



PROJECT NO.: B-130513

OPEN DATE: August 6, 2013

AND TIME: 2:30 P.M.

**MANDATORY**

PRE-BID DATE: July 23, 2013

AND TIME: 10:00 A.M.

LOCATION: Lee County Procurement Management  
1825 Hendry Street, 3<sup>rd</sup> Floor  
Fort Myers, FL 33901

# REQUEST FOR BID

**TITLE: ELECTRIC MOTOR REPAIR &  
REPLACEMENT SERVICES**

**Advertised Date: July 5, 2013**

REQUESTER: LEE COUNTY BOARD OF COUNTY COMMISSIONERS  
DIVISION OF PROCUREMENT MANAGEMENT

**MAILING ADDRESS**

P.O. BOX 398  
FORT MYERS, FL 33902-0398

**PHYSICAL ADDRESS**

1825 Hendry St 3<sup>rd</sup> Floor  
FORT MYERS, FL 33901

**PROCUREMENT CONTACT:**

NAME : PATRICK T. LEWIS SR.  
TITLE: PROCUREMENT ANALYST  
PHONE NO.: (239) 533-5453  
EMAIL: [Plewis@leegov.com](mailto:Plewis@leegov.com)

**GENERAL CONDITIONS**

Sealed Bids will be received by the DIVISION OF PROCUREMENT MANAGEMENT, until the time and date specified on the cover sheet of this “Request for Bid”, and opened immediately thereafter by the Director or designee.

Any question regarding this solicitation should be directed to the Procurement Division Contact listed on the cover page of this solicitation, or by calling the Division of Procurement Management at (239) 533-5450.

1. **SUBMISSION OF BID:**

- a. Bids must be sealed in an envelope, and the outside of the envelope must be marked with the following information:
  - 1. Marked with the words “Sealed Bid”
  - 2. Name of the firm submitting the bid
  - 3. Title of the bid
  - 4. Bid number
- b. The Bid must be submitted in duplicate as follows:
  - 1. The original consisting of the Lee County bid forms completed and signed, and where applicable corporate and/or notary seals attached.
  - 2. A copy of the original bid forms for the Director.
- c. The following must be submitted along with the bid in a separate envelope. This envelope must be marked as described above, but instead of marking the envelope as “Sealed Bid”, please indicate the contents; i.e., literature, drawings, submittals, etc. This information must be submitted in duplicate.
  - 1. Any information (either required or in addition to that asked for by the specifications) necessary to analyze your bid; i.e., required submittals, literature, technical data, financial statements.
  - 2. Warranties and guarantees against defective materials and workmanship.
- d. **BIDS RECEIVED LATE:** It is the bidder’s responsibility to ensure the bid is received by the Division of Procurement Management prior to the opening date and time specified. Any bid received after the opening date and time will be promptly returned to the bidder unopened. Lee County will not be responsible for bids received late because of delays by a third party delivery service; i.e., U.S. Mail, UPS, Federal Express, etc.
- e. **BID CALCULATION ERRORS:** In the event there is a discrepancy between the total quoted amount or the extended amounts and the unit prices quoted, the unit prices will prevail and the corrected sum will be considered the quoted price.
- f. **PAST PERFORMANCE:** All vendors will be evaluated on their past performance and prior dealings with Lee County (i.e., failure to meet specifications, poor workmanship,

late delivery, etc.). Poor or unacceptable past performance may result in bidder disqualification.

- g. **WITHDRAWAL OF BID:** No bid may be withdrawn for a period of 90 days after the scheduled time for receiving bids. A bid may be withdrawn prior to the bid-opening date and time. Such a request to withdraw must be made in writing to the Director, who will approve or disapprove of the request.
- h. **COUNTY RESERVES THE RIGHT:** The County reserves the right to exercise its discretion, to waive minor informalities in any bid; to reject any or all bids with or without cause; and/or to accept the bid that in its judgment will be in the best interest of the County of Lee.
- i. **EXECUTION OF BID:** All bids shall contain the signature of an authorized representative of the bidder in the space provided on the quote proposal form. All bids shall be typed or printed in ink. The bidder may not use erasable ink. All corrections made to the bid shall be initialed.

2. **ACCEPTANCE**

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. In the event the materials and/or services supplied to the County are found to be defective or do not conform to specifications, the County reserves the right to cancel the order upon written notice to the seller and return such product to the seller at the seller's expense.

3. **SUBSTITUTIONS**

Whenever in these specifications a brand name or make is mentioned, it is the intention of the County only to establish a grade or quality of materials and not to rule out other brands or makes of equal quality. However, if a product other than that specified is bid, it is the vendor's responsibility to name such product with his bid and to prove to the County that said product is equal to the product specified. Lee County **shall** be the sole judge as to whether a product being offered by the bidder is actually equivalent to the one being specified by the detailed specifications. (Note: This paragraph does not apply when it is determined that the technical requirements of this solicitation will require a specific product only, as stated in the detailed specifications.)

4. **RULES, REGULATIONS, LAWS, ORDINANCES & LICENSES**

The awarded vendor shall observe and obey all laws, ordinances, rules, and regulations, of the federal, state, and local government, which may be applicable to the supply of this product or service. The awarded vendor has attested to compliance with the applicable immigration laws of the United States in the attached affidavit. Violations of the immigration laws of the United States shall be grounds for unilateral termination of the awarded agreement.

- a. Local Business Tax – Vendor shall submit within 10 calendar days after request.
- b. Specialty License(s) – Vendor shall possess at the time of the opening of the bid all necessary permits and/or licenses required for the sale of this product and/or

service and upon the request of the County will provide copies of licenses and/or permits within 10 calendar days after request.

- c. The geographic preference established in the Local Vendor Preference ordinance is applicable to all Lee County procurement activities unless otherwise specifically noted in the solicitation package. Provided, however, the Local Vendor Preference ordinance is not applicable to procurement activity or solicitations involving Federal Transit Administration grant funds.
- d. Florida Statutes Section 607.1501 (1) states: A foreign corporation may not transact business in this state until it obtains a certificate of authority from the Department of State.

5. **WARRANTY/GUARANTY** (unless otherwise specified)

All materials and/or services furnished under this bid shall be warranted by the vendor to be free from defects and fit for the intended use.

6. **PRE-BID CONFERENCE**

A pre-bid conference will be held at the location, date, and time specified on the cover of this solicitation. Pre-bid conferences are generally non-mandatory, but it is highly recommended that everyone planning to submit a bid attend.

In the event a pre-bid conference is classified as mandatory, it will be so specified on the cover of this solicitation and it will be the responsibility of the bidder to ensure that they are represented at the pre-bid. Only those bidders who attend the pre-bid conference will be allowed to bid on this project.

7. **LEE COUNTY PAYMENT PROCEDURES**

All vendors are requested to mail an original invoice to:

Lee County Finance Department  
Post Office Box 2238  
Fort Myers, FL 33902-2238

All invoices will be paid as directed by the Lee County payment procedure unless otherwise differently stated in the detailed specification portion of this bid.

Lee County will not be liable for requests for payment deriving from aid, assistance, or help by any individual, vendor, or bidder for the preparation of these specifications.

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 contractors or bidders should include in their bid all sales or use taxes, which they will pay when making purchases of material or subcontractor's services.

8. **LEE COUNTY BID PROTEST PROCEDURE**

Any contractor/vendor/firm that has submitted a formal bid/quote/proposal to Lee County, and who is adversely affected by an intended decision with respect to the award of the formal bid/quote/proposal, must file a written "Notice of Intent to File a Protest" with the Lee County

Procurement Management Director not later than seventy-two (72) hours (excluding Saturdays, Sundays and Legal Holidays) after receipt of the County's "Notice of Intended Decision" with respect to the proposed award of the formal bid/quote/proposal.

The "Notice of Intent to File a Protest" is one of two documents necessary to perfect Protest. The second document is the "Formal Written Protest", both documents are described below.

The "Notice of Intent to File a Protest" document must state all grounds claimed for the Protest, and clearly indicate it as the "Notice of Intent to File a Protest". Failure to clearly indicate the Intent to file the Protest shall constitute a waiver of all rights to seek any further remedies provided for under this Protest Procedure.

The "Notice of Intent to File a Protest" shall be received ("stamped in") by the Procurement Management Director or Public Works Director not later than Four o'clock (4:00) PM on the third working day following the day of receipt of the County's Notice of Intended Decision.

The affected party shall then file its Formal Written Protest within ten (10) calendar days after the time for the filing of the Notice of Intent to File a Protest has expired. Except as provided for in the paragraph below, upon filing of the Formal Written Protest, the contractor/vendor/firm shall post a bond, payable to the Lee County Board of County Commissioners in an amount equal to five percent (5%) of the total bid/quote/proposal, or Ten Thousand Dollars (\$10,000.00), whichever is less. Said bond shall be designated and held for payment of any costs that may be levied against the protesting contractor/vendor/firm by the Board of County Commissioners, as the result of a frivolous Protest.

A clean, Irrevocable Letter of Credit or other form of approved security, payable to the County, may be accepted. Failure to submit a bond, letter of credit, or other approved security simultaneously with the Formal Written Protest shall invalidate the protest, at which time the County may continue its procurement process as if the original "Notice of Intent to File a Protest" had never been filed.

Any contractor/vendor/firm submitting the County's standard bond form (CMO: 514), along with the bid/quote/proposal, shall not be required to submit an additional bond with the filing of the Formal Written Protest.

The Formal Written Protest shall contain the following:

- County bid/quote/proposal identification number and title.
- Name and address of the affected party, and the title or position of the person submitting the Protest.
- A statement of disputed issues of material fact. If there are no disputed material facts, the Formal Protest must so indicate.
- A concise statement of the facts alleged, and of the rules, regulations, statutes, or constitutional provisions, which entitle the affected party to relief.
- All information, documents, other materials, calculations, and any statutory or case law authority in support of the grounds for the Protest.

- A statement indicating the relief sought by the affected (protesting) party.
- Any other relevant information that the affected party deems to be material to Protest.

Upon receipt of a timely filed “Notice of Intent to File a Protest”, the Procurement Management Director or Public Works Director (as appropriate) may abate the award of the formal bid/quote/proposal as appropriate, until the Protest is heard pursuant to the informal hearing process as further outlined below, except and unless the County Manager shall find and set forth in writing, particular facts and circumstances that would require an immediate award of the formal bid/quote/proposal for the purpose of avoiding a danger to the public health, safety, or welfare. Upon such written finding by the County Manager, the County Manager may authorize an expedited Protest hearing procedure. The expedited Protest hearing shall be held within ninety-six (96) hours of the action giving rise to the contractor/vendor/firm’s Protest, or as soon as may be practicable for all parties. The “Notice of Intent to File a Protest” shall serve as the grounds for the affected party’s presentation and the requirements for the submittal of a formal, written Protest under these procedures, to include the requirement for a bond, shall not apply.

The Dispute Committee shall conduct an informal hearing with the protesting contractor/vendor/firm to attempt to resolve the Protest, within seven working days (excluding Saturdays, Sundays and legal holidays) from receipt of the Formal Written Protest. The Chairman of the Dispute Committee shall ensure that all affected parties may make presentations and rebuttals, subject to reasonable time limitations, as appropriate. The purpose of the informal hearing by the Dispute Committee, the protestor and other affected parties is to provide an opportunity: (1) to review the basis of the Protest; (2) to evaluate the facts and merits of the Protest; and (3) to make a determination whether to accept or reject the Protest.

Once a determination is made by the Dispute Committee with respect to the merits of the Protest, the Dispute Committee shall forward to the Board of County Commissioners its recommendations, which shall include relevant background information related to the procurement.

Upon receiving the recommendation from the Dispute Committee, the Board of County Commissioners shall conduct a hearing on the matter at a regularly scheduled meeting. Following presentations by the affected parties, the Board shall render its decision on the merits of the Protest.

If the Board’s decision upholds the recommendation by the Dispute Committee regarding the award, and further finds that the Protest was either frivolous and/or lacked merit, the Board, at its discretion, may assess costs, charges, or damages associated with any delay of the award, or any costs incurred with regard to the protest. These costs, charges or damages may be deducted from the security (bond or letter of credit) provided by the contractor/vendor/firm. Any costs, charges or damages assessed by the Board in excess of the security shall be paid by the protesting contractor/vendor/firm within thirty (30) calendar days of the Board’s final determination concerning the award.

All formal bid/quote/proposal solicitations shall set forth the following statement:

**“FAILURE TO FOLLOW THE BID PROTEST PROCEDURE REQUIREMENTS WITHIN THE TIMEFRAMES AS PRESCRIBED HEREIN AND ESTABLISHED BY LEE COUNTY BOARD OF COUNTY COMMISSIONERS, FLORIDA, SHALL CONSTITUTE A WAIVER OF YOUR PROTEST AND ANY RESULTING CLAIMS.”**

9. **PUBLIC ENTITY CRIME**

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 or 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 works 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 36 months from the date of being placed on the convicted vendor list.

10. **QUALIFICATION OF BIDDERS** (unless otherwise noted)

Bids will be considered only from firms normally engaged in the sale and distribution or provision of the services as specified herein. Bidders 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 is satisfactory, and reserves the right to reject bids where evidence submitted or investigation and evaluation indicates an inability of the bidder to perform.

11. **MATERIAL SAFETY DATA SHEETS**

In accordance with Chapter 443 of the Florida Statutes, it is the vendor’s responsibility to provide Lee County with Materials Safety Data Sheets on bid materials, as may apply to this procurement.

12. **MISCELLANEOUS**

If a conflict exists between the General Conditions and the detailed specifications, then the detailed specifications shall prevail.

13. **WAIVER OF CLAIMS**

Once this contract expires, or final payment has been requested and made, the awarded contractor shall have no more than 30 days to present or file any claims against the County concerning this contract. After that period, the County will consider the Contractor to have waived any right to claims against the County concerning this agreement.

14. **AUTHORITY TO PIGGYBACK**

It is hereby made a precondition of any bid and a part of these specifications that the submission of any bid in response to this request constitutes a bid made under the same conditions, for the same price, and for the same effective period as this bid, to any other governmental entity.

15. **COUNTY RESERVES THE RIGHT**

a) **State Contract**

If applicable, the County reserves the right to purchase any of the items in this bid from State Contract Vendors if the prices are deemed lower on State Contract than the prices we receive in this quotation.

b) **Any Single Large Project**

The County, in its sole discretion, reserves the right to separately quote any project that is outside the scope of this bid, whether through size, complexity, or dollar value.

c) **Disadvantaged Business Enterprises (DBE's)**

The County, in its sole discretion, reserves the right to purchase any of the items in this bid from a Disadvantaged Business Enterprise vendor if the prices are determined to be in the best interest of the County, to assist the County in the fulfillment of any of the County's grant commitments to federal or state agencies.

The County further reserves the right to purchase any of the items in this bid from DBE's to fulfill the County's stated policy toward DBE's.

d) **Anti-Discrimination**

The vendor for itself, its successors in interest, and assignees, as part of the consideration there of covenant and agree that:

In the furnishing of services to the County hereunder, no person on the grounds of race, religion, color, age, sex, national origin, handicap or marital status shall be excluded from participation in, denied the benefits of, or otherwise be subjected to discrimination.

The vendor will not discriminate against any employee or applicant for employment because of race, religion, color, age, sex, national origin, handicap or marital status. The vendor 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, handicap or marital status. Such action shall include, but not be limited to, acts of employment, upgrading, demotion or transfer; recruitment advertising; layoff or termination, rates of pay or other forms of compensation and selection for training, including apprenticeship.

Vendor agrees to post in a conspicuous place, available to employees and applicants for employment, notices setting forth the provisions of this anti-discrimination clause.

Vendor will provide all information and reports required by relevant regulations and/or applicable directives. In addition, the vendor shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by the County to be pertinent to ascertain compliance. The vendor shall maintain and make available relevant data showing the extent to which members of minority groups are beneficiaries under these contracts.



Where any information required of the vendor is in the exclusive possession of another who fails or refuses to furnish this information, the vendor shall so certify to the County its effort made toward obtaining said information. The vendor shall remain obligated under this paragraph until the expiration of three (3) years after the termination of this contract.

In the event of breach of any of the above anti-discrimination covenants, the County shall have the right to impose sanctions as it may determine to be appropriate, including withholding payment to the vendor or canceling, terminating, or suspending this contract, in whole or in part.

Additionally, the vendor may be declared ineligible for further County contracts by rule, regulation or order of the Board of County Commissioners of Lee County, or as otherwise provided by law.

The vendor will send to each union, or representative of workers with which the vendor has a collective bargaining agreement or other contract of understanding, a notice informing the labor union of worker's representative of the vendor's commitments under this assurance, and shall post copies of the notice in conspicuous places available to the employees and the applicants for employment.

The vendor will include the provisions of this section in every subcontract under this contract to ensure its provisions will be binding upon each subcontractor. The vendor will take such actions with respect to any subcontractor, as the contracting agency may direct, as a means of enforcing such provisions, including sanctions for non-compliance.

16. **AUDITABLE RECORDS**

The awarded vendor shall maintain auditable records concerning the procurement adequate to account for all receipts and expenditures, and to document compliance with the specifications. These records shall be kept in accordance with generally accepted accounting methods, and Lee County reserves the right to determine the record-keeping method required in the event of non-conformity. These records shall be maintained for two years after completion of the project and shall be readily available to County personnel with reasonable notice, and to other persons in accordance with the Florida Public Disclosure Statutes.

17. **DRUG FREE WORKPLACE**

Whenever two or more bids/proposals, which are equal with respect to price, quality and service, are received for the procurement of commodities or contractual services, a bid/proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall comply with the requirements of Florida Statutes 287.087.

18. **REQUIRED SUBMITTALS**

Any submittals requested should be returned with the bid response. This information may be accepted after opening, but no later than 10 calendar days after request.

19. **TERMINATION**

Any agreement as a result of this bid 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.

The Procurement Management Director may immediately terminate any agreement as a result of this bid for emergency purposes, as defined by the Lee County Purchasing and Payment Procedure Manual.

Any vendor who has voluntarily withdrawn from a formal bid/proposal 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 of Lee County Commissioners for waiver of this debarment. Such application for waiver of debarment must be coordinated with and processed by Procurement Management.

20. **CONFIDENTIALITY**

Vendors should be aware that all submittals (including financial statements) provided with a bid/proposal are subject to public disclosure and will **not** be afforded confidentiality.

21. **ANTI-LOBBYING CLAUSE**

All firms are hereby placed on formal notice that neither the County Commissioners nor candidates for County Commission, nor any employees from the Lee County Government, Lee County staff members, nor any members of the Qualification/Evaluation Review Committee are to be lobbied, either individually or collectively, concerning this project. Firms and their agents who intend to submit qualifications, or have submitted qualifications, for this project are hereby placed on *formal notice* that they are **not** to contact County personnel for such purposes as holding meetings of introduction, meals, or meetings relating to the selection process outside of those specifically scheduled by the County for negotiations. Any such lobbying activities may cause immediate disqualification for this project.

22. **INSURANCE (AS APPLICABLE)**

Insurance shall be provided, per the attached insurance guide. Upon request, an insurance certificate complying with the attached guide may be required prior to award.

LEE COUNTY, FLORIDA  
 PROPOSAL QUOTE FORM  
 FOR ELECTRIC MOTOR REPAIR & REPLACEMENT SERVICES

DATE SUBMITTED: \_\_\_\_\_

VENDOR NAME: \_\_\_\_\_

TO: The Board of County Commissioners  
 Lee County  
 Fort Myers, Florida

Having carefully examined the “General Conditions”, and the “Detailed Specifications”, all of which are contained herein, the Undersigned proposes to furnish the following which meet these specifications:

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

The undersigned acknowledges receipt of Addenda numbers: \_\_\_\_\_

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

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

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

hrs./yr.)		
Two man crane crew. (50 hrs/yr.)		50hrs x \$____/hr = \$____/yr
Transportation for field service personnel. (50 hrs/yr.)		50hrs x \$____/hr = \$____/yr

**Straight Time**

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

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

**\*GRAND TOTAL (Basis of Award)** \$ \_\_\_\_\_

(Grand total includes all total annual costs for straight time and mark-ups only. Do not include Options "A"-Overtime or Option "B"-Specialty Service)

**OPTION A**

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

<b>Hourly Rates – Equipment and Crew (Option A) OVERTIME</b>	
<b>Item/Classification</b>	<b><u>Overtime shall not exceed time and a half</u></b>
Crane – 20 ton with 75- foot reach. (50 hrs/yr.)	Same as straight time rate

Two man crane crew. (50 hrs/yr.)	50hrs x \$____/hr = \$____/yr
Transportation for field service personnel. (50 hrs/yr.)	Same as straight time rate.

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

**OPTION B:**

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

TO BE STARTED WITHIN \_\_\_\_\_ CALENDAR DAYS AFTER RECEIPT OF AWARD AND PURCHASE ORDER.

WILL YOU DELIVER WITH YOUR OWN VEHICLE AS OPPOSED TO COMMON CARRIER?  
 YES \_\_\_\_\_ NO \_\_\_\_\_

Does your firm have a location/office/facility in Lee County?  
 YES \_\_\_\_\_ NO \_\_\_\_\_

Address:  
 \_\_\_\_\_

Bidders should carefully read all the terms and conditions of the specifications. Any representation of deviation or modification to the bid may be grounds to reject the bid.

Are there any modifications to the bid or specifications:  
 YES \_\_\_\_\_ NO \_\_\_\_\_

Failure to clearly identify any modifications in the space below or on a separate page may be grounds for the bidder being declared nonresponsive or to have the award of the bid rescinded by the County.

**MODIFICATIONS:**

Bidder shall submit his/her bid on the County's Proposal Quote Form, including the firm name and authorized signature. Any blank spaces on the Proposal Quote Form, qualifying notes or exceptions, counter offers, lack of required submittals, or signatures, on County's Form may result in the Bidder/Bid being declared non-responsive by the County.

ANTI-COLLUSION STATEMENT

**THE BELOW SIGNED BIDDER HAS NOT DIVULGED TO, DISCUSSED OR COMPARED HIS BID WITH OTHER BIDDERS AND HAS NOT COLLUDED WITH ANY OTHER BIDDER OR PARTIES TO A BID WHATSOEVER. NOTE: NO PREMIUMS, REBATES OR GRATUITIES TO ANY EMPLOYEE OR AGENT ARE PERMITTED EITHER WITH, PRIOR TO, OR AFTER ANY DELIVERY OF MATERIALS. ANY SUCH VIOLATION WILL RESULT IN THE CANCELLATION AND/OR RETURN OF MATERIAL (AS APPLICABLE).**

FIRM NAME \_\_\_\_\_

BY (Printed): \_\_\_\_\_

BY (Signature): \_\_\_\_\_

TITLE: \_\_\_\_\_

FEDERAL ID # OR S.S.# \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

PHONE NO.: \_\_\_\_\_

FAX NO.: \_\_\_\_\_

CELLULAR PHONE/PAGER NO.: \_\_\_\_\_

DUNS #: \_\_\_\_\_

LEE COUNTY LOCAL BUSINESS TAX ACCOUNT NUMBER:

\_\_\_\_\_

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

DISADVANTAGED BUSINESS ENTERPRISE (DBE): \_\_\_\_\_ Yes \_\_\_\_\_ No

**LEE COUNTY, FLORIDA  
DETAILED SPECIFICATIONS  
FOR**

**SCOPE**

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

**OVERVIEW**

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

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

**TERM OF AWARD**

If awarded, the terms of this solicitation shall be in effect for one year or until new quotes are taken and awarded. The County reserves the right to renew this quote (or any portion thereof) and to negotiate lower pricing as a condition for each renewal, for up to four additional one-year periods, upon mutual agreement of both parties and, except as to lower pricing, under the same terms and conditions.

**REGULAR DEALER**

Quotes will be considered only from firms which qualify as a “regular dealer”.

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

**MAJOR BREAKDOWNS/NATURAL DISASTERS**

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

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

DESIGNATED CONTACT

The awarded vendor shall appoint a person or persons to act as a primary contact for all County departments. This person or back-up shall be readily available during normal work hours by phone or in person, and shall be knowledgeable of the terms and procedures involved.

BASIS OF AWARD

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

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

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

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

NOTE: 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).

COMPENSATION RATE AND FEE SCHEDULE CHANGES

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

AFFIDAVIT CERTIFICATION IMMIGRATION LAWS

The attached document, Affidavit Certification Immigration Laws, is required and should be submitted with your solicitation package. It must be signed and notarized. Failure to include this affidavit with your response will delay the consideration and review of your submission; and could result in your response being disqualified.

SUB-CONTRACTORS

The use of sub-contractors under this quote is not allowed without prior written authorization from the County representative.



### LOCAL BIDDER'S PREFERENCE

Note: In order for your firm to be considered for the local vendor preference, you must complete and return the attached "Local Vendor Preference Questionnaire" with your quotation.

The Lee County Local Bidder's Preference Ordinance No. 08-26 is being included as part of the award process for this project. As such, Lee County at its sole discretion, may choose to award a preference to any qualified "Local Contractor/Vendor" in an amount not to exceed 3 % of the total amount quoted by that firm.

"Local Contractor / Vendor" shall mean: a) any person, firm, partnership, company or corporation whose principal place of business in the sole opinion of the County, is located within the boundaries of Lee/Collier County, Florida; or b) any person, firm, partnership, company or corporation that has provided goods or services to Lee County on a regular basis for the preceding consecutive three (3) years, and that has the personnel, equipment and materials located within the boundaries of Lee/Collier County sufficient to constitute a present ability to perform the service or provide the goods.

The County reserves the exclusive right to compare, contrast and otherwise evaluate the qualifications, character, responsibility and fitness of all persons, firms, partnerships, companies or corporations submitting formal bids or formal quotes in any procurement for goods or services when making an award in the best interests of the County.

### AGREEMENTS/CONTRACTS

The awarded vendor will be required to execute an Agreement/Contract as a condition of award. A sample of this document may be viewed on-line at <http://www.lee-county.com/gov/dept/ProcurementManagement/contracts/Pages/Forms.aspx> .

### WARRANTIES

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

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

### DOCUMENTATION

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

### AUTHORIZATION TO PERFORM WORK

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

### INVOICING

**Quoters should provide a sample invoice with their quote. At a minimum, this invoice should include the following items.**

- County work order, purchase order or contract number.
- Name of facility where work was performed.
- Address or location of facility.

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

## **SECTION 1 - QUALIFICATIONS**

### **Introduction**

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

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

### **Response Format**

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

1. **Report on the Firm** (maximum 25 pages)
  - a. The history of the firm, its corporate structure, years in business, current facility, fleet, inventory resources, and areas of expertise.
  - b. Capabilities and technical background of dedicated staff.
  - c. List any current or past clients for whom the firm is providing or has provided a similar service program. Include a description of the services provided, the scale of the program, and a point of contact for each. Vendor must demonstrate a proficiency for servicing a utilities infrastructure like that of Lee County.

- 2. **Project Approach** (maximum 25 pages)  
Describe, in detail, the proposed strategy for providing the services as listed. Include emergency and non-emergency response times, estimates of typical repair times for motors and pumps, a sample predictive maintenance proposal, and your warranty policy.
- 3. **Additional Information (optional)** (maximum 10 pages)  
Provide any additional information that may assist in the evaluation of the quotation.

**VENDOR REQUIREMENTS**

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

- 1. **Field Service Capabilities** – provide trained personnel and service vehicles to Lee County in the removing and re-installing of all rotating equipment if required.  
Yes \_\_\_\_\_ No \_\_\_\_\_
- 2. **Predictive Maintenance** – provide trained personnel and service vehicles to Lee County for vibration analyses, field balancing, and laser alignment of all equipment pulled out of service and reinstalled where applicable. Vendor must own and maintain an IRD Data Pac 1500 and a Fixture Laser or equivalent to perform these services. A hard copy of results will be furnished with each repair.  
Yes \_\_\_\_\_ No \_\_\_\_\_
- 3. **U.L. 508 Control Panel Builder** – Vendor will supply to Lee County the ability to design, engineer, fabricate and install a U.L. Listed Control Panel. It is not necessary for the vendor to fabricate or engineer these panels in-house; panels not built on the vendor’s premises but are built to County specifications in a U.L. 508 panel facility will be acceptable  
Yes \_\_\_\_\_ No \_\_\_\_\_
- 4. **Inventory** – Vendor will maintain a motor inventory of high efficiency motors from fractional up to and including 150HP, 460-volt, TEFC, 1800RPM at his repair facility. A copy of his current inventory will be required prior to ratifying contract.  
Yes \_\_\_\_\_ No \_\_\_\_\_

**INSURANCE REQUIREMENTS (MINIMUM):**

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

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

**1. Introduction**

**1.1 OVERVIEW**

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

**1.2 INTENT**

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

**1.3 REFERENCE DOCUMENTS**

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

- UL** UL674 Electric Motors and Generators For Use In Hazardous Locations
- EASA** AR100-1998 Recommended Practice For The Repair of Rotating Electrical Apparatus
- IEEE** IEEE Std. 43, Recommended Practice for Testing Insulation Resistance of Rotating Machinery  
IEEE Std. 112, IEEE Standard Test Procedure for Polyphase Induction Motors and Generators
- ISO** ISO Std 1940-1, Mechanical Vibration—Balance Quality Requirements of Rigid Rotors
- NEMA** NEMA Std. MG-1, Motors and Generators
- ABMAANSI/ABMA** Std. 7, Shaft and Housing Fits for Metric Radial Ball and Roller Bearings

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

**1.4 HAZARDOUS LOCATIONS**

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

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

**1.5 GENERAL**

**1.5.1 Unavoidable Degradation**

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

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

**1.5.2 Operating Environment**

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

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

**1.5.3 If Powered by an Inverter**

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

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

**1.5.4 Subcontracted Work**

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

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

**2. Repair Procedures**

**2.1 DOCUMENTATION**

**2.1.1 Repair Forms**

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

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

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

**2.1.2 Expanded Work Scope**

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

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

**2.1.3 File**

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

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

**2.2 INCOMING INSPECTION**

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

**2.2.1 Intent**

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

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

**2.2.2 Visual**

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

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

**2.2.3 Insulation to Ground**

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

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

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

**2.2.4 Bearings**

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

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

**2.2.5 No Load Run**

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

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

**2.3 DISMANTLING**

**2.3.1 Identify Problem**

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

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

**2.3.2 Markings**

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

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

**2.3.3 Parts Storage**

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

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

**2.3.4 Insulated Bearings**

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

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

**2.3.5 Dowels**

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

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

**2.3.6 Explosion Proof**

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

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

**2.3.7 Rotor Removal**

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

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

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

**2.4 VERTICAL MOTORS**

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

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

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

**2.5 WINDING REMOVAL**

**2.5.1 General**

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

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

**2.5.2 Take Data**

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

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

**2.5.3 Core Loss**

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

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

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

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

**2.5.4 Burn Out**

The winding shall be burned out in a controlled temperature burnout oven where the part temperature is limited by means of fuel control and supplementary (water spray) cooling to 360°C (680°F) for organic (C3) or 400°C (750°F) for inorganic (CS) interlaminar insulation. If a higher temperature is deemed necessary, repairer shall reference communication or documentation from the motor manufacturer indicating that the core iron can safely withstand the temperature.

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

**2.5.5 Aluminum Frame**

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

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

**2.6 CORE PREPARATION**

**2.6.1 Cleaning**

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

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

**2.6.2 Iron Damage**

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

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

**2.6.3 Method of Repair**

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

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



- **Restacking.** Restacking, with deburred laminations and new interlaminar insulation.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.6.4 Core Loss Test**

A final core loss test shall be done as described in sub-section 2.5.3.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.7 REWINDS**

**2.7.1 Winding Details**

The total cross sectional area of a turn, the turns per coil, the span and connection of the coils shall not be changed without authorization from Utilities.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.7.2 Thermal Class**

Class H or higher system materials shall be used throughout. Windings which were originally Class F or lower shall be rewound with Class H magnet wire and materials.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.7.3 Sensors**

Temperature sensing devices shall be replaced with devices comparable to those previously used.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.7.4 Explosion Proof**

If the temperature class of the insulation of an explosion-proof motor has been increased, a temperature sensor shall be installed to monitor and limit the motor surface temperature to the original maximum external temperature. The motor shall be tagged with a warning to the operator that to maintain the hazardous area classification, the sensor must be connected to shut down the motor.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.7.5 Insulation Materials**

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

- **Turn insulation.** Multiple build coating turn insulation of polyamide, polyimide or a combination of both over polyester, or equivalent;
- **Slot Liner.** Slot liner extending at least one-quarter inch past each end of the slot;
- **Separator.** Center strip or separator between the top and bottom coil sides in a slot;
- **Wedge.** A top piece to hold the coils in the slot (where needed, a bottom filling piece shall be used to make up any extra space in the slot); and,
- **Phase Barriers.** Phase barriers between end turns of different phases (these shall be trimmed to permit clear airflow).  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.7.6 End Turns**

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

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

**2.7.7 Connections**

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

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

**2.7.8 Winding Test**

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

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

**2.7.9 Impregnation**

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

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

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

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

**2.8 ROUTINE OVERHAULS**

**2.8.1 Testing**

After dismantling, the following procedure shall be followed:

- Winding and cooling ducts shall be cleaned, dried and inspected.
- Winding insulation resistance shall be tested at 500 volts DC.
- The duration of the test shall be one minute. The minimum acceptable level after one minute, corrected to a 40<sup>0</sup>C reference temperature per IEEE 43, is 20 megohms. Levels less than 20 megohms shall be discussed with Utilities.
- If satisfactory levels are not attained, the winding shall be re-cleaned and dried thoroughly at a temperature not exceeding 90<sup>0</sup>C (195<sup>0</sup>F), and then retested.
- After successful insulation resistance to ground has been achieved, the winding shall be given a high potential or surge comparison test. Voltage level used shall be as indicated in EASA Recommended Practice for the Repair of Rotating Electrical Apparatus or other standards approved by Utilities.

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

**2.8.2 Cleaning**

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

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

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

All components shall be thoroughly dried at a temperature less than 90°C (195°F), for as long as it takes to remove all signs of moisture. For windings, this will be indicated by the insulation resistance stabilizing after some hours of drying.

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

**2.8.3 Repairs**

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

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

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

**2.8.4 Other**

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

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

**2.8.5 Reassembly**

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

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

**2.9 ROTOR TEST AND REPAIR**

**2.9.1 Testing**

All rotors shall be given a test for damaged bars, whether the motor is suspect in this area or not. This test shall apply a stable single-phase voltage to the stator of the assembled motor while the shaft is slowly turned through at least one revolution. Any fluctuations of stator current in excess of 3 percent shall be investigated further.

Other methods may be used if the stator winding is faulty and it can be shown that they have a good record of detecting faults.

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

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

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

**2.9.2 Fabricated Cage Repair**

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

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

**2.9.3 Cage Replacement**

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

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

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

**2.9.4 Testing**

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

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

**2.9.5 Balance**

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

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

**2.9.6 Cast Rotor Repair**

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

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

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

**2.9.7 Iron Repairs**

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

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

**2.10 SHAFT REPAIR**

**2.10.1 General**

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

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

**2.10.2 Requirements**

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

- **Total Indicated Runout.** It shall be straight, with a Total Indicated Runout (TIR) when measured in V blocks, of no more than 0.051 mm (0.002 inch) for up to 41.3 mm (1.625 inch) shaft diameter and no more than 0.003 inch for larger diameters.
- **No Cracks.** The shaft shall have no cracks. If ultrasonic, magnetic particle, dye penetrant or other testing methods are needed to verify this; they shall be documented

in repair records.

- **Straightness.** The shaft shall be straight, parallel and undamaged at the bearing areas. If any measurable but acceptable deviation from this is noted, it shall be documented in repair records.
- **Journal Repairs.** Make journal repairs by welding or plating, followed by machining and grinding, with fit as specified in section 2.11.4.
- **Fit To Rotor.** The shaft shall be a tight fit to the rotor iron. If there is looseness, the shaft shall be built up and turned for proper interference fit, or shall be replaced.
- **Shaft Material.** New shafts shall be machined from AISI Gr. C1045 hot rolled steel or better. For special applications, the service center shall consult with the manufacturer and report recommendations to Utilities.
- **Tolerances.** Shaft extension dimension tolerances shall be within the limits specified in NEMA MG-1, Motors and Generators sections.

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

**2.11 ANTI-FRICTION BEARINGS**

**2.11.1 New Bearings**

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

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

**2.11.2 Shielding, Sealing**

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

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

**2.11.3 Clearance**

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

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

**2.11.4 Tolerances**

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

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

**2.11.5 Heating**

The bearing shall be heated, without use of direct flame, to approximately 94<sup>0</sup>C (200<sup>0</sup>F) to permit it to be slid easily onto the shaft up to the shoulder. Bearings with bores under 45mm may be press fit.

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

**2.11.6 Grease**

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

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

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

**2.11.7 Insulated Bearings**

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

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

**2.12 END BRACKETS**

**2.12.1 Requirements**

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

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

**2.12.2 Tolerances**

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

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

**2.12.3 Repairs**

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

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

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

**2.13 OTHER DEVICES**

**2.13.1 Fans**

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

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

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

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

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

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

**2.13.2 Temperature Sensors**

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

- **Bearing.** Bearing sensors shall be of the same type as those removed and shall be located to sense, as nearly as possible, the highest bearing temperature. If the original bearing sensor was insulated, the replacement shall also be insulated.

- **Winding.** Sensor type shall be the same as the original and will usually be located in the end turns.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.13.3 Leads**

Leads shall be flexible and multi-stranded, and have at least the same cross sectional area as the original leads. Temperature class must be the same as original or better. Main power and accessory leads shall be indelibly marked using the same marking systems as the incoming motor. If this is illegible, then the system described in NEMA MG-1, Motors and Generators, Section 2 shall be used and a notice describing the system attached to the terminal box. Every effort shall be made to keep the original direction of rotation.

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

If crimp lugs are used, the correct make and style of die shall be used for the particular lug, and the correct compression applied.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.13.4 Terminal Boxes**

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

- Missing bolts and gaskets for both the cover and the motor-to-box joint shall be replaced.
- On motors certified for hazardous environments, the junction boxes shall be sealed off from the main body of the motor by a sealing compound approved by UL for this application.
- Damaged flanges shall be repaired. No paint or gaskets shall be left on the flanges of boxes for explosion-proof motors.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.13.5 Space Heaters**

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

They shall be tested for correct functioning.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.13.6 Vibration Sensors**

Vibration sensors shall be replaced in their original locations.  
 Yes\_\_\_\_\_ No\_\_\_\_\_

**2.14 BALANCING**

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

- **Half key.** It shall be balanced with a half key in the keyway.
- **Tolerance G2.5 (ISO 1940-1).** Generally, the permitted total imbalance is  $i5W/N/2 = oz$  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  $6W/n/2 =$  oz.in./plane. (170.4 W/n/2 gin. in/plane)
- **Material removal.** If material is removed, structural integrity and fan capacity shall be maintained.
- **Added material.** Added material shall be able to withstand the centrifugal forces and be positioned either in the manufacturer’s designated positions and locked in place, or positioned in a location where centrifugal force will tend to keep the material in place. Weights may be attached to metallic parts only.  
Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.15 REASSEMBLY

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

- Match marks shall line up.
- On reinsertion of the rotor, take care not to damage the journals or the stator windings. Cranes, slings and extension pipes shall be used on heavy rotors. Check axial alignment of stator and rotor cores.
- Dowels and fitted bolts shall go back into the same holes that they came from.
- Where they can be measured, all air gaps shall be within 10 percent of the average.
- On motors with insulated bearings, the insulation shall be checked and noted. (See 2.11.7)
- On vertical motors, the lift on the shaft shall be the same as the original manufacturer’s setting, unless Utilities and the repairer agree that a modified setting would give better performance.
- Motors for use in hazardous environments shall have all the explosion-proof features maintained and verified in accord with UL674.  
Yes \_\_\_\_\_ No \_\_\_\_\_

### 2.16 FINAL TESTS

#### 2.16.1 Insulation

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

For rewind 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 40°C, which are less than 20 megohms, shall be discussed with Utilities. Vendor will own and maintain a Baker D12000 Hi-Pot Tester or equivalent to perform these tests and shall print out results and attach to each job tracker.

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

#### 2.16.2 Running Test

After the insulation tests, the motor shall be run at no load at full terminal voltage, with either a half key or a half coupling, on the shaft. If the motor uses an external oil supply and removal



system in normal use, a similar system shall be arranged for the test. The test shall determine that:

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

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

### 3. Quality Control

#### 3.1 MEASURING INSTRUMENTS

##### 3.1.1 Calibration

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

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

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

##### 3.1.2 Storage

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

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

#### 3.2 MATERIALS

##### 3.2.1 Anti-Friction Bearings

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

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

**3.2.2 Solid Insulation**

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

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

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

**3.2.3 Resins And Varnishes**

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

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

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

**3.2.4 Other Materials**

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

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

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

**3.3 TESTS AND INSPECTION DURING WORK**

**3.3.1 Records**

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

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

**3.3.2 Access**

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

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

**3.4 FINAL INSPECTION AND TEST**

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

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

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

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

### 4. Motor Repair Form

<b>Repairer:</b>				<b>Date:</b>
<b>Motor</b>	Facility	Dept.	Process	Description
<b>Designation:</b>				
Manufacturer:		Type:	Power:	
Volts:	Amperes:	Speed:	Frame:	
Serial #:		Bearings:	Lubricant Grade:	
		Replace w/bearing by (mfg):		
Other:				
<b>Service:</b>			<input type="checkbox"/> Powered by ASD	<input type="checkbox"/> Contamination
Explain:			<input type="checkbox"/> High Altitude	<input type="checkbox"/> High Ambient Temp
Reason sent for repair:				

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

## Standard 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:

\$500,000 per occurrence  
\$1,000,000 general aggregate  
\$500,000 products and completed operations  
\$500,000 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:

\$500,000 combined single limit (CSL)  
\$300,000 bodily injury per person  
\$500,000 bodily injury per accident  
\$300,000 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:

\$100,000 per accident  
\$100,000 disease limit  
\$500,000 disease – policy limit

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

**Verification of Coverage:**

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

- a. **The certificate holder shall read as follows:**

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

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

**Special Requirements:**

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

**ATTACHMENT A**  
**LOCAL VENDOR PREFERENCE QUESTIONNAIRE**  
**(LEE COUNTY ORDINANCE NO. 08-26)**

Instructions: Please complete either Part A or B whichever is applicable to your firm

**PART A: VENDOR'S PRINCIPAL PLACE OF BUSINESS IS LOCATED WITHIN LEE/COLLIER COUNTY (Only complete Part A if your principal place of business is located within the boundaries of Lee/Collier County)**

1. What is the physical location of your principal place of business that is located within the boundaries of Lee/Collier County, Florida?

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2. What is the size of this facility (i.e. sales area size, warehouse, storage yard, etc.)

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**PART B: VENDOR'S PRINCIPAL PLACE OF BUSINESS IS NOT LOCATED WITHIN LEE/COLLIER COUNTY OR DOES NOT HAVE A PHYSICAL LOCATION WITHIN LEE/COLLIER COUNTY (Please complete this section.)**

1. How many employees are available to service this contract? \_\_\_\_\_

2. Describe the types, amount and location of equipment you have available to service this contract.

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LOCAL VENDOR PREFERENCE QUESTIONNAIRE CONTINUED

3. Describe the types, amount and location of material stock that you have available to service this contract.

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4. Have you provided goods or services to Lee County on a regular basis for the preceding, consecutive three years?

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

If yes, please provide your contractual history with Lee County for the past three, consecutive years. Attach additional pages if necessary.

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**Lee County Ordinance No. 08-26**  
**Local Bidder's Preference**

**AFFIDAVIT**  
**PRINCIPAL PLACE OF BUSINESS**

**Principal place of business is located within the boundaries of Lee County.**

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

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

The foregoing instrument was signed and acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by \_\_\_\_\_ who has produced

(Print or Type Name)  
\_\_\_\_\_ as identification.  
(Type of Identification and Number)

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

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

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

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



AFFIDAVIT CERTIFICATION  
IMMIGRATION LAWS

SOLICITATION NO.: \_\_\_\_\_ PROJECT NAME: \_\_\_\_\_

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

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

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

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

\_\_\_\_\_  
Signature Title Date

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

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

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

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

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

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

LEE COUNTY PROCUREMENT MANAGEMENT - BIDDERS CHECK LIST

**IMPORTANT:** Please read carefully and return with your bid proposal. Please check off each of the following items as the necessary action is completed:

- \_\_\_\_\_ 1. The Solicitation has been signed and with corporate seal (if applicable).
- \_\_\_\_\_ 2. The Solicitation prices offered have been reviewed (if applicable).
- \_\_\_\_\_ 3. The price extensions and totals have been checked (if applicable).
- \_\_\_\_\_ 4. Substantial and final completion days inserted (if applicable).
- \_\_\_\_\_ 5. The original (must be manually signed) and 1 hard copy original and others as specified of the Solicitation has been submitted.
- \_\_\_\_\_ 6. Two (2) identical sets of descriptive literature, brochures and/or data (if required) have been submitted under separate cover.
- \_\_\_\_\_ 7. All modifications have been acknowledged in the space provided.
- \_\_\_\_\_ 8. All addendums issued, if any, have been acknowledged in the space provided.
- \_\_\_\_\_ 9. Licenses (if applicable) have been inserted.
- \_\_\_\_\_ 10. Erasures or other changes made to the Solicitation document have been initialed by the person signing the Solicitation.
- \_\_\_\_\_ 11. Contractor's Qualification Questionnaire and Lee County Contractor History (if applicable).
- \_\_\_\_\_ 12. DBE Participation form completed and/or signed or good faith documentation.
- \_\_\_\_\_ 13. Bid Bond and/or certified Check, (if required) have been submitted with the Solicitation in amounts indicated.
- \_\_\_\_\_ 14. Any Delivery information required is included.
- \_\_\_\_\_ 15. Affidavit Certification Immigration Signed and Notarized
- \_\_\_\_\_ 16. Local Bidder Preference Affidavit (if applicable)
- \_\_\_\_\_ 17. The mailing envelope has been addressed to:

<b>MAILING ADDRESS</b>		<b>PHYSICAL ADDRESS</b>
Lee County Procurement Mgmt.		Lee County Procurement Mgmt.
P.O. Box 398	or	1825 Hendry St 3 <sup>rd</sup> Floor
Ft. Myers, FL 33902-0398		Ft. Myers, FL 33901
- \_\_\_\_\_ 18. The mailing envelope **MUST** be sealed and marked with:

Solicitation Number
Opening Date and/or Receiving Date
- \_\_\_\_\_ 19. The Solicitation will be mailed or delivered in time to be received no later than the specified opening date and time. (Otherwise Solicitation cannot be considered or accepted.)
- \_\_\_\_\_ 20. If submitting a "NO BID" please write Solicitation number here \_\_\_\_\_ and check one of the following:
  - \_\_\_\_\_ Do not offer this product \_\_\_\_\_ Insufficient time to respond.
  - \_\_\_\_\_ Unable to meet specifications (why)
  - \_\_\_\_\_ Unable to meet bond or insurance requirement.
  - Other: \_\_\_\_\_

Company Name and Address:

\_\_\_\_\_

\_\_\_\_\_