall be taken to ensure a consistent air gap.

Yes \_\_\_\_\_ No \_\_\_\_\_

## **2.10 SHAFT REPAIR**

### **2.10.1 General**

If information on the Motor Repair Form or any tests indicates that there may be a shaft problem, it shall be tested and repaired or replaced. If there is any risk or uncertainty in the proposed repair method, this shall be discussed with Utilities prior to proceeding.

Yes \_\_\_\_\_ No \_\_\_\_\_

### **2.10.2 Requirements**

When the work is completed, the shaft shall meet the following criteria:

- Total Indicated Runout. It shall be straight, with a Total Indicated Runout (TIR) when measured in V blocks, of no more than 0.051 mm (0.002 inch) for up to 41.3 mm (1.625 inch) shaft diameter and no more than 0.003 inch for larger diameters.
- No Cracks. The shaft shall have no cracks. If ultrasonic, magnetic particle, dye penetrant or other testing methods are needed to verify this; they shall be documented in repair records.
- Straightness. The shaft shall be straight, parallel and undamaged at the bearing areas. If any measurable but acceptable deviation from this is noted, it shall be documented in repair records.
- Journal Repairs. Make journal repairs by welding or plating, followed by machining and grinding, with fit as specified in section 2.11.4.
- Fit To Rotor. The shaft shall be a tight fit to the rotor iron. If there is looseness, the shaft shall be built up and turned for proper interference fit, or shall be replaced.
- Shaft Material. New shafts shall be machined from AISI Gr. C1045 hot rolled steel or better. For special applications, the service center shall consult with the manufacturer and report recommendations to Utilities.
- Tolerances. Shaft extension dimension tolerances shall be within the limits specified in NEMA MG-1, Motors and Generators sections.

Yes \_\_\_\_\_ No \_\_\_\_\_

## **2.11 ANTI-FRICTION BEARINGS**

### **2.11.1 New Bearings**

Anti-friction bearings shall always be replaced. New bearings shall be SKF brand, unless otherwise approved by Utilities. If the bearing type, size, sealing, shielding or configuration is changed, this shall be noted on a supplemental nameplate. If the original bearing race showed pitting from shaft current, the causes and remedy for this shall be discussed with Utilities.

Yes \_\_\_\_\_ No \_\_\_\_\_

### **2.11.2 Shielding, Sealing**

If the method of shielding, sealing or lubricating is to be changed, it shall be approved by Utilities.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.11.3 Clearance

Unless otherwise specified by the manufacturer or Utilities, C3 clearance bearings shall be used for all bearings.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.11.4 Tolerances

Fitting tolerances to the journals and housings shall be per manufacturer's specifications. Out of tolerance fits shall be restored. (Reference ANSI/ABMA Std. 7-1995 as a guide.)

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.11.5 Heating

The bearing shall be heated, without use of direct flame, to approximately 940C (2000F) to permit it to be slid easily onto the shaft up to the shoulder. Bearings with bores under 45mm may be press fit.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.11.6 Grease

Greasable bearings shall be lubricated as specified in the EASA Recommended Practice for the Repair of Rotating Electrical Apparatus or other standards approved by Utilities.

Lubrication shall be in accordance with the motor manufacturer's recommendations if available. Otherwise fill the cavity to 1/3 capacity. The lubricant shall be compatible with both Utilities' lubricant and the lubricant packed by the bearing manufacturer.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.11.7 Insulated Bearings

Insulated bearing resistance shall be at least 10 megohms. Voltage applied from the megohmmeter should not exceed 500 VDC. Alternately a 1 15VAC test lamp may be used. No light should be visible from the lamp filament. (Reference IEEE 112-1996, section 9.4.3. or EASA AR100-1998)

Yes \_\_\_\_\_ No \_\_\_\_\_

## 2.12 End Brackets

### 2.12.1 Requirements

End brackets shall fit snugly to the stator frame. Worn dowel holes and rabbet fits shall be repaired.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.12.2 Tolerances

See section 2.11.4 for the fit of the outer diameter of anti-friction bearings to housings.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.12.3 Repairs

Repairs to end bracket-bearing housings shall be by building up the metal and machining to size. Welding, plating and sleeving are the accepted methods.

Epoxies and other compounds shall not be used for locking bearings.

Yes \_\_\_\_\_ No \_\_\_\_\_

## 2.13 OTHER DEVICES

### 2.13.1 Fans

Fans shall be checked for cracks and fit to the shaft or rotor.

Fans shall be firmly fixed to the shaft or rotor by the original factory method, unless there has been corrosion between dissimilar metals, in which case a new method shall be proposed to Utilities. Welding to the shaft is not permitted.

Repairs to fans shall only be done after discussion with Utilities.

New fans shall be as supplied by the original manufacturer if available.

Fans used in motors for use in hazardous locations shall be made of material that will not cause sparking; either by impact or by build-up of static electricity.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.13.2 Temperature Sensors

Temperature sensors shall be installed in the motor as originally found or as otherwise specified by Utilities.

- Bearing. Bearing sensors shall be of the same type as those removed and shall be located to sense, as nearly as possible, the highest bearing temperature. If the original bearing sensor was insulated, the replacement shall also be insulated.
- Winding. Sensor type shall be the same as the original and will usually be located in the end turns.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.13.3 Leads

Leads shall be flexible and multi-stranded, and have at least the same cross sectional area as the original leads. Temperature class must be the same as original or better.

Main power and accessory leads shall be indelibly marked using the same marking systems as the incoming motor. If this is illegible, then the system described in NEMA MG-1, Motors and Generators, Section 2 shall be used and a notice describing the system attached to the terminal box. Every effort shall be made to keep the original direction of rotation.

Lugs, if used, shall be suited for the application and have all cable strands in the lug. No cable strands may be cut off or bent back to facilitate insertion in the lug.

If crimp lugs are used, the correct make and style of die shall be used for the particular lug, and the correct compression applied.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.13.4 Terminal Boxes

Terminal boxes shall be returned to original condition. In particular, the following items must be confirmed.

- Missing bolts and gaskets for both the cover and the motor-to-box joint shall be replaced.
- On motors certified for hazardous environments, the junction boxes shall be sealed off from the main body of the motor by a sealing compound approved by UL for this application.

- Damaged flanges shall be repaired. No paint or gaskets shall be left on the flanges of boxes for explosion-proof motors.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.13.5 Space Heaters

Space heaters shall be tested for insulation resistance for one minute at 500 volts. A 10- megohm minimum resistance is acceptable.

They shall be tested for correct functioning.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.13.6 Vibration Sensors

Vibration sensors shall be replaced in their original locations.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.14 Balancing

The motor rotor shall be dynamically balanced in a balance stand before assembly of the motor. An IRD 5000 pound dynamic balancer or equal will be used for every motor repair and recorded on repairer's tracking card. Balance criteria include the following:

- Half key. It shall be balanced with a half key in the keyway.
- Tolerance G2.5 (ISO 1940-1). Generally, the permitted total imbalance is  $i5W/N/2 = \text{oz in/plane}$  where W is weight of rotor in pounds and N is operating speed in RPM. (426 W/N/2 gin. in/plane)
- Tolerance G1.0 (ISO 1940-1). Two Pole rotors should be balanced to  $6W/n/2 = \text{oz.in./plane}$ . (170.4 W/n/2 gin. in/plane)
- Material removal. If material is removed, structural integrity and fan capacity shall be maintained.
- Added material. Added material shall be able to withstand the centrifugal forces and be positioned either in the manufacturer's designated positions and locked in place, or positioned in a location where centrifugal force will tend to keep the material in place. Weights may be attached to metallic parts only.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 2.15 REASSEMBLY

The assembly of the motor is the reverse of the disassembly process and the following points shall be observed:

- Match marks shall line up.
- On reinsertion of the rotor, take care not to damage the journals or the stator windings. Cranes, slings and extension pipes shall be used on heavy rotors. Check axial alignment of stator and rotor cores.
- Dowels and fitted bolts shall go back into the same holes that they came from.
- Where they can be measured, all air gaps shall be within 10 percent of the average.
- On motors with insulated bearings, the insulation shall be checked and noted. (See 2.11.7)
- On vertical motors, the lift on the shaft shall be the same as the original manufacturer's setting, unless Utilities and the repairer agree that a modified setting would give better performance.
- Motors for use in hazardous environments shall have all the explosion-proof features maintained and verified in accord with UL674.

Yes \_\_\_\_\_ No \_\_\_\_\_

## 2.16 FINAL TESTS

### 2.16.1 Insulation

Prior to running, the motor shall be given an insulation resistance test to ground in the following manner: For rewound motors, a DC high potential test shall be conducted at 1700 VDC for motors to be powered by less than 250VAC service voltage. Motors to be powered between 250VAC and 600VAC service voltage shall be tested at 1700VDC plus 3.4 times the machine's voltage rating, e.g. 3264VDC for a 460VAC machine. Readings corrected to 400C, which are less than 20 megohms, shall be discussed with Utilities. Vendor will own and maintain a Baker D12000 Hi-Pot Tester or equivalent to perform these tests and shall print out results and attach to each job tracker.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.16.2 Running Test

After the insulation tests, the motor shall be run at no load at full terminal voltage, with either a half key or a half coupling, on the shaft. If the motor uses an external oil supply and removal system in normal use, a similar system shall be arranged for the test. The test shall determine that:

- No Load Amps. No load current unbalance at balanced rated voltage shall be less than 2 percent.
- Vibration. Horizontal, vertical and axial readings shall be taken at each bearing and results recorded for Utilities' review. Repairer shall record vibration of motor with motor bolted down to an isolated test stand installed in repairers shop for accurate readings.
- Temperature Rise. Temperature rise after levels stabilize shall be within normal limits on the frame and bearings.
- Shipment At the completion of the test, the motor shall be painted as specified by the Utilities, and prepared for shipment. Any lubricant and coolant inlets and outlets shall be plugged and masked before painting and shipping. Any special precautions or preparations that should be noted before powering the motor shall be indicated on a tag.
- Testing of all motors shall be done with a Hubbell Hipotronics Motor Tester or equivalent and be capable of printing out no-load running amps, voltage, vibration, and bearing temperature for each motor repair. Tester shall be able to run AC motors up to 4160-volts and DC up to 600-volts.

Yes \_\_\_\_\_ No \_\_\_\_\_

## 3. Quality Control

### 3.1 MEASURING INSTRUMENTS

#### 3.1.1 Calibration

All measuring instruments shall be calibrated regularly. The calibration records shall be available for Utilities' inspection. Minimum frequency of calibration shall be annually, except:

- Insulation Testers. Insulation resistance testers—every six months to a known resistance;
- Dimension Meters. Micrometers, vernier calipers and other dimension measuring devices—every six months against a minimum grade AA gauge block set; and,
- Bore Gauges. Bore gauges shall be calibrated to a certified standard before and after each use.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 3.1.2 Storage

All measuring equipment shall be stored in a clean dry environment.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 3.2 MATERIALS

#### 3.2.1 Anti-Friction Bearings

Anti-friction bearings shall be replaced with new SKF brand or equal, upon authorization from Utilities department. Bearings shall be stored in their factory packaging in a clean, dry, location. The location shall be isolated from any vibration strong enough to be felt by hand.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 3.2.2 Solid Insulation

Insulating materials such as slot liners, tapes and phase insulation shall be used and shall meet or exceed the temperature class H rating and shall be compatible with the resins used.

Specifications for the materials shall be obtained from the material supplier and kept for checking their suitability for the application.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 3.2.3 Resins and Varnishes

The manufacturer's material specifications for resins and varnishes shall be kept on file, to permit checking for correct storage, handling and usage.

A sample shall have been taken and analyzed to be satisfactory within three months of its being used on a motor.

Yes \_\_\_\_\_ No \_\_\_\_\_

#### 3.2.4 Other Materials

Other materials shall be new and of good quality. In particular the following shall be confirmed:

- Lead Wires. Lead wires shall be multi-stranded and flexible with insulation meeting or exceeding the temperature and voltage class of the motor.
- Magnet Wire. Magnet wire for random-wound motors shall be compatible with the other insulation system components and shall be insulated with a polyamide, polyimide or a combination of both, over a polyester base coat, or equivalent. Any wire damaged in storage or working shall be replaced. The manufacturer's specifications for the insulation shall be kept on file for reference. Inverter grade wire rated 1600-volts shall be used on all motors regardless if the motor is run off of a variable frequency drive or not.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 3.3 TESTS AND INSPECTION DURING WORK

#### 3.3.1 Records

Records shall be kept of all tests and inspections carried out during the work. Signed copies of these records shall be shipped in original form, at the same time as the motor, to the designated contact person. Vendor shall keep all records for a period of not less than 3 years from date of repair.

Yes \_\_\_\_\_ No \_\_\_\_\_

### 3.3.2 Access

Lee County Personnel shall have access to the repair facilities at all times that work is being done, for the purposes of checking progress and inspecting the work. Due to emergency response time and the need for shop inspections, vendor's repair facility shall be no more than 90 miles from Detar Warehouse at 5180 Tice Street, Fort Myers, FL. NO EXEPTIONS.

Yes\_\_\_\_ No\_\_\_\_

### 3.4 FINAL INSPECTION AND TEST

For all motors over 100 HP, or when Utilities specifies, Utilities shall be informed when the final inspection and testing of the motor is to take place. Utilities shall have the right to be present for tests on any motors.

In emergency cases, tests will not be held up waiting for Utilities representatives, but every effort shall be made to keep Utilities informed so that they can be present if possible.

All final inspection and test results shall be sent, in their original form, to the designated contact person

Yes\_\_\_\_ No\_\_\_\_

## 4. Motor Repair Form

<b>Repairer:</b>			<b>Date:</b>	
<b>Motor</b>	Facility	Dept.	Process	Description
<b>Designation:</b>				
Manufacturer:		Typ	e:	Power:
Volts:	Amperes:	Speed:		Frame:
Serial #:		Bea	rings:	Lubricant Grade:
		Rep	lace w/bearing	
		by (	mfg):	
Other:				
<b>Service:</b>			Powered by ASD	Contamination
Explain:			High Altitude	High Ambient Temp
Reason sent for repair:				

Required work:	
Past problems with machine:	
Missing parts:	
Urgency: (check one)	Cost limitations:
Rush, full O.T.	Contact with price before work
Rush, limited O.T.	Go ahead, advise price
ASAP, no O.T.	Other
Routine (specify time)	
Hold points if required	
Special instructions	
<b>Contact:</b>	<b>Phone:</b>
<b>Reference:</b>	

## End of Scope of Work and Specifications Section

It is the Bidder's/Proposer's responsibility to review the submittal request in its entirety and ensure that all submittal requirements are included within their submission package. Failure to submit required forms may deem your company as non-responsive.

### **FORMS DESCRIPTION & INSTRUCTIONS**

#### **INVITATION TO BID**

This table provides a brief list, description, and instructions regarding the standard requested forms that should be submitted with all bids or proposals. This is not intended to be an all-inclusive list of forms required for your submission, but rather a guide to assist in completion of the County's standard forms. Bidders/Proposers should utilize the Lee County Document Management Form for a complete list of all forms required for project submission.

<b><u>Form #</u></b>	<b><u>Title/Description</u></b>
----------------------	---------------------------------

<b>1</b>	<b><i>Solicitation Response Form</i></b>
----------	--

All signatures must be by a corporate authorized representative, witnessed, and corporate and/or notary seal (as applicable.) The corporate or mailing address must match the company information as it is listed with the Florida Department of State Division of Corporations. Attach a copy of the web-page(s) from <http://www.sunbiz.org> as certification of this required information. Sample attached for your reference.

Verify that all Addenda and tax identification number have been provided.

<b>1a</b>	<b><i>Bid/Proposal Form</i></b>
-----------	---------------------------------

This form is used to provide itemization of project cost. A more detailed "schedule of values" may be requested by the County.

<b>*</b>	<b><i>Business Relationship Disclosure Requirement</i></b>
----------	--

Sections 112.313(3) and 112.313(7), F.S., prohibit certain business relationships on the part of public officers and employees, their spouses, and their children. If this **disclosure is applicable, the Bidder must request the form entitled "INTEREST IN COMPETITIVE BID FOR PUBLIC BUSINESS"** (Required by § 112.313(12)(b), F.S.) to be completed and **returned with the Solicitation Response**. **It is the Bidder's responsibility to request the form and disclose this relationship; failure to do so may result in being declared non-responsive.**

NOTICE: UNDER THE PROVISIONS OF § 112.317, F.S., A FAILURE TO MAKE ANY REQUIRED DISCLOSURE CONSTITUTES GROUNDS FOR, AND MAY BE PUNISHED BY, ONE OR MORE OF THE FOLLOWING: IMPEACHMENT, REMOVAL OR SUSPENSION FROM OFFICE OR EMPLOYMENT, DEMOTION, REDUCTION IN SALARY, REPRIMAND, OR A CIVIL PENALTY NOT TO EXCEED \$10,000.00.

<b>2</b>	<b><i>Affidavit Certification Immigration Laws</i></b>
----------	--

Submission of this form constitutes acknowledgement that the Bidder is in compliance in regard to all applicable immigration laws.

3

**Reference Survey**

Provide this form to reference respondents. For Bids, this form will be requested from the apparent low Bidder prior to the award. (not required to submit with bid)

1. **Section 1:** Bidder/Proposer to complete with reference respondent's information prior to providing to them for their response. (This is **not** the Bidder/Proposer's information.)
2. **Section 2:** Enter the name of the Bidder/Proposer; provide the project information in which the reference respondent is to provide a response.
3. The reference respondent should complete "**Section 3.**"
4. **Section 4:** The reference respondent to print and sign name
5. **Three (3) Reference responses** are to be provided upon request.
6. Failure to obtain reference surveys may make your company non-responsive.

4

**Negligence or Breach of Contract Disclosure Form**

The form may be used to disclose negligence or breach of contract litigation that your company may have been a part of over the past ten (10) years. You may need to duplicate this form to list all history. If the Bidder has more than ten (10) lawsuits, you may narrow them to litigation of the company or subsidiary submitting the Solicitation Response. Include, at a minimum, litigation for similar projects completed in the State of Florida. Final outcome should include in whose favor the litigation was settled and whether a monetary amount was awarded. The settlement amount may remain anonymous.

If you have **no litigation**, enter "**None**" in the first "**type of incident**" block of the form. Please do not write N/A on this form.

5

**Affidavit - Principal Place of Business**

Certifies Bidder's location information.

6

**Sub-Contractor List**

To be completed and returned when sub-contractors are to be utilized and are known at the time of the submission.

7

**Public Entity Crime Form**

Any person or affiliate, as defined by statute, who has been placed on the convicted vendor list following a conviction for a public entity crime, may not submit a Bid on a Contract to provide any goods or services to the County; may not submit a Bid on a contract with the County for the construction or repair of a public building or a public work; may not submit Bids or leases of real property to the County; may not be Awarded or perform Work as a contractor, supplier, subcontractor, or consultant under a contract with the County, and may not transact business with the County in excess of \$25,000.00 for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

8

**Trench Safety** Removed: Not Applicable for this solicitation

Typically required in construction projects where trench excavations are in excess of 5 feet deep per Florida Trench Safety Act (90-96, Laws of Florida)

9

**Bid Bond** Removed: Not Applicable for this solicitation

Guarantee to County that Bidder/Proposer will take on job if selected.

10

**Signatory Authorization Affidavit**

Providing Authorization to individuals to execute legal documents on behalf of the Bidder/Proposer.

**11 Minimum Qualifications Requirementse**

States the minimum qualifications the Bidder/Proposer is required to meet in order to be considered for award or evaluation.

**\* Bid/Proposal Label**

Self-explanatory. Please affix to the outside of the sealed submission documents.

**\* Include any licenses or certifications requested**

Local Business Tax Account (as applicable) issued by City and/or County entity. This is necessary for all Florida vendors.

It is the Bidder's responsibility to ensure the Solicitation Response is mailed or delivered in time to be received no later than the specified opening date and time. (If Solicitation is not received prior to the deadline, it cannot be considered or accepted)

Form 1 – Solicitation Response Form



LEE COUNTY PROCUREMENT MANAGEMENT  
**SOLICITATION RESPONSE FORM**

Date Submitted: \_\_\_\_\_ Deadline Date: 6/18/2018

SOLICITATION IDENTIFICATION: B180244GWT

SOLICITATION NAME: Electric Motor Repair & Replacement

COMPANY NAME: \_\_\_\_\_

NAME & TITLE: (TYPED OR PRINTED) \_\_\_\_\_

BUSINESS ADDRESS: (PHYSICAL) \_\_\_\_\_

CORPORATE OR MAILING ADDRESS: \_\_\_\_\_

☐ SAME AS PHYSICAL \_\_\_\_\_

**ADDRESS MUST MATCH SUNBIZ.ORG** \_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_ FAX \_\_\_\_\_

**NOTE REQUIREMENT: IT IS THE SOLE RESPONSIBILITY OF THE BIDDER/PROPOSER TO CHECK LEE COUNTY PROCUREMENT MANAGEMENT WEB SITE FOR ANY ADDENDA ISSUED FOR THIS PROJECT. THE COUNTY WILL POST ADDENDA TO THIS WEB PAGE, BUT WILL NOT NOTIFY.**

By responding to this sealed solicitation, the Bidder/Proposer makes all representations required by the instructions and further warrants and represents that: Bidder/Proposer has examined copies of all the solicitation documents and of the following addenda:

No. _____	Dated: _____	No. _____	Dated: _____	No. _____	Dated: _____
No. _____	Dated: _____	No. _____	Dated: _____	No. _____	Dated: _____

Tax Payer Identification Number: \_\_\_\_\_

(1) Employer Identification Number -OR- (2) Social Security Number:

**\*\* Lee County collects your social security number for tax reporting purposes only**

Please submit a copy of your registration from the website [www.sunbiz.org](http://www.sunbiz.org) establishing your firm as authorized (including authorized representatives) to conduct business in the State of Florida, as provided by the *Florida Department of State, Division of Corporations*. (a sample is attached for your reference)

1 **Collusion Statement:** Lee County, Florida The undersigned, as Bidder/Proposer, hereby declares that no person or other persons, other than the undersigned, are interested in this solicitation as Principal, and that this solicitation is submitted without collusion with others; and that we have carefully read and examined the specifications or scope of work, and with full knowledge of all conditions under which the services herein is contemplated must be furnished, hereby bid/propose and agree to furnish this service according to the requirements set out in the solicitation documents, specifications or scope of work for said service for the prices as listed on the county provided price sheet or (CCNA) agree to negotiate prices in good faith if a contract is awarded.

2 **Scrutinized Companies Certification:**  
Section 287.135, FL §, "Prohibition against contracting with scrutinized companies." Prohibits agencies from contracting with companies, for goods or services over \$1,000,000, that are on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, Scrutinized Companies that Boycott Israel List, have been engaged in a boycott of Israel, or been engaged in business operations in Cuba or Syria. The County reserves the right to review, on a case-by-case basis, and waive this stipulation if it is deemed to advantageous to the County.

As the person authorized to sign on behalf of Respondent, I hereby certify that the company identified above is in compliance with Section 287.135, FL §. I understand that submission of a false certification may subject company to contract termination, civil penalties, attorney's fees, and/or costs.

**Form#1 – Solicitation Form, Page 2**

**3 Business Relationship Disclosure Requirement:** Sections 112.313(3) and 112.313(7), FL §, prohibit certain business relationships on the part of public officers and employees, their spouses, and their children. See Part III, Chapter 112, FL §, and/or the brochure entitled "A Guide to the Sunshine Amendment and Code of Ethics for Public Officers, Candidates and Employees" for more details on these prohibitions. However, Section 112.313(12), FL § (1983), provides certain limited exemptions to the above-referenced prohibitions, including one where the business is awarded under a system of sealed, competitive bidding; the public official has exerted no influence on bid negotiations or specifications; and where disclosure is made, prior to or at the time of the submission of the bid, of the official's or his spouse's or child's interest and the nature of the intended business. The Commission on Ethics has promulgated this form for such disclosure, if and when applicable to a public officer or employee.

**If this disclosure is applicable request form "INTEREST IN COMPETITIVE BID FOR PUBLIC BUSINESS" (Required by 112.313(12)(b), FL § (1983)) to be completed and returned with solicitation response. It is the bidder/proposer's responsibility to disclose this relationship, failure to do so could result in being declared non-responsive.**

☐ **Business Relationship Applicable (request form)**

☐ **Business Relationship NOT Applicable**

**4** Disadvantaged Business Enterprise (DBE) bidder/proposer? If yes, please attach a current certificate.

☐

Yes

☐

No

**ALL SUBMISSIONS MUST BE EXECUTED BY AN AUTHORIZED AUTHORITY OF THE BIDDER/PROPOSER. WITNESSED AND SEALED (AS APPLICABLE)**

\_\_\_\_\_  
Company Name (Name printed or typed)

\_\_\_\_\_  
Authorized Representative Name (printed or typed)

\_\_\_\_\_  
Authorized Representative's Title (printed or typed)

\_\_\_\_\_  
Authorized Representative's Signature



(Affix Corporate Seal, as applicable)

\_\_\_\_\_  
Witnessed/Attested by:

(Witness/Secretary name and title printed or typed)

\_\_\_\_\_  
Witness/Secretary Signature

Any blank spaces on the form(s), qualifying notes or exceptions, counter offers, lack of required submittals, or signatures, on County's Form may result in the submission being declared non-responsive by the County.

**Detail by Entity Name****Florida Profit Corporation**

Bill's Widget Corporation

**Filing Information**

Document Number 655555  
 FE/EIN Number 5111111111  
 Date Filed 09/22/1980  
 State FL  
 Status ACTIVE  
 Last Event AMENDED AND RESTATED ARTICLES  
 Event Date Filed 07/25/2006  
 Event Effective Date NONE

**Principal Address** Verify either Principal or Mailing address is on Form 1

555 N Main Street  
 Your Town, USA 99999

Changed 02/11/2012

**Mailing Address**

555 N Main Street  
 MYour Town, USA 99999

Changed 02/11/2012

**Registered Agent Name & Address**

My Registered Agent  
 111 Registration Road  
 Registration, USA 99999

Name Changed: 12/14/2006

Address Changed: 12/14/2006

**Officer/Director Detail****Name & Address****Title P**

President, First  
 555 AVENUE  
 Anytown, USA 99999

**Title V**

President, Second  
 555 AVENUE  
 Anytown, USA 99999

**IMPORTANT:**

For corporations, ALL documents must be signed by the president of the company or an authorized individual. For any individual other than the president, we will need one of the following to confirm their authority to sign:

1. a corporate resolution by the Board of Directors, or
2. an extract of minutes, or
3. an extract of Vote by the Board of Directors

If the company's articles of incorporation identify additional positions that have the power to bind the corporation, we will accept the articles of incorporation with verification from the president that a certain individual serves in that role (e.g., the president confirms that John Doe is the CEO, and the articles of incorporation provide that the CEO has the power to bind the company).

With respect to an LLC, the authority to bind a limited liability company is controlled by Florida statutes. Managers or managing members have inherent authority to bind an LLC.

If the president of a corporation or a manager/managing member of an LLC delegates their authority, such delegation must be sent to us on company letterhead with the President's or manager's/managing member's original, wet signature.

v01/03/0918



Lee County Procurement Management  
**BID/PROPOSAL FORM**

**Company Name:** \_\_\_\_\_

**Solicitation #** B180244GWT **Solicitation Name** Electric Motor Repair & Replacement

Having carefully examined the “Terms and Conditions”, and the “Detailed Scope of Work”, all of which are contained herein, propose to furnish the following which meet these specifications.

**Multi-year and Renewals**

The successful Bidder shall be responsible for furnishing and delivering to the Lee County requesting Department commodity or services on an “as needed basis for a one-year (1) period or as specified in the Scope of Work as per specifications. There will be an option to extend this contract as specified in the Scope of Work or specification upon approval of both the County and the vendor at the time of the extension or renewal.

CONTRACTOR’S RESPONSE TIME MUST, IN KEEPING WITH THE CRITICALITY OF THE SERVICE PROVIDED BY LEE COUNTY UTILITIES (LCU), BE NO MORE THAN 8 HOURS; AND PREFERABLY SIGNIFICANTLY LESS THAN THAT. PREFERENCE MAY BE GIVEN AT TIME OF AWARD TO VENDORS WHOSE RESPONSE TIME IS 4 HOURS OR LESS. PLEASE PROVIDE YOUR RESPONSE TIME IN THE SPACE PROVIDED BELOW.

**RESPONSE TIME:** \_\_\_\_\_

Hourly Rates – Personnel	(Basis of Award)	Straight Time
Classification		
In house Shop Technicians (300 hrs/yr)		300hrs x \$____/hr= \$____/yr.
Machinists, lathe operators (100 hrs/yr.)		100hrs x \$____/hr = \$____/yr.
Field Service Technicians (600 hrs/yr.)		600hrs x \$____/hr = \$____/yr.
Technical Specialists (225 hrs/yr.)		225hrs x \$____/hr = \$____/yr.
Shop Coordinator (225 hrs/yr.)		225hrs x \$____/hr = \$____/yr.
Welder (175 hrs/yr. )		175hrs x \$____/hr = \$____/yr.
<b>Straight Time</b>		
<b>(1.) Total Annually</b>		* \$_____
<b>Hourly Rates – Equipment and Crew</b>	<b>(Basis of Award)</b>	<b>Straight Time</b>
<b>Item/Classification</b>		
Crane – 20 ton with 75- foot reach. (50 hrs/yr.)		50hrs x \$____/hr = \$____/yr
Two man crane crew. (50 hrs/yr.)		50hrs x \$____/hr = \$____/yr
Transportation for field service personnel. (50 hrs/yr.)		50hrs x \$____/hr = \$____/yr

**Straight Time**

(2.) Total Annually \* \$ \_\_\_\_\_

Mark-Ups (Basis of Award)	
Repair components (annual expense \$66,000)	\$66,000 x _____ %Mark up = \$ _____ annual cost
New equipment (annual expense \$120,000)	\$120,000 x _____ %Mark up = \$ _____ annual cost
Miscellaneous Items: e.g. overnight freight on special parts, consumables...etc	Cost plus a <b>0%</b> <u>Mark-up</u>
(3.) TOTAL ANNUALLY (For Mark-Ups add annual costs for repair & new) *\$ _____	

**\*GRAND TOTAL (Basis of Award)** \$ \_\_\_\_\_ (Grand total includes all total annual costs for straight time and mark-ups only. Do not include Options "A"-Overtime or Option "B"-Specialty Service)

**OPTION A**

Hourly Rates – Personnel		(Option A) OVERTIME
Classification		<u>Overtime</u> shall not exceed time and a half. (125 hrs/yr overtime for all positions)
In house Shop Technicians		75hrs x \$ ____/hr = \$ ____/yr.
Machinists, lathe operators		75hrs x \$ ____/hr = \$ ____/yr.
Field Service Technicians		75hrs x \$ ____/hr = \$ ____/yr.
Technical Specialists		75hrs x \$ ____/hr = \$ ____/yr.
Shop Coordinator		75hrs x \$ ____/hr = \$ ____/yr.
Welder		75hrs x \$ ____/hr = \$ ____/yr.
(1.) Total Annually		\$ _____

Hourly Rates – Equipment and Crew ) (Option A) OVERTIME	
Item/Classification	Overtime shall not exceed time and a half
Crane – 20 ton with 75- foot reach. (50 hrs/yr.)	Same as straight time rate
Two man crane crew. (50 hrs/yr.)	50hrs x \$____/hr = \$____/yr
Transportation for field service personnel. (50 hrs/yr.)	Same as straight time rate.

(2.)Total Annually \$\_\_\_\_\_

**OPTION B:**

<b>Specialty Service Classification (if any are anticipated).</b>
\$_____/HR. (for example: laser alignment, vibration analysis)



LEE COUNTY  
SOUTHWEST FLORIDA

AFFIDAVIT CERTIFICATION IMMIGRATION LAWS

SOLICITATION NO.: B180244GWT SOLICITATION NAME: Electric Motor Repair & Replacement Services

LEE COUNTY WILL NOT INTENTIONALLY AWARD COUNTY CONTRACTS TO ANY CONTRACTOR WHO KNOWINGLY EMPLOYS UNAUTHORIZED ALIEN WORKERS, CONSTITUTING A VIOLATION OF THE EMPLOYMENT PROVISIONS CONTAINED IN 8 U.S.C. SECTION 1324 a(e) {SECTION 274A(e) OF THE IMMIGRATION AND NATIONALITY ACT ("INA").

LEE COUNTY MAY CONSIDER THE EMPLOYMENT BY ANY CONTRACTOR OF UNAUTHORIZED ALIENS A VIOLATION OF SECTION 274A(e) OF THE INA. **SUCH VIOLATION BY THE RECIPIENT OF THE EMPLOYMENT PROVISIONS CONTAINED IN SECTION 274A(e) OF THE INA SHALL BE GROUNDS FOR UNILATERAL CANCELLATION OF THE CONTRACT BY LEE COUNTY.**

BIDDER/PROPOSER ATTESTS THAT THEY ARE FULLY COMPLIANT WITH ALL APPLICABLE IMMIGRATION LAWS (SPECIFICALLY TO THE 1986 IMMIGRATION ACT AND SUBSEQUENT AMENDMENTS).

Company Name: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_

The foregoing instrument was signed and acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_  
20\_\_\_\_, by \_\_\_\_\_ who has produced  
(Print or Type Name)  
\_\_\_\_\_ as identification.  
(Type of Identification and Number)

\_\_\_\_\_  
Notary Public Signature

\_\_\_\_\_  
Printed Name of Notary Public

\_\_\_\_\_  
Notary Commission Number/Expiration

The signee of this Affidavit guarantee, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made. **LEE COUNTY RESERVES THE RIGHT TO REQUEST SUPPORTING DOCUMENTATION, AS EVIDENCE OF SERVICES PROVIDED, AT ANY TIME.**

**REFERENCE SURVEY**

Solicitation # B180244GWT

**Electric Motor Repair & Replacement Services**

<b>Section 1</b>	Reference Respondent Information	Please return completed form to:	
<b>FROM:</b>		<b>Bidder/Proposer:</b>	
<b>COMPANY:</b>		<b>Due Date:</b>	
<b>PHONE #:</b>		<b>Total # Pages:</b>	1
<b>FAX #:</b>		<b>Phone #:</b>	<b>Fax #:</b>
<b>EMAIL:</b>		<b>Bidder/Proposer E-Mail:</b>	

<b>Section 2</b>	Enter Bidder/Proposer Information, as applicable Similar Performed Project (Bidder/Proposer to enter details of a project performed for above reference respondent)		
<b>Bidder/Proposer Name:</b>			
<b>Reference Project Name:</b>	<b>Project Address:</b>	<b>Project Cost:</b>	
<b>Summarize Scope:</b>			

**You as an individual or your company has been given as a reference on the project identified above. Please provide your responses in section 3 below.**

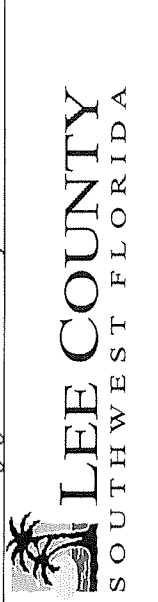
<b>Section 3</b>		Indicate: "Yes" or "No"
1. Did this company have the proper resources and personnel by which to get the job done?		
2. Were any problems encountered with the company's work performance?		
3. Were any change orders or contract amendments issued, other than owner initiated?		
4. Was the job completed on time?		
5. Was the job completed within budget?		
6. On a scale of one to ten, ten being best, how would you rate the overall work performance, considering professionalism; final product; personnel; resources. Rate from 1 to 10. (10 being highest)		
7. If the opportunity were to present itself, would you rehire this company?		
8. Please provide any additional comments pertinent to this company and the work performed for you:		

**Section 4**

Reference Name (Print)

Please submit non-Lee County employees as references

Reference Signature



## ALLEGED NEGLIGENCE OR BREACH OF CONTRACT DISCLOSURE FORM

Please fill in the form below. Provide each incident in regard to alleged negligence or breach of contract that has occurred over the past 10 years. Please complete in chronological order with the most recent incident on starting on page 1.

**Company Name:** \_\_\_\_\_

Type of Incident <i>Alleged Negligence or Breach of Contract</i>	Incident Date And Date Filed	Plaintiff <i>(Who took action against your company)</i>	Case Number	Court <i>County/State</i>	Project	Claim Reason <i>(initial circumstances)</i>	Final Outcome <i>(who prevailed)</i>

Make as many copies of this sheet as necessary in order to **provide a 10 year history** of the requested information. If there is no action pending or action taken in the last 10 years, complete the **company name and write "NONE" in the first "Type of Incident" box** of this page and return with your submission package. This form should also include the primary partners listed in your submission. Do not include litigation with your company as the plaintiff. Final outcome should include who prevailed and what method of settlement was made. If a monetary settlement was made the amount may remain anonymous. **Please do not modify this form (expansion of spacing allowed) or submit your own variation.**

Page Number: \_\_\_\_\_ Of \_\_\_\_\_ Total pages

Update the page number to reflect the current page and the total number of pages. Example: Page 3, of 5 total submitted pages of this form.



# LEE COUNTY

S O U T H W E S T F L O R I D A

## AFFIDAVIT PRINCIPAL PLACE OF BUSINESS

Instructions: Please complete all information that is applicable to your firm

Company Name: \_\_\_\_\_

Printed name of authorized signer \_\_\_\_\_

Title \_\_\_\_\_

⇒  
Authorized Signature \_\_\_\_\_

Date \_\_\_\_\_

The signer of this Affidavit guarantee, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made. **LEE COUNTY RESERVES THE RIGHT TO REQUEST SUPPORTING DOCUMENTATION, AS EVIDENCE OF SERVICES PROVIDED, AT ANY TIME.**

Notary:

State of \_\_\_\_\_

County of \_\_\_\_\_

The foregoing instrument was signed and acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_

20 \_\_\_\_\_ who has produced

\_\_\_\_\_ as identification (or personally known)

\_\_\_\_\_ Type of ID and number

⇒  
Notary Public Signature \_\_\_\_\_

Notary Commission Number and expiration \_\_\_\_\_

1. Principal place of business is located within the boundaries of: \_\_\_\_\_ Lee County  
\_\_\_\_\_ Collier County  
\_\_\_\_\_ Non-Local

Local Business Tax License # \_\_\_\_\_

2. Address of Principal Place of Business: \_\_\_\_\_

3. Number of years at this location \_\_\_\_\_ years

4. Have you provided goods or services to Lee County on a regular basis within the past 3 consecutive years \_\_\_\_\_ Yes\* \_\_\_\_\_ No \*If yes, attach contractual history for past 3 consecutive years

5. Number of available employees for this contract \_\_\_\_\_

6. Does your company have a Drug Free Workplace Policy \_\_\_\_\_ Yes \_\_\_\_\_ No

**SUB-CONTRACTOR LIST**

[illegible]

49

This form must be signed and sworn to in the presence of a notary public or other officer authorized to administer oaths.

1. This sworn statement is submitted to \_\_\_\_\_  
(Print name of the public entity)
- by \_\_\_\_\_  
(Print individual's name and title)
- for \_\_\_\_\_  
(Print name of entity submitting sworn statement)
- whose business address is \_\_\_\_\_
- (If applicable) its Federal Employer Identification Number (FEIN) is \_\_\_\_\_

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: On the attached sheet.) Required as per IRS Form W-9.

2. I understand that a "public entity crime" as defined in Paragraph 287.133(1) (g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including but not limited to, and bid or contract for goods or services to be provided to any public entity or agency or political subdivision or any other state or of the United States, and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1) (b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
4. I understand that "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
1. A predecessor or successor of a person convicted of a public entity crime:  
or:
  2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those offices, directors, executives, partners, shareholders, employees, members and agents who are active in the management of the affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not fair market value under an arm's length Agreement/Contract, shall be a facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
5. I understand that a "person" as defined in Paragraph 287.133(1) (c), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of the entity.
6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting those sworn statement. (Please indicate which statement applies.)

\_\_\_\_\_ Neither the entity submitted this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

\_\_\_\_\_ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, member, or agents who are active in management of the entity, or an affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

\_\_\_\_\_ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, member, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearing and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (Attach a copy of the final order)

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES, FOR CATEGORY TWO OR ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_

PERSONALLY APPEARED BEFORE ME, the undersigned authority, \_\_\_\_\_  
(Name of individual signing)

who, after first being sworn by me, affixed his/her signature in the space provided above on this \_\_\_\_\_ day  
of \_\_\_\_\_, 2\_\_\_\_\_.

\_\_\_\_\_  
(NOTARY PUBLIC)

My Commission Expires: \_\_\_\_\_

Signatory Authorization Affidavit



Lee County Procurement Management  
Signatory Authorization Affidavit

Date: June 18, 2018 Solicitation No.: B180244GWT

Solicitation Name: Electronic Motor Repair & Replacement Services

AUTHORIZATION: The following individuals are hereby authorized, as representatives of the Bidder/Proposer, identified below, to execute legally binding documents on behalf of the Bidder/Proposer. The signee of this Affidavit guarantees, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made. Lee County reserves the right to request supporting documentation, as evidence of services provided, at any time.

INSTRUCTIONS: This Authorization Affidavit shall only be executed by the following:

- Corporation: President
- LLC: Managing Member
- Sole Proprietor: Owner

Attach corporate designation documentation, if applicable.

Bidder/Proposer Name: \_\_\_\_\_

Authorized Signatory Name	Title

By execution of this document, I hereby authorize the individuals shown above to execute legally binding documents on behalf of the Bidder/Proposer. I further acknowledge that it shall be my responsibility to provide an updated Signatory Authorization Affidavit upon any change in authorization to the Lee County Procurement Management Department, Attention: Procurement Management Director, 1500 Monroe Street, 4<sup>th</sup> Floor, Fort Myers, FL 33901.

\_\_\_\_\_  
(Signature) (Title: President, Managing Member, Owner) (Date)

\_\_\_\_\_  
(printed name)

STATE OF \_\_\_\_\_  
COUNTY OF \_\_\_\_\_

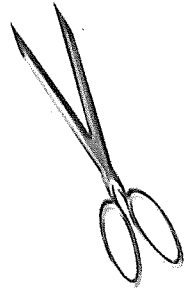
The foregoing instrument was signed and acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_  
20 \_\_\_\_\_ who produced the following as identification \_\_\_\_\_  
(type Identification and number or personally known)

\_\_\_\_\_  
Notary Public Signature Printed Name of Notary Public Commission Number/Expiration

*Sealed Bid Label*

**Cut along the outer border and affix this label to  
your sealed solicitation envelope to identify it as  
a "Sealed Bid".**

<b>SEALED BID DOCUMENTS • DO NOT OPEN</b>	
BID No.:	B180244GWT
BID TITLE:	<b>Electric Motor Repair &amp; Replacement Services</b>
DATE DUE:	<b>Monday, June 18, 2018</b>
TIME DUE:	<b>Prior to: 2:30 PM</b>
SUBMITTED BY:	 (Name of Company)
e-mail address	Telephone
<b>DELIVER TO:</b>	Lee County Procurement Management 1500 Monroe 4 <sup>th</sup> Floor Fort Myers FL 33901
<b><i>Note: submissions received after the time and date above will not be accepted.</i></b>	



Lee County Procurement Management  
1500 Monroe Street, 4<sup>th</sup> Floor  
Fort Myers, FL 33901  
(239) 533-8881  
[www.leegov.com/procurement](http://www.leegov.com/procurement)

**PLEASE PRINT CLEARLY**