



Advertise Date: Tuesday, March 22, 2022

Lee County Board of County Commissioners
DIVISION OF PROCUREMENT MANAGEMENT

INVITATION TO BID (B)

Solicitation No.: **B220124CMR**

Solicitation Name: **Electric Motor Repair and Replacement Services**

Open Date/Time: **Friday, April 22, 2022** Time: **2:30 PM**

Location: Lee County Procurement Management
2115 Second Street, 1st Floor
Fort Myers, FL 33901

Procurement Contact: **Carolina Rodriguez** Title **Procurement Analyst**

Phone: **(239) 533-8858** Email: **Crodriquez3@leegov.com**

Requesting Dept. **Utilities**

Pre-Bid Conference:

Type: **NON-Mandatory**

Date/Time: **4/1/2022 10:00 AM**

Location: **Administration Building
2115 Second Street 1st Floor
Fort Myers, FL 33901**

All solicitation documents are available for download at
www.leegov.com/procurement



Advertisement Date: 3/22/2022

Notice to Bidder

Invitation to Bid (B)

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

B220124CMR, Electric Motor Repair and 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 Friday, April 22, 2022

to the office of the **Procurement Management Director, 2115 Second Street, 1st Floor, Fort Myers, FL 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. Bidders who obtain Scope of Work/Specifications from sources other than 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. It is the bidder's responsibility to check for posted information. The County may not accept incomplete Bids.

A Non-Mandatory Pre-Bid Conference has been scheduled for the following time and location:

10:00 AM April 1, 2022 2115 Second Street, 1st Floor, Fort Myers, FL 33901.

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.

Carolina Rodriguez crodriguez3@leegov.com

Sincerely,

Adam Brooke, CPPB
Procurement Manager

*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 Ordinance 18-22
 - 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 Ordinance 18-22
 - 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. Additional sources may be utilized to determine credit worthiness and ability to perform.
- 6.1.2. 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.
- 6.1.3. Bidders are responsible for ensuring that any required background screening are conducted in accordance with Chapter 435. Bidders shall be aware, understand, and ensure compliance with the statutory requirements regarding background checks. FL Statutes Chapter 435 governs required background screenings for any employees, contractors, subcontractors, or agents of the Bidder who will have contact with any vulnerable person, as defined by statute, or who otherwise are required to undergo a Level 1 or Level 2 background screening in accordance with Florida law. Such requirements shall flow down to sub-contractors/consultants of the prime Bidder and prime Bidder shall ensure compliance with Chapter 435 of such parties.
- 6.1.3.1. Documentation of such completed background screenings must be maintained for a period of no less than five (5) years and are subject to audit by Lee County at any time during such five (5) year period.
- 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. 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 maybe declared non-responsible.**

16. DRUG FREE WORKPLACE

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

17. FLORIDA CERTIFIED ENTERPRISES

- 17.1. The County encourages the use of Florida Certified Enterprises such as such as Disadvantaged, Minority, Women, Veterans Business Enterprise (DBE, MBE, WBE, VBE) firms.
- 17.2. Bidder/Proposer is requested to indicate whether the Firm and/or any proposed sub-consultants are a Florida Certified Enterprise. Lee County encourages the utilization and participation of DBE, MBE, WBE, VBE or similar 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 Florida Certified Enterprises such as Disadvantaged, Minority, Women, Veterans Business Enterprise (DBE, MBE, WBE, VBE) firms and similar are encouraged to submit.

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. 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. Notice of Intended Decision is posted on the Lee County Department of Procurement Management website (www.leegov.com/procurement). Bidders are solely responsible to check for information regarding the Solicitation.
- 23.3. Refer to the “Procurement Protest” section of the Lee County Procurement Ordinance 18-22 for a complete description of the protest process and associated requirements. The ordinance 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 within seventy-two (72) hours of Posting of the Notice of Intended Decision.**
 - 23.4.1. The notice shall clearly indicate all grounds being claimed for the protest.
 - 23.4.2. The notice must be physically received by the Procurement Management Director within the required time frame described above. No additional time will be granted for mailing.
- 23.5. Following receipt of the Notice of Intent to File a Protest, a “**Protest Bond**” and “**Formal Written Protest**” must be filed **within ten (10) business days** of Posting of the Notice of Intended Decision.
- 23.6. **Failure to follow the protest procedures requirement within the time frames as prescribed herein and in the Lee County Procurement Ordinance 18-22 shall constitute a waiver of the right to protest and shall 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 for one (1) three-year (3) period. Upon mutual written agreement of both parties, the parties may renew the Agreement, in whole or in part, for a renewal term or terms not to exceed the initial Agreement term of three (3) years. The increments of renewal shall be at the sole discretion of the County as deemed in its best interest.**

- 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 responsive and responsible bid for a project exceeds the available funds the County may negotiate an adjustment of the bid price with the lowest responsive and responsible 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 responsible 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:**
- 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.leegov.com/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, Email**

at PRRCustodian@leegov.com or Visit
<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 Procurement Ordinance 18-22.

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. 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 bidder's 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. LOCAL VENDOR PREFERENCE

- 31.1. The Procurement Management Department will adhere to the Lee County Ordinance No. 00-10, as amended by Ordinance Nos. 08-26 and 17-16, and as may be amended from time to time (the County's "Local Vendor Preference"). It shall be at the discretion of the County Manager or Designee whether to apply Local Vendor Preference to any particular Solicitation.
- 31.2. The County's Local Vendor Preference, as it relates to Bidding preferences for local Vendors, is not applicable to Solicitations or Contracts when Commodities and/or Services may be provided in the event of an Emergency.
- 31.3. The County's Local Vendor Preference shall not apply in any procurement for Commodities or Services if the use of the Local Vendor Preference is prohibited by the terms of a grant or funding agreement or other prevailing law or policy.

32. INSURANCE (AS APPLICABLE)

- 32.1. 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

INSURANCE GUIDE



Lee County Insurance Requirements

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); or
 \$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:

- a. 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:

- **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.

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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. BID RESPONSE REQUIREMENTS

- 1.1. Vendor(s) must indicate total hourly rates. A wage rate for emergency and non-emergency jobs shall be indicated on Bid / Proposal Form 1a. This rate shall include all wage classifications involved and shall include all miscellaneous tools and small equipment needed to perform the job.
- 1.2. Vendor(s) must indicate the percentage markup from their procurement cost for parts and material used under this Agreement. Vendor(s) invoices for parts/materials shall be available for random audits to verify procurement costs.
- 1.3. Lee County reserves the right not to award certain items on the Bid / Proposal form, at the Procurement Management Director's discretion.
- 1.4. Lee County reserves the right to reject unbalanced quotes (a quote where a normally low-cost item is priced well out of the normal range).

2. FACILITY ACCESS

- 2.1. Lee County Utilities 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.

3. VENDOR REQUIREMENTS

- 3.1. Vendor must be a dealer, meaning vendor 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 and kept in stock to be sold to the public in the usual course of business.
- 3.2. Vendor shall have field services capabilities. Vendor must provide trained personnel and service vehicles in the removing and re-installing of all rotating equipment if required.
- 3.3. Vendor must own or lease crane with minimum 20-ton lifting capacity. Vendor shall provide documentation that the crane operator has attended safety classes on crane operation.
- 3.4. Vendor must provide personnel and service vehicles for vibration analysis, 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 predictive maintenance services. A hard copy of the results shall be furnished with each repair.
- 3.5. Vendor shall supply 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, however panels must be built to County specifications in a U.L. 508 panel facility. Subcontracting U.L Listed Control Panel will be allowed.
- 3.6. Vendor must maintain a motor inventory of 30HP and lower. Vendor should have 2 of each motor size in stock. Vendor must submit a copy to Lee County Utilities Department, of inventory prior to execution of contract. List of motors included on Form 8 on this solicitation.
- 3.7. Vendor shall be responsible for performing all work. No subcontracting of any repair work will be allowed. All windings shall be performed at Vendor's facility. The purchasing of form wound coils will be allowed.
- 3.8. Vendor shall have at least (3) employees dedicated to the County Agreement, this includes (1) in the shop and (2) in the field. Each employee assigned shall have a minimum of (3) years of experience. The experience may be

verified by the County at any point during the term of the Agreement and shall be verified via employment dates of companies that the employee has worked at utilizing their trade skills.

3.9. Vendor shall hold a UL674 shop certification/Notice of Completion and Authorization to apply UL Mark at time of award and maintain a UL674 shop certification throughout the term of the Agreement.

4. INVOICING

4.1. Vendor shall provide a sample invoice with their bid submission. At a minimum, invoice shall include the following items:

- County work order, purchase order or contact number.
- Name and address of the location/facility where the work was performed.
- Description of work being performed and when work started and completion date.
- Must identify equipment worked on, such as: lift station number, pump number, serial number, horsepower, manufacturer, etc.
- For regular hourly labor rates, invoices shall include name of the technician, classification, work performed, hourly rate established in contract, total hours worked, and extended amount.
- For emergency hourly labor rates, invoices shall include name of the technician, classification, work performed, hourly rate established in contract, total hours worked, and extended amount.
- For repair parts and components, invoices shall include item description, quantity, unit price, mark up price, and extended amount.
- For replacement equipment (supplied and installed), invoices shall include item description, quantity, manufacturer, model number, serial number, location where delivered or installed, unit price, mark up price and extended amount.
- For miscellaneous items- i.e., overnight freight, pick-up or delivery charges, consumables, etc., invoices shall indicate such items as a separate line item. Such charges shall be pass-through fees and shall not have markup applied.

4.2. For any charges not provided for in the contract nor allocated as material charges, the County reserves the right to request and verify such charges as deemed in its best interest.

End of Special Conditions Section

SCOPE OF WORK AND SPECIFICATIONS

1. GENERAL SCOPE OF WORK

- 1.1. The Lee County Board of County Commissioners seeks to contract with a qualified Vendor(s) to provide all necessary labor, materials, and equipment to service electric motor repair work (both in the field and in their shop). 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, rotating equipment, technical support, substantial inventory, panel shop capabilities and the ability to retrofit wells from existing turbine motors to submersible motors.

2. RESPONSE TIME/ EMERGENCY SERVICES

- 2.1. Vendor must be on site no more than four (4) hours after initial contact has been made by Lee County Utilities. This includes providing necessary equipment when applicable.
- 2.2. Vendor shall provide emergency repair service on (24) hours, (7) days a week, basis including holidays when requested by Lee County Utilities representative.
- 2.3. Emergency status or categorization for purpose of this Agreement shall be at the discretion of the County Department authorizing work to be completed.
- 2.4. Vendor shall respond to emergency calls within (1) hours or less and reach Lee County facility within (2) hours or less.
- 2.5. Lee County reserves the right to purchase the product or service listed in this Agreement elsewhere in an emergency.

3. REMOVAL AND TRANSPORT OF MOTORS

- 3.1. Vendor shall remove and/or install any motors, including all electrical, control and mechanical connections, at the appropriate hourly rate plus crane rate, if necessary.
- 3.2. Vendor shall pick up equipment for repair within 24 hours from receiving verbal or written communication by Lee County Utilities representative, including normal/business hours, weekends and holidays. Under emergency conditions the Vendor shall respond within 4 hours from receiving notification from Lee County Utilities representative.

4. HAZARDOUS LOCATIONS

- 4.1. Motors intended for use in hazardous locations shall 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.

5. WARRANTY

- 5.1. At a minimum, the awarded Vendor(s) 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.
- 5.2. Vendor(s) shall provide Lee County Utilities, all installation, operation, and maintenance manuals for all new equipment supplied and / or installed, along with all warranties.

6. AUTHORIZATION TO PERFORM WORK

6.1. Upon award Lee County Utilities will provide contractor a list of Lee County Utilities employees empowered to authorize work.

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TECHNICAL SPECIFICATIONS

1. ELECTRIC MOTOR STANDARDS

- 1.1. This Motor 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. Not all repair situations can be covered in this Motor Repair Specification. In the absence of specific instructions, the requirement shall be to restore the motor to as- manufactured condition.
- 1.3. The following standards (or latest version) are to be used in conjunction with these Motor Repair Specifications:
 - UL674 Electric Motors and Generators for use in Hazardous Locations
 - EASA AR100-2020 Recommended Practice for the Repair of Rotating Electrical Apparatus
 - ISO 1940-1, Mechanical Vibration
 - NEMA Std. MG-1, Motors and Generators
 - ABMA Std. 7, Shaft and Housing Fits for Metric Radial Bearings

2. GENERAL REPAIRS AND PROCEDURES

- 2.1. **Unavoidable Degradation:** While conducting a 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.
- 2.2. **Operating Environment:** If motor operates in severe environmental conditions, it shall 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 originally built.
- 2.3. **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 must be used.
- 2.4. **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 Lee County Utilities Department to be contacted about the repair. The form shall be used as a guide for the repair. (A sample form is included on page 29 of this solicitation package).
 - 2.4.1. During repair, actions and findings will be recorded on repairer's tracking form. It shall contain record of all the work done, problems noted, check 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 within this document.
- 2.5. **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.
- 2.6. **File:** The repairer must keep a copy of the motor repair form in their file for a particular job for up to 2 years.
- 2.7. **Inspections:** Vendor shall conduct initial tests to determine and record the probable cause of failure, if any, to document certain pre-repair parameters, and to determine what work is required.

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

2.8. **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 must be recorded.

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

2.10. **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.

3. DISMANTLING

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.

3.2. **Markings:** End brackets and frames shall be clearly match-marked with numerals or letters.

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.

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.

3.5. **Ceramic Bearings:** Ceramic bearings will be used for high-speed motors that produce high noise levels.

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

3.7. **Explosion Proof:** Repairer 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, Lee County Utilities Department shall be notified before proceeding with repair.

3.8. **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.

4. VERTICAL MOTORS

4.1. 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.
- Any other features of the motor configuration.

5. WINDING REMOVAL

- 5.1. **General:** For motors that are to be rewound, the core shall be stripped, cleaned, tested, and repaired.
- 5.2. **Take Data:** Winding data shall be recorded to permit replicating original configuration.
- 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 damage 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.
- 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.
- 5.5. **Aluminum Frame:** Frames may be chemically stripped if burnout facilities are not available. Other methods of stripping may only be used with Lee County Utilities Department's approval.

6. CORE PREPARATION

- 6.1. **Cleaning:** The stripped core shall be cleaned of all foreign material, such as insulation debris, and dried.
- 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 Lee County Utilities Department before proceeding further.
- 6.3. **Method of Repair:** The method of repair to damaged cores shall be discussed with Lee County Utilities Department 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.
- 6.4. **Core loss test:** A final core loss test shall be done as described in sub-section 5.3.

7. REWINDS

- 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 Lee County Utilities Department.
- 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.
- 7.3. **Sensors:** Temperature sensing devices shall be replaced with devices comparable to those previously used.

- 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.
- 7.5. **Insulation Materials:** Insulation shall include, as a minimum, the following components:
- Turn insulation – Multiple build coating turn insulation of polyimide or a combination of both over polyester and 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).
 - Phase barriers – Phase barriers between end turns of different phases (these shall be trimmed to permit clear airflow).
- 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.
- 7.7. **Connections:** All connections shall be brazed with material that will not be subject to corrosion in the specified operating environment. They shall have no sharp edges and shall be insulated.
- 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.
- 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.

8. ROUTINE OVERHAULS

- 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, correct to a 400C reference temperature per IEEE 43, is 20 megohms. Levels less than 20 megohms shall be discussed with the Lee County Utilities Department.
 - 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 Apparatus or other standards approved by Lee County Utilities Department.
- 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.

8.2.1. 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.

8.2.2. 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.

8.3. **Repairs:** After satisfactory insulation resistance has been attained, all loose or damaged wedges, slot sticks, coils support etc., shall be replaced or repaired.

8.3.1. 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 sealed durable finish to the insulation. The repairer shall notify Lee County Utilities Department if a dip-and-bake is undesirable.

8.4. **Other:** The routine overhaul of other parts of the motor shall return the parts to good condition.

8.4.1. The assembly of the motor after overhaul is covered in sub-section 16, Reassembly.

9. **ROTOR TEST AND REAIR**

9.2. **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.

9.2.1. 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.

9.2.2. 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 examinations.
- Ultrasonic examination of the bars and end rings.
- Core loss tests (axial current through shaft).

9.3. **Fabricated Cage Repair:** 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 Lee County Utilities Department's approval. Any parts that are to be reused shall be cleaned and examined for defects.

9.4. **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 Lee County Utilities Department's approval. Any parts that are to be reused shall be cleaned and examined for defects.

9.5. **Joint Testing:** After fabrication, the joints shall be examined and tested by ultrasonic or comparable means.

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

9.7. **Cast Rotor Repair:** A defective cast cage shall not be repaired without prior authorization from Lee County Utilities Department. 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.

- 9.8. **Iron Repairs:** Due to cost involved, this work shall be done without prior approval from Lee County Utilities Department. If tests or observation indicate that the laminations have been damaged, they shall be repaired or replaced with new laminators. Care shall be taken to ensure a consistent air gap.

10. SHAFT REPAIR

- 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 Lee County Utilities Department prior to proceeding.
- 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 Lee County Utilities Department.
 - Tolerances - Shaft extension dimension tolerances shall be within the limits specified in NEMA MG-1, Motors and Generators sections.

11. ANTI-FRICTION BEARINGS

- 11.1. **New Bearings:** Anti-friction bearings shall always be replaced. New bearings shall be SKF brand, unless otherwise approved by Lee County Utilities Department. 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 Lee County Utilities Department.
- 11.2. **Shielding and Sealing:** If the method of shielding, sealing or lubricating is to be changed, it shall be approved by Lee County Utilities Department.
- 11.3. **Clearance:** Unless otherwise specified by the manufacturer or Lee County Utilities Department, C3 clearance bearings shall be used for all bearings.
- 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.)
- 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.
- 11.6. **Grease:** Greaseable bearings shall be lubricated as specified in the EASA Recommended Practice for the Repair of Rotating Electrical Apparatus or other standards approved by Lee County Utilities Department.
- 11.6.1. 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 Lee County Utilities Department's lubricant and the lubricant packed by the bearing manufacturer.

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 shall be visible from the lamp filament. (Reference IEEE 112-2017, section 9.4.3. or EASA AR100-2020) or most current.

12. END BRACKETS

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

12.2. **Tolerances:** See section 11.4. for the fit of the outer diameter of anti-friction bearings to housings.

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.

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

13. OTHER DEVICES

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

13.1.1. 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 Lee County Utilities Department. Welding to the shaft is not permitted.

13.1.2. Repairs to fans shall only be done after discussion with Lee County Utilities Department.

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

13.1.4. 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.

14. TEMPERATURE SENSORS

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

14.2. 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.

14.3. Sensor type shall be the same as the original and will usually be located in the end turns.

14.4. **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.

14.4.1. 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.

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

14.5. **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.

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

14.6.1. They shall be tested for correct functioning.

14.7. **Vibration Sensors:** Vibration sensors shall be replaced in their original locations.

15. BALANCING

15.1. 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.

16. REASSEMBLY

16.1. 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 14.2.)
- 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.

17. FINAL TESTS

17.1. **Insulation:** Prior to running, the motor shall be given an insulation resistance test to ground in the following manner:

17.1.1. 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 Lee County Utilities Department. 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.

17.2. **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 - 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.

QUALITY CONTROL

18. INSTRUMENTS

18.1. **Calibration:** All measuring instruments shall be calibrated regularly. The calibration records shall be available for Lee County Utilities Department's inspection. Minimum frequency of calibration shall be annually.

18.1.1. Insulation Testers- Insulation resistance testers—every six months to a known resistance.

18.1.2. Dimension Meters - Micrometers, vernier calipers and other dimension measuring devices—every six months against a minimum grade AA gauge block set.

18.1.3. Bore Gauges - Bore gauges shall be calibrated to a certified standard before and after each use.

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

19. MATERIALS

19.1. **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.

19.2. **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.

19.3. **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.

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

19.4. **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 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.

20. TESTS AND INSPECTION DURING WORK

- 20.1. **Testing and Inspection 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 2 years from date of repair.

21. FREQUENCY NOISE TESTS

- 21.1. Services provided to troubleshoot and analyze in Field motors that are emitting high or low noise frequencies while running with normal loads. Any motor operation emitting high or low frequency noise levels that are unacceptable must be analyzed and the problem pinpointed so it can be corrected.

22. FINAL INSPECTION AND TEST

- 22.1. 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.
- 22.2. 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.
- 22.3. All final inspection and test results shall be sent, in their original form, to the designated contact person.

End of Scope of Work and Specifications Section

Motor Repair Form

Repairer:			Date:	
Motor:	Facility	Dept.	Process	Description
Designation:		Type	Speed:	Power:
Manufacturer:	Volts:	Amperes:		Frame:
Serial #:		Bea Rep by (mfg)	rings: lace w/bearing	Lubricant Grade:
Other:				
Service:			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				
Contact:			Phone:	
Reference:				

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.

Form #	Title/Description
1	<p><i>Solicitation Response Form</i></p> <p>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.</p> <p>Verify that all Addenda and tax identification number have been provided.</p>
1a	<p><i>Bid/Proposal Form</i></p> <p>This form is used to provide itemization of project cost. A more detailed "schedule of values" may be requested by the County.</p>
*	<p><i>Business Relationship Disclosure Requirement</i></p> <p>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.</p> <p>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.</p>
2	<p><i>Affidavit Certification Immigration Laws</i></p> <p>Submission of this form constitutes acknowledgement that the Bidder is in compliance in regard to all applicable immigration laws.</p>
3	<p><i>Reference Survey</i></p> <p>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)</p> <ol style="list-style-type: none"> 1. Section 1: Bidder/Proposer to complete with <u>reference respondent's</u> 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 <u>reference respondent</u> 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/Consultant List*

To be completed and returned when sub-contractors/consultants 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 *Vendor Requirements*

The County shall require that Vendor must provide the services described herein, in conjunction with their motor repair capabilities. Vendor must indicate below whether you can comply (yes) or cannot comply (no).

***** *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)



LEE COUNTY PROCUREMENT MANAGEMENT
SOLICITATION RESPONSE FORM

Date Submitted: Bid Due Date: 4/22/2022

SOLICITATION IDENTIFICATION: B220124CMR

SOLICITATION NAME: Electric Motor Repair and Replacement Services

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 NUMBER:

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 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**

Disadvantaged, Minority, Women, Veterans Business Enterprise (DBE, MBE, WBE, VBE) Yes No
4 Proposer? If yes, please attach a current certificate.

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

Company Name <i>(Name printed or typed)</i>	<div style="border: 1px solid black; width: 100%; height: 100%;"></div>
Authorized Representative Name <i>(printed or typed)</i>	(Affix Corporate Seal, as applicable)
Authorized Representative's Title <i>(printed or typed)</i>	Witnessed/Attested by: <i>(Witness/Secretary name and title printed or typed)</i>
Authorized Representative's Signature	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.

Bidders may not adjust or modify data provided within the Bid Schedule. Bids received with modified data may deem the Bidder as non-responsive and ineligible for award.

Detail by Entity Name

Florida Profit Corporation

Bill's Widget Corporation

Filing Information

Document Number	655555
FB/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

555 N Main Street
Your Town, USA 99999

Changed 02/11/2012

Verify either Principal or Mailing address is on Form 1

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
President, First 555 AVENUE Anytown, USA99999	Title P 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.
Title V President, Second 555 AVENUE Anytown, USA99999	

v01/03/2018



PROCUREMENT MANAGEMENT DEPARTMENT BID/PROPOSAL FORM

COMPANY NAME: _____

SOLICITATION: B220124CMR, Electric Motor Repair and Replacement Services

Having carefully examined the Contract Documents, Contractor/Vendor proposes to furnish the following which meeting these specifications.

PRICING

Pricing shall be inclusive of all labor, equipment, supplies, overhead, profit, material, and any other incidental costs required to perform and complete all work as specified in the Contract Documents. All Unit Prices will be bid at the nearest whole penny.

In the event there is a discrepancy between a subtotal or total amount and the unit prices and extended amounts, the unit prices will prevail and the corrected extension(s) and total(s) will be considered the price.

The County will only accept bids submitted on bid forms provided by the County. Bids submitted on other forms, other than those provided by the County, will be deemed non-responsive and ineligible for award.

Electric Motor Repair and Replacement Services

Hourly Rates- Straight Time (Basis of Award)

Item	Description	Unit of Measure	Estimated Quantity	Unit Price	Extended Amount
1	Field Service Technicians	Hours	600	\$	\$
2	In-House Shop Technicians	Hours	300	\$	\$
3	Technical Specialists	Hours	225	\$	\$
4	Shop Coordinators	Hours	225	\$	\$
5	Welders	Hours	175	\$	\$
6	Machinists, Lathe Operators	Hours	100	\$	\$
7	Crane 20 Ton with 75 Foot Reach	Hours	50	\$	\$
8	Two Man Crane Crew	Hours	50	\$	\$
9	Transportation for Field Service Personnel	Hours	50	\$	\$
10	Specialty Service Classification (Laser Alignment, Vibration Analysis)	Hours	50	\$	\$

Mark- ups

Item	Description	Unit of Measure	Estimated Quantity	% of Mark Up	Extended Amount
10	Repair Component Mark Up (Annual Expense \$100,000)	Dollars	100,000	%	\$
11	New Equipment (Annual Expense \$150,000)	Dollars	150,000	%	\$
12	Miscellaneous Items: e.g., overnight freight on special parts, consumables, etc.	Cost Plus a 0% Markup			

BID SUMMARY

PROJECT TOTAL (Straight Time + Mark Ups) \$

***Quantities are not guaranteed. Final payment will be based on actual quantities.*

PROJECT TOTAL:

(Use Words to Write Total)

*Bid/Proposal Form Continued***Hourly Rates- Overtime (Reference Only)**

Item	Description	Unit of Measure	Estimated Quantity	Unit Price	Extended Amount
1	Field Technicians	Hours	75	\$	\$
2	In-House Shop Technicians	Hours	75	\$	\$
3	Technical Specialists	Hours	75	\$	\$
4	Shop Coordinators	Hours	75	\$	\$
5	Welders	Hours	75	\$	\$
6	Machinists, Lathe Operators	Hours	75	\$	\$
7	Crane 20 Ton with 75 Foot Reach	Hours	50	\$	\$
8	Two Man Crane Crew	Hours	50	\$	\$
9	Transportation for Field Service Personnel	Hours	50	\$	\$
10	Specialty Service Classification (Laser Alignment, Vibration Analysis)	Hours	50	\$	\$



AFFIDAVIT CERTIFICATION IMMIGRATION LAWS

SOLICITATION NO.: **B220124CMR** SOLICITATION NAME: **Electric Motor Repair and 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.** PROPOSER ATTESTS THAT THEY ARE FULLY COMPLIANT WITH ALL APPLICABLE IMMIGRATION LAWS (SPECIFICALLY TO THE 1986 IMMIGRATION ACT AND SUBSEQUENT AMENDMENTS).

BY REGISTERING AS A VENDOR, SUBMITTING A RESPONSE TO A SOLICITATION, OR ENTERING INTO A CONTRACT, YOU ARE OBLIGATED TO COMPLY WITH THE PROVISIONS OF SECTION 448.095, FLA. STAT., "EMPLOYMENT ELIGIBILITY." FURTHER, BY YOUR REGISTRATION AS A VENDOR, RESPONSE TO A SOLICITATION, ENTERING INTO A CONTRACT, YOU AFFIRM AND REPRESENT THAT YOU ARE REGISTERED WITH THE E-VERIFY SYSTEM AND ARE USING SAME, AND WILL CONTINUE TO USE SAME AS REQUIRED BY SECTION 448.095, F.S. COMPLIANCE WITH SECTION 448.095 INCLUDES, BUT IS NOT LIMITED TO, UTILIZATION OF THE E-VERIFY SYSTEM TO VERIFY THE WORK AUTHORIZATION STATUS OF ALL NEWLY HIRED EMPLOYEES, AND REQUIRING ALL SUBCONTRACTORS TO PROVIDE AN AFFIDAVIT ATTESTING THAT THE SUBCONTRACTOR DOES NOT EMPLOY, CONTRACT WITH, OR SUBCONTRACT WITH, AN UNAUTHORIZED ALIEN. FAILURE TO COMPLY WILL LEAD TO TERMINATION AS A VENDOR, DISQUALIFYING YOU FOR AWARD OF A SOLICITATION, DENIAL OF ENTERING INTO A CONTRACT AND/OR, CANCELLATION OF AN ACTIVE CONTRACT, OR IF YOUR SUBCONTRACTOR KNOWINGLY VIOLATES THE STATUTE, THE SUBCONTRACT MUST BE TERMINATED IMMEDIATELY. ANY CHALLENGE TO TERMINATION UNDER THIS PROVISION MUST BE FILED NO LATER THAN 20 CALENDAR DAYS AFTER THE DATE OF TERMINATION. IF TERMINATED FOR A VIOLATION OF THE STATUTE BY THE VENDOR, THE VENDOR MAY NOT BE ALLOWED TO DO BUSINESS WITH THE COUNTY OR BE AWARDED A SOLICITATION OR CONTRACT FOR A PERIOD OF 1 YEAR AFTER THE DATE OF TERMINATION. ALL COSTS INCURRED TO INITIATE AND SUSTAIN THE AFOREMENTIONED PROGRAMS SHALL BE THE RESPONSIBILITY OF THE VENDOR.

Company Name: _____

Signature Title Date

STATE OF _____
COUNTY OF _____

The foregoing instrument was signed and acknowledged before me, by means of physical presence or online notarization, this _____ day of _____, 20____, by _____ who has produced _____ 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.**

**Lee County Procurement Management
Reference Survey**

Reference surveys submitted can be a maximum of twelve (12) months old. If using a previous reference, Proposers must clearly identify the project name and number the reference is being submitted for.

Project Name & Number: _____

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

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

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.

Section 3	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	Please submit non-Lee County employees as references
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Reference Name (Print Name) _____

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.



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 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.**

The foregoing instrument was signed and acknowledged before me, by means of physical presence or online notarization, this _____ day of _____ 20____, by _____ who has produced _____ as identification.
(Type of Identification and Number)

Notary:
State of _____
County of _____

⇒ _____
Notary Public Signature

Notary Commission Number and expiration

- Principal place of business is located within the boundaries of: _____ Lee County
_____ Collier County
_____ Non-Local
- Local Business Tax License # _____
- Address of Principal Place of Business: _____
- Number of years at this location _____ years
- 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
- Number of available employees for this contract _____
- Does your company have a Drug Free Workplace Policy _____ Yes _____ No

Form 6-Sub-contractor/consultant List



SUB-CONTRACTOR/CONSULTANT LIST

Sub-Contractor/Consultant Company Name	Area of Work	Point of Contact Or Project Supervisor	Contact Info Phone or Email	Qualified DBE, MBE, WBE, VBE or Similar	Amount or Percentage of Total

Please include sub-contractor/consultant name, area of work (i.e., mechanical, electrical, etc.) and a **valid** phone number and/or email. Also include the dollar value or percentage that the sub-contractor/consultant will be performing. If sub-contractor/consultant qualifies as a current certificate Florida Certified Business Enterprise such as MBE, WBE, DBE, VBE or similar please indicate such above and provide proof of certification.

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.

Form 7: Public Entity Crime Form

_____ 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 _____

Sworn to (or affirmed) and subscribed before me, by means of physical presence or online notarization, 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



VENDOR REQUIREMENTS
FOR

B220124CMR, Electric Motor Repair and Replacement Services

The County reserves the right, in their sole judgment, to determine to its satisfaction whether the Vendor(s)/Contractor(s)/Proposer(s) has submitted document requirements as specified herein. The determination shall be based upon the examination of submittals/ documents form and associated supportive documentation (if any requested).

The County shall require that Vendor must provide the services described herein, in conjunction with their motor repair capabilities. Vendor must indicate below whether you can comply (yes) or cannot comply (no).

An affirmative determination shall be a prerequisite for award of the contract to the Vendor(s)/Contractor(s)/Proposer(s). A negative determination shall result in disqualification of the proposal, in which event the County shall exclude the proposal from the evaluation or consideration process and therefore deeming the Bidder(s)/Proposer(s) ineligible for award.

The County reserves the right to inspect and verify compliance as to the items listed below.

1. Vendor Requirements

Does your firm own or lease a crane with a minimum 20-ton lifting capability? If YES, please provide purchase or lease agreement.	YES	NO
Did your firm provide documentation that shows your crane operator has attended safety classes on crane operation?	YES	NO
Does your firm own and maintain an IR Data Pac 1500 and Fixture Laser or equivalent to perform predictive services?	YES	NO
Does your firm have the ability to design, engineer, fabricate and install an U.L. Listed Control Panel? (Panel must be built to County specifications in U.L. 508 Panel facility)	YES	NO
Can your firm have a response time of a minimum of 4 hours?	YES	NO
Can your firm provide access to Lee County Utilities representative access to repair facility during repairs for purposes of checking progress of repairs?	YES	NO
Can your firm provide access to Lee County Utilities representative access to repair facility prior to award for inspection? If YES, please provide repair shop address. _____ _____	YES	NO
Can your firm hold a UL674 shop certification/Notice of Completion and Authorization to Apply UL Mark at time of award? (Firm should also maintain this certification throughout the term of the Agreement.	YES	NO

2. **Inventory**

Can your firm maintain a motor inventory of 30HP and lower? Shall have 2 of each HP.

YES

NO

If YES, please provide inventory list of motor list below.

- Failure to provide evidence of motor inventory may deem your firm non-responsive.

<u>MOTOR SIZE</u>	<u>INVENTORY</u>
1/3 HP	
1/2 HP	
1/4 HP	
1 HP	
1.5 HP	
3 HP	
5 HP	
7.5 HP	
10 HP	
15 HP	
20 HP	
25 HP	
30 HP	

Authorized Bidder/Proposer Signature

Date:

Authorized Bidder/Proposer Name (Print or Type)

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

SEALED BID DOCUMENTS • DO NOT OPEN	
BID NO.:	B220124CMR
BID TITLE:	Electric Motor Repair and Replacement Services
DATE DUE:	Friday, April 22, 2022
TIME DUE:	Prior to: 2:30 PM
SUBMITTED BY:	_____ (Name of Company)
e-mail address	Telephone
DELIVER TO:	Lee County Procurement Management 2115 Second Street, 1st Floor Fort Myers, FL 33901



***Notice:** The Date Due/Bid Due Date/Opening Date as stated on this label and other forms contained herein may have been updated via issuance of Addenda against this project. It is the sole responsibility of the Contractor/Vendor to monitor the County project webpage for any updates to the Date Due/Bid Due Date/Opening Date via Addenda. This label nor other original forms may not be updated. Contractor/Vendor may strike through and update Date Due/Bid Due Date/Opening Date at their discretion to match any updates to this date that have been published via Addenda.

Submission received after the time and date of the Date Due/Bid Due Date/Opening Date will not be accepted at the sole discretion of the County.

PLEASE PRINT CLEARLY