



MULTNOMAH COUNTY

**CENTRAL PROCUREMENT & CONTRACT ADMINISTRATION
501 SE HAWTHORNE, Suite 400
PORTLAND, OR 97214**

REQUEST FOR PROPOSALS (RFP)

RFP Number P09-9582

August 20, 2008

CHILLER MAINTENANCE AND REPAIR SERVICES

Proposals Due/Closing Time: September 17, 2008 by 4:00 P.M.

Refer Questions to:

Nancy Walters, Senior Procurement Analyst
Email: nancy.r.walters@co.multnomah.or.us
Phone: (503) 988-5111, Ext. 28763
Fax: (503) 988-3252

**Pre-Proposal Conference &
Walk-Thru**

There will be an optional pre-proposal conference/walk-thru for this RFP commencing at 8:00 A.M. on August 26, 2008. See Section 4 of this RFP for details. Attendance at the pre-proposal conference/walk-thru is strongly encouraged.

Electronic copies of this RFP and related documents can be obtained from the Multnomah County Central Procurement & Contract Administration ("CPCA") website at:
<http://www.multcopurch.org>.

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ATTACHMENTS:

- Attachment 1 Chiller Listing and Locations
- Attachment 2 Maintenance and Performance Bond
- Attachment 3 Proposer Representations and Certifications
- Attachment 4 Cost Sheet
- Attachment 5 Reference Check Form
- Attachment 6 Sample Maintenance Plan Items
- Attachment 7 Contract

SECTION 1 – OVERVIEW.

1.1 Introduction. The Facilities and Property Management Division of the Department of County Management, Multnomah County, Oregon (the “**County**”) is soliciting proposals (individually, a “**Proposal**”, and collectively, “**Proposals**”) from chiller maintenance firms (each a “**Proposer**”) to provide services to certain County’s chillers (each a “**Chiller**”, and collectively, the “**Chillers**”). The Chillers provide cooling for essential County facilities. A schedule of the Chillers and their locations is attached as Attachment 1. The Chillers are manufactured by Carrier, McQuay, Multistack, Trane and York (the “**Manufacturers**”).

1.2 Method of Award. The County intends to enter into a full service maintenance and repair Contract (see Section 6 below) under which the **Contractor**¹ shall accept full repair and maintenance responsibility for the Chillers. The County may award a Contract based on initial Proposals received, without discussion of such Proposals, to the Proposer whose Proposal is deemed to offer the best overall value to the County in accordance with the evaluation and selection process set forth in this RFP. Accordingly, initial Proposals should reflect the Proposer’s most favorable terms. However, the County may, at its unilateral discretion, conduct an oral interview process or engage in discussions and solicit best and final offer (“**BAFO**”) proposals as provided in Section 8 of this RFP.

SECTION 2 - SCOPE OF WORK.

2.1 Services. The Contractor selected under this RFP shall provide: (i) inspection, maintenance, routine and emergency repair, and overhaul services for the Chillers as described in this RFP on a 24 hours/day, 365 days/year basis, and (ii) all labor, parts and supplies incident to the services (collectively, the “**Services**”). The Services shall be provided in such a manner: (i) to keep the Chillers in continuous top operating condition in accordance with each Chiller Manufacturer’s specifications and recommendations, industry standards, and the Maintenance Plans (see Section 7.3.4 below), and (ii) to ensure optimum temperature control and maximum conservation of energy. The Services shall be provided only by Certified Technicians (see Section 2.5 below) utilizing only parts, materials, test equipment, tools and techniques in conformity with the Chiller Manufacturers’ published specifications and recommendations, all in accordance with the terms and conditions of this RFP. Except as provided in Section 3 below, the Contractor shall accept complete responsibility for the Chillers in their existing condition on the effective date of the Contract and thereafter provide the Services.

2.2 Excluded Work. There is excluded from the definition of Services, and the Contractor shall not be responsible for or be required to service and maintain, the chemical treatment of a Chiller’s condenser water and chilled water, the cooling tower, the condenser water and chilled water pumps and the water strainers. These services may be added at a future date.

2.3 Types of Services.

2.3.1 Continuous/Emergency Service.

Contractor shall provide continuous/emergency response repair service on a 24 hours/day, 365 days/year basis to repair all reported Chiller failures. Given the critical nature of the Chillers, should a Chiller fail to operate properly between regular services, the Contractor shall respond to the failure within two hours of receiving notice from the County.

2.3.2 Monthly Service.

All Chillers shall receive monthly running inspections and service by the Contractor during the six months of May through October of each year. During the course of these inspections and service

¹ “Contractor” means the Proposer with whom the County enters into the Contract for the Services pursuant to this RFP

the Contractor shall perform any needed servicing and adjusting of the Chiller. Each monthly service shall consist of predetermined recurring maintenance actions in accordance with each Chiller Manufacturer's specifications and recommendations, industry standards, and the Maintenance Plan applicable to the Chiller taking into consideration the specific situational operating performance, conditions and requirements of the Chiller.

2.3.3 Annual Service.

All Chillers shall receive annual service each year during the five months of November through March of the following year. During the course of these inspections and service the Contractor shall perform any needed servicing and adjusting of the Chiller. Each annual service shall consist of predetermined recurring maintenance actions in accordance with each Chiller Manufacturer's specifications and recommendations, industry standards, and the Maintenance Plan applicable to the Chiller taking into consideration the specific situational operating performance, conditions and requirements of the Chiller.

2.3.4 Overhaul Service.

Each Chiller is to be overhauled when the Chiller has met the Manufacturer's recommended hourly run time for overhaul service or as mutually agreed by County and Contractor after taking into consideration the specific situational operating performance, conditions and requirements of the Chiller.

2.3.5 Extra Work.

Repairs or services to the Chillers which are not part of the Services ("**Extra Work**") shall be provided by the Contractor upon request of the County on a "time and materials" basis.

2.4 Maintenance Plans.

The Chillers are arranged into nine distinct groups (each a "**Group**") as listed on Attachment 1. It is expected that the Services shall be performed pursuant to a specific inspection and maintenance plan developed by the Contractor for each Group ("**Maintenance Plans**"; see Section 7.3.4 below). Each Maintenance Plan should: (i) address the individual Chiller's Manufacturer's specifications and recommendations, industry standards and the specific situational operating performance, conditions and requirements of the Chiller and (ii) be tailored to incorporate the Chiller Manufacturer's specifications and recommendations for the Services to be provided. A Proposer is expected to propose a separate Maintenance Plan for each Chiller Group.

2.5 Certified Technicians.

All Services performed on a Chiller shall be provided only by a Contractor technician who: (i) is trained by and certified by the respective Manufacturer of the Chiller, and (ii) has a least five years of maintenance/repair experience with chillers with a rating of 100 tons or more manufactured by one or more of the five Manufacturers ("**Certified Technician**"). There must be at least one Certified Technician for each Manufacturer.

2.6 Logs.

Maintenance manuals for some of the Chillers are available on site and may contain approximately one year's maintenance information for each Chiller. The Contractor will be expected to prepare and maintain a Chiller service log ("**Service Log**") for each Chiller.

SECTION 3 – ASSESSMENT PERIOD.

- (1) The Services described herein assumes that the major elements of the Chillers are in normal operating condition as of the commencement of the Contract ("**Effective Date**"). Immediately following the Effective Date the Contractor shall be required to inspect each Chiller and provide the County with 60 days a written list ("**Preliminary Defects List**") of any purported malfunctions and defects of a Chiller which materially affects the normal operation of the Chiller ("**Material Defect**"). The Preliminary Defects List shall include a corresponding cost estimate (including the number of working hours and the cost of the parts) required to cure the Material

Defect. If any purported Material Defects are reported, then within 14 days following the County's receipt of the Preliminary Defects List the parties shall meet to evaluate and discuss the Preliminary Defects List for the purpose of agreeing to a final listing of Material Defects ("**Final Defects List**"). In the event that the Parties cannot mutually agree to the Final Defects List within 90 days of the Effective Date, regardless of the basis for such non-agreement, then either Party may terminate the Contract.

- (2) The County shall select from the Final Defects List those items which it will direct the Contractor to cure ("**Cure Items**"). The Contractor shall be required to commence the work necessary to cure the Cure Items pursuant to a work schedule approved in advance by the County. In addition to the Costs (see Section 7.3.5 below), the County will pay to Contractor for such Cure Items work the same hourly rate as that paid for Extra Work (see Section 2.3.5 above), plus the County will reimburse the Contractor for the actual cost of parts and materials required for the Cure Items work.
- (3) If there are items on the Final Defects List which the County elects not to select as a Cure Item ("**Non-Cure Item**"), and the Non-Cure Item directly results in the Contractor being required to render Services to a Chiller which Services were not otherwise required to be provided to the Chiller but for the decision of the County not to select the Non-Cure Item as a Cure Item ("**Exception Work**"), then in addition to the Costs, the County will pay to Contractor for such Cure Items work the same hourly rate as that paid for Extra Work, plus the County will reimburse the Contractor for the actual cost of parts and materials required for the Cure Items work.

SECTION 4 – PRE-PROPOSAL CONFERENCE/WALK-THRU.

There will be an optional pre-proposal conference/walk-thru for this RFP; attendance is strongly encouraged. The conference/walk-thru will occur over two consecutive days commencing at 8:00 AM on August 26, 2008 at the Multnomah Building, 501 SE Hawthorne Blvd., in the Copper Room located on the fifth floor, in accordance with the following schedule. Several of the facilities are secure facilities. The conference/walk-thru is designed to clarify the information that is contained in this RFP, give an opportunity to the Proposers to view the Chillers, and provide an opportunity for questions and answers. Proposers are cautioned that any statements made at the conference/walk-thru will not change any requirements or specifications of this RFP unless an addendum to this RFP is issued by CPCA and posted on the CPCA web site. The County reserves the right to alter the Chiller Walk-Thru Schedule.

There will be available at the pre-proposal conference/walk-thru and from CPCA (email: nancy.r.walters@co.multnomah.or.us) copies of a CD containing recent maintenance log entries for the Chillers to the extent the entries are available.

Attendees are advised that: (i) they leave any sharp instruments and cell phones in their vehicles as they must pass through a building security check, and (ii) on street parking is at a minimum at various locations.

Attendees who prefer to use County provided transportation for the conference/walk-thru must contact nancy.r.walters@co.multnomah.or.us not later than Friday August 22 to request transportation.

CHILLER WALK-THRU SCHEDULE			
-----Day #1-----			
No.	Facility	Time	Day
1	Multnomah Building 501 SE Hawthorne 5 th Floor	8:00 am – 9:00 am	#1 - 8/26/08
2	McCoy Building 426 SW Stark St.	9:15 am – 10:00 am	#1 – 8/26/08
3	Hillsdale Library 1525 Sunset Blvd.	10:30 am – 10:45 am	#1 - 8/26/08
4	Library Admin. Bldg. 205 NE Russell St.	11:30 am – 11:55 am	#1 - 8/26/08
	Lunch	11:55 am – 1:00 pm	#1 - 8/26/08
5	Juvenile Justice Ctr. 1401 NW 68 th Ave.	1:00 pm – 1:30 pm	#1 - 8/26/08
6	Kelly Building 4747 E. Burnside St.	1:45 pm – 2:15 pm	#1 - 8/26/08
7	Midland Library 805 SE 122 nd Ave.	2:30 pm – 3:00 pm	#1 - 8/26/08
8	Yeon Complex 1620 SE 190 th Ave.	3:30 pm – 4:00 pm	#1 - 8/26/08
-----Day #2-----			
9	Justice Center 11220 SW 3 rd St.	8:00 am – 8:45 am	#2 – 8/27/08
10	County Courthouse 1021 SW 4 th Ave., Room B-8	9:15 am – 10:00 am	#2 – 8/27/08
11	Inverness Jail 11541 NE Inverness Dr.	10:15 am – 11:15 am	#2 - 8/27/08
12	Wapato Facility 14355 N Bybee Lake Ct	12:00 pm – 1:00 pm	#2 - 8/27/08

SECTION 5 – SCHEDULE OF EVENTS.

The following schedule of events applies to this RFP. The County reserves the right to deviate from this Schedule of Events.

ACTIVITY	DATE (all time local)
RFP copies available from CPCA.	August 20, 2008
Optional Pre-Proposal Conference/ Walk-Thru	August 26-27, 2008
Last day to submit questions to CPCA	September 10, 2008
Proposals due/Closing Date	September 17, 2008 No later than 4:00 p.m.
Oral Interviews (if held)	September 24, 2008
Contractor selection	September 29, 2008

SECTION 6 – CONTRACT REQUIREMENTS.

6.1 General Terms.

The County intends to enter into a five-year, full service maintenance and repair Contract with the Contractor under which the Contractor shall accept complete maintenance and repair responsibility for the Chillers. A sample copy of the Contract is attached as Attachment 7. Specific Contract terms and conditions may be negotiated between the County and the Contractor. The Contractor shall be required to maintain the insurance coverages listed in Exhibit 9 to the Contract (Attachment 7). Proposers are strongly encouraged to review the Contract in detail as it contains material terms and conditions which form a part of this RFP and to which the Contractor shall be subject.

6.2 Trial Period.

The first 180 **days**² of the Contract shall be a "trial period" during which Contractor's compliance with the Contract will be evaluated by the County. If the County concludes, as determined in the County's sole discretion, that the Contractor is not in compliance with the terms of the Contract during this trial period, then the County may terminate the Contract. In the event of such termination, the County may enter into a new Contract with another Proposer.

6.3 Maintenance and Performance Bond.

Contractor will be required to post a \$1,000,000 Maintenance and Performance Bond ("**Bond**") issued by a surety acceptable to County to secure Contractor's performance under the Contract. The form of the Bond shall be substantially similar to the sample form of Bond attached as Attachment 2. The Bond shall remain in effect for up to 24 months after the termination of the Contract. Proposer shall provide as part of their Proposal a written statement from Proposer's surety ("**Surety Commitment Letter**") stating that the surety is committed to provide the required Bond in the amount of \$1,000,000 for the required time period.

6.4 EEO Certification.

The County's PCRB Rule 60-0040 (1) requires that all contractors furnishing goods and services to the County in excess of \$75,000 must be certified as an "Equal Opportunity Employer". The County contracts with the City of Portland for the certification process. Contact City of Portland, Bureau of Purchases, for the EEO certification application at <http://cityofportland.ebidsystems.com> or by phone at (503) 823-2299 for certification information. The County will not execute a contract with any Proposer that is not certified.

SECTION 7 – PROPOSAL FORMAT.

7.1 Proposal Format.

All text and graphics must be legible and easily read. Each Proposal shall be printed in black type, single space on single-sided 8.5" x 11" white recycled content paper using a font of at least 11 point size. The original Proposal with original signatures, and each of 5 exact duplicate copies, shall be identified on the outside cover: Original – 1 of 6, Copy – 2 of 6, Copy – 3 of 6, etc. The original Proposal should be unbound to allow for ease of reproduction; the five copies should be bound.

Proposal pages shall be numbered consecutively, but must not exceed 20 pages in total. Pages exceeding the page limitation will not be evaluated. Spreadsheets, pictures, diagrams and organization charts may be printed on 11" x 17" or 24" x 36" sheets folded and placed in a pocket divider; oversize sheets will be counted as one page each in the total page count.

² "Days" when used in this RFP means consecutive calendar days.

The following pages will not count toward the page limit and should be numbered using a different designation than other Proposal content or not be numbered at all:

- Proposer Representations and Certifications Form (attached as Attachment 3)
- Table of Contents
- Key Personnel Résumés
- Maintenance Plans
- Cost Sheet
- Surety Commitment Letter
- Reference Check Forms

The Proposal Elements identified in Section 7.3.1 through 6.3.5, shall be described in distinct sections and appropriately labeled in the order that they appear in this RFP.

Submit the completed and signed Proposer Representations and Certifications Form (Attachment 3) as the first page of the Proposal.

7.2 Minimum Requirements.

The following requirements must be met for the Proposal to be considered:

- Proposal must be time-stamped at the CPCA Bid Desk prior to the **Closing Time**³.
- Proposer must have a valid Oregon Construction Contractors Board (CCB) License.
- Proposer must have a physical presence within the **Portland Metropolitan Area**⁴ by maintaining a permanent office carried on the business records of Proposer with at least five Certified Technicians operating out of the office.
- The following items must be submitted as part of the Proposal:
 - (1) Signed Proposer Representations and Certifications Form (Attachment 3).
 - (2) Responses to the Proposal Elements (see Section 7.3).
 - (3) Signed Surety Commitment Letter.
 - (4) Completed Cost Sheet (Attachment 4).
 - (5) Three completed Reference Check Forms (Attachment 5).
 - (6) Schedule of any specific exceptions to the Terms and Conditions of the Contract. In the absence of such a schedule, the Proposer will be deemed to have accepted the Contract "as is".

7.3 Proposal Elements.

The Proposal shall contain the five Proposal elements (7.3.1 through 7.3.5) described below (each a "**Proposal Element**") in the order listed. Each Proposal Element has an associated evaluation weight ("**Points**"). The Proposer shall respond to each Proposal Element specifically and completely unto itself. Failure to include any one of the Proposal Elements may result in Proposal rejection.

7.3.1 Qualifications (100 Points).

Describe the Proposer's qualifications. The Proposer shall demonstrate their ability and capacity to perform the Services by providing the following information:

- (1) State the number of years the Proposer has been in the business in the Portland Metropolitan Area supplying services similar to the Services described in this RFP (a minimum of five years is required); describe a general statement of the firm's history.

³ "Closing Time" means the date and time set in this RFP as the deadline for submitting Proposals.

⁴ Being the Portland-Vancouver, Oregon-Washington, Metropolitan Statistical Area, which is an urban area in the states of Oregon and Washington centered around the city of Portland, Oregon. The Metropolitan Statistical Area includes Multnomah and most of Washington counties, and western parts of Clackamas County in Oregon, and extends across the Columbia River to include southern parts of Clark and Skamania counties in Washington state.

- (2) Describe the Proposer's organization, including names of principals, number of employees, representative clients, areas of specialization and expertise, and any related information that will assist the Evaluation Committee (see Section 8.1 below) in formulating an opinion about the stability and abilities of the Proposer.
- (3) Submit an organization chart showing the Key Personnel to be assigned to supervise and provide the Services, and the job duties of each person in the execution of the Services.
- (4) Submit a list of the firm's offices and facilities located within the Portland Metropolitan Area that substantially and directly supports the Proposer's ability to perform the Services.
- (5) Describe the Proposer's relevant company experience. The description should thoroughly describe how the Proposer has supplied services similar to the Services requested under this RFP to governmental agencies and private sector companies of equal size to the County. Include a listing of the number of chillers serviced and factory trained and certified personnel required and assigned for those services.
- (6) Describe examples of work recommendations made by Proposer to its clients/customers regarding steps that could be taken to prevent chiller equipment breakdown and enhance the efficiency and operation of chillers.
- (7) Describe the extent of Proposer's knowledge, experience, and expertise as a provider of services similar to the Services solicited under this RFP, including, but not limited to, Manufacturer's certified training in Carrier, McQuay, Multistack, Trane and York chillers.

7.3.2 Similar Services (100 Points).

Describe at least three situations ("**Projects**") where the Proposer has supplied similar services in scope, scale and complexity to the Services for the County requested under this RFP which are currently being provided or have been completed with the last two years, including similar services provided for governmental agencies or private sector owners. With respect to the Projects, the descriptions should describe:

- (1) The scope, scale and complexity of the services that were provided.
- (2) Names of the Proposer's Key Personnel assigned to each Project.
- (3) Dates the services were/are being performed.
- (4) Description of any innovative approaches used to improve the services and prevent chiller equipment breakdown and enhance the efficiency and operation of chillers.
- (5) Proposer shall include with its Proposal a Reference Check Form (Attachment 5) completed with the name and phone number of the Project's facility manager or contract administrator responsible for the chillers being serviced for each of the Projects.

7.3.3 Key Personnel (100 Points).

Describe the Proposer's Key Personnel including a minimum of five Certified Technicians that Proposer will assign to supervise and provide the Services ("**Key Personnel**"). The Proposer shall demonstrate the ability and capacity of the Key Personnel to perform the Services by providing the following information:

- (1) Submit the names and résumés of the Key Personnel (submit as an appendix outside the page limit).
- (2) Describe the extent of the Key Personnel's experience and expertise as a provider of services similar to the Services solicited under this RFP, including, but not limited to, any Manufacturers' certified training in Carrier, McQuay, Multistack, Trane and York chillers. Submit copies of the training certifications held by the key personnel as issued by the Chiller Manufacturers (submit as an appendix outside the page limit).
- (3) Evidence that each Certified Technician has a minimum of five years of maintenance/repair experience similar to the Services under this RFP on one or more of the chillers manufactured by the Manufacturers.
- (4) Describe how Proposer will deal with illness, retirements, vacations and similar off-work situations by the Key Personnel so that there will always be a minimum of five Certified Technicians available to provide the Services required under this RFP.

7.3.4 Maintenance Plans (400 Points).

Submit a detailed and comprehensive Chiller maintenance plan ("**Maintenance Plan**") for each Chiller Group. Each Maintenance Plan should contain, but is not limited to: (i) a schedule of Proposer's proposed periodic service e.g. monthly, annual and overhaul, based upon each Chiller's Manufacturer's specifications and recommendations, industry standards and the specific situational operating conditions and requirements of the Chiller, (ii) a thorough description of the tasks to be performed, the time frame, and the proposed Certified Technician designated to provide the Services, and (iii) a description of any tools or techniques to be employed for the work. For illustrative purposes only, attached to this RFP as Attachment 6 is a sample form listing typical maintenance/repair items that could be incorporated in a Maintenance Plan. This sample form should not limit the form or content of any plan that Proposer may propose for its Maintenance Plans. Proposers are encouraged to: (a) edit, correct, change and expand the sample form to reflect the Proposer's expertise and experience in maintaining chillers so as to incorporate the requirements of items (i), (ii) and (iii) above, and (b) recommend additional services or actions that can assist the County in controlling maintenance costs and protecting its Chillers, including, but not limited to, adding services or equipment to increase Chiller efficiency and energy savings.

7.3.4 Cost (200 Points).

Submit the following: (i) a fixed, fully loaded, not to exceed monthly cost per Chiller for all the Services (except for Extra Work) described in this RFP for the first year of the Contract by completing Section A of the Cost Sheet attached as Attachment 4, (ii) a fixed, fully loaded, not to exceed hourly rate to be paid for all Extra Work for the first year of the Contract by completing Section B of the Cost Sheet (the County will reimburse the Contractor for the actual cost of parts and materials required for Extra Work). With respect to the costs:

- (1) Contractor will be permitted not more than one adjustment per year to the monthly cost per Chiller. The adjustment will be permitted on the anniversary date of the Contract. The adjustment will be limited to the lesser of (1) the increase in the Contractor's published rates charged to all clients for services similar to those services described in this RFP or (2) the increase in the **CPI**⁵ as of the anniversary date over the index prior to the commencement date of the Contract.
- (2) The Costs proposed by the Proposer shall be subject to a "**most-favored-customer clause**"⁶.

SECTION 8 – EVALUATION REVIEW AND SELECTION PROCESS

8.1 Evaluation Committee. The County will designate an evaluation committee ("**Evaluation Committee**", each member an "**Evaluator**") to review Proposals. The Evaluation Committee may seek input from subject experts.

8.2 Written Proposals Evaluation.

- (1) Each Evaluator will review and score each Proposal independently. For each Proposal Element (6.3.1 through 6.3.5), the Evaluator will develop a preliminary score based on their independent review of each Proposal and in consideration of the evaluation criteria.
- (2) Following the initial scoring of the Proposals, the Evaluators may meet to discuss scores arrived at independently and determine if any relevant information was overlooked during their initial review. After discussion of each written Proposal, Evaluators will be given an opportunity to assign a final score to each Proposal.
- (3) The final scores will be tallied and the sum of total scores assigned to each Proposal will reflect

⁵ "CPI" means the Consumer Price Index-All Urban Consumers (Portland-Salem), Base Period: 1982-84 = 100.

⁶ In the event of a cost decline, or should Contractor at any time, during the life of Contract, sell similar services, under similar quantity and delivery conditions, to the Services described in this RFP, at costs below those provided in the Contract, the Contractor will immediately extend such lower costs to the County.

the final total score for each written Proposal. The final total score will be used to develop a ranking of Proposals.

- (4) Unless the County elects to conduct oral interviews, the County will issue an intent to award letter to the highest scoring Proposer and proceed with negotiations as provided in Section 8.4 (4) below.

8.3 Oral Interview (Optional).

If determined to be in the interest of the County, the County may schedule oral interviews so the remaining Proposers with the highest total scores (not more than three) will meet with the Evaluation Committee. The County may include its subject experts at oral interview presentations. Additionally, the County may contact references identified by the Proposer in its proposal.

- (1) The Proposer shall have no more than 3 key personnel from its firm present at the oral interview. Twenty minutes will be allotted for the Proposer to discuss its Proposal and 40 minutes will be allotted for questions and answers following.
- (2) The Proposer may not present other information or graphics not previously addressed in the written Proposal.
- (3) The Proposer may not present or discuss changes to the submitted Proposal.
- (4) The County may contact all references listed in the Proposal to verify the qualification and performance claims of the Proposer under previous contract conditions and work situations.
- (5) After oral interviews are complete and references checked, if contacted, each Evaluator will independently rank the Proposals using the same Proposal Elements and Points used to evaluate the written Proposals. Unless the County elects to conduct discussions and solicit best and final offers ("BAFOs"), the County will issue an intent to award letter to the highest scoring Proposal and proceed with negotiations as provided in Section 8.5 below.

8.4 Optional Discussions and Solicitation of Best and Final Offer Proposals.

- (1) At its sole discretion, the County may engage in oral or written discussions with Proposers having the highest ranking (not more than three). The County may discuss Proposal technical content, schedules, deliverables and cost in order to: (i) inform potentially eligible Proposers of Proposal content considered deficient, (ii) notify eligible Proposers of parts of their Proposals for which the County would like additional information or clarification, and (iii) solicit BAFOs.
- (2) The County will base discussions with each Proposer on what the County determines necessary to obtain a BAFO proposal. Discussions may vary with each Proposer. The County may terminate discussions with the Proposers at any time. However, the County will offer each Proposer the same opportunity to discuss their Proposals before BAFO solicitation.
- (3) The County will provide notice to the Proposers of the due date and time by which Proposers shall submit a BAFO, the BAFO requirements, and the evaluation criteria and weight for scoring the BAFO. The Evaluation Committee will review and score each BAFO Proposal in accordance with the information provided to determine the final Proposal score and ranking.
- (4) Following receipt and evaluation of BAFO proposals, the County will issue an intent to award letter to the highest scoring proposal and proceed with contract negotiations as provided in Section 8.5 below.

8.5 Contract Negotiation.

- (1) After evaluation of the Proposals, the County will issue a notice of intent to award a contract to the Proposer whose Proposal is ranked highest. After expiration of any protest period or after the County has provided a final response to any protest (whichever date is later), the County intends to immediately negotiate the Contract with the highest ranked Proposer.
- (2) The County will negotiate consistent with stated County requirements. At its option, the County may choose to negotiate Contract terms and conditions including, but not limited to, costs, Maintenance Plans, operation procedures, and maintenance schedules.
- (3) The County may terminate negotiations if the Proposer is not negotiating in good faith or the County determines that further negotiations with the Proposer will not result in the parties agreeing to the terms and conditions of a final contract in a timely manner. Upon termination of

negotiations, the County may then commence serial negotiations with the next highest ranked Proposer. If such negotiations are unsuccessful, the County may select for further consideration other Proposals as provided above. After contract negotiations are complete, the County will notify the other Proposers in writing.

SECTION 9 – REQUIREMENTS.

9.1 Miscellaneous.

- (1) Proposal Period. Proposals shall remain valid for a period of 90 days following the Closing Time. All material submitted for any portion of this solicitation shall be the property of the County, and will not be returned to Proposers.
- (2) Compliance. The Proposer must be able to comply with County contract requirements, insurance requirements, and other federal, state, and local laws and regulations governing services purchased under the contract that will originate from this RFP.
- (3) Proposer Representations. By submitting a Proposal, Proposer represents to the County that:
 - A. Proposer has a minimum of five years' proven experience performing chiller inspection and maintenance services as specified in this RFP.
 - B. Proposer has the capacity to respond to requests for emergency service for the Chillers within a maximum of two hours or less from the time of notification by the County of the need for such service.
 - C. Proposer has a minimum of five Certified Technicians on staff to service the Chillers, all of who have: (i) at least five years experience providing inspection and maintenance services on chillers manufactured by Carrier, McQuay, Multistack, Trane or York, and (ii) the ability to pass the County Sheriff's background check.

9.2 Proposal Submission.

Proposers must submit one original and six complete copies of the Proposal to:

Multnomah County, CPCA
Attention: Nancy Walters, Senior Procurement Analyst
501 SE Hawthorne, Suite 400
Portland, OR 97214

no later than the Closing Time. Proposals must be time stamped at the CPCA Reception Desk by the stated Closing Time. All Proposals that are not time-stamped by the Closing Time shall be considered late and be rejected.

Proposals shall be submitted in a sealed envelope appropriately marked with the: (i) Proposal title (Chiller Maintenance and Repair Services), (ii) RFP number (P09-9582), and (iii) name and address of the Proposer. If the requested number of copies does not fit into an envelope, enclose all copies in a sealed box with an envelope attached on top with the appropriate information. Electronic or faxed submissions shall not be accepted.

9.3 Clarification or Protest of Specifications.

Any Proposer requiring clarification of the information or protesting any provision herein, must submit specific questions or protests to specifications in writing to:

Nancy Walters, Senior Procurement Analyst
Multnomah County, CPCA
501 SE Hawthorne, Suite 400
Portland, OR 97214-3587
Phone (503) 988-5111, Ext. 28763

The last day to submit questions or protests to specifications is no later than 4:00 p.m. on September 10, 2008. Questions may also be presented verbally at the pre-proposal conference. If the County determines that additional information or clarification is necessary, such information or clarification will be supplied in an addendum that will be sent by facsimile transmission, mail or e-mail to all persons or firms that: (i) received this RFP from CPCA, (ii) registered on the CPCA website for this solicitation, or (iii) attended the pre-proposal conference/walk-thru. All addenda shall have the same binding effect as though contained in the main body of this RFP. Oral instructions or information concerning the specifications of this RFP from County managers, employees or agents shall not bind the County. CPCA shall issue all addenda not less than five days prior to the Closing Time.

9.4 Cost of Preparation of Proposal.

Costs incurred by any Proposer in preparation of a Proposal to this RFP shall be the responsibility of the Proposer.

9.5 Protest of Disqualification or Award.

Proposers may protest the contract award or disqualification of a Proposal only for reason of a deviation from laws, rules, regulations, or procedures. Disagreement with the scoring by Evaluators may not be protested. The following procedure applies to Proposers who wish to protest a disqualification of a Proposal or award of the Contract:

- (1) All protests must be in writing and physically received by the CPCA Manager no later than 4:00 P.M. on the fifth working day after the postmarked notice of intent to award or disqualification. Address protests to:

Protest of Award or Disqualification to RFP No. P09-9582
Attention: CPCA Manager
Multnomah County, CPCA
501 SE Hawthorne, Suite 400
Portland, OR 97214

- (2) Protests must specify the grounds for the protest including the specific citation of law, rule, regulation, or procedure upon which the protest is based. As noted earlier, the judgment used in scoring by individual Evaluators is not grounds for protest.
- (3) Protests not filed within the time specified in Section 9.5 (1) above, or which fail to cite the specific law, rule, regulation, or procedure upon which the protest is based shall be dismissed.

9.6 Confidentiality.

Multnomah County is required to disclose non-exempt public documents pursuant to ORS 192.410-192.505). ORS 192.502(4) exempts the County from disclosing information submitted in response to an RFP where the information is such that it "should reasonably be considered confidential."

A Proposer who determines that information within a proposal meets the statutory requirement and desires that such information remain confidential shall mark the pages containing such information with the word "CONFIDENTIAL." If a Proposer marks every page of a proposal as "CONFIDENTIAL" the statutory requirement is not met; any proposal so marked will not be deemed to have been submitted in confidence and, upon request, the entire proposal will be disclosed.

The County will keep properly marked information confidential unless ordered to release the information and materials by the District Attorney pursuant to ORS 192.460.

NOTE: After award, the contract executed by the County and the successful Proposer will be a public document subject to disclosure. No part of the contract can be designated as confidential.

9.7 Cancellation.

The County reserves the right to cancel award of the Contract any time before execution of the Contract by both parties if cancellation is deemed to be in the County's best interest. In no event shall the County have any liability for the cancellation of award. The Proposer assumes the sole risk and responsibility for all expenses connected with the preparation of its Proposal.

9.8 Rejection of Proposals.

The County reserves the right to reject any or all Proposals to this RFP.

9.9 Disputes.

In case of any doubt or differences of opinions as to the items or service to be furnished hereunder, or the interpretation of the provisions of this RFP, the decision of the County shall be final and binding upon all parties.

9.10 Clarification of Proposals.

The County reserves the right to request clarification of any item in any Proposal or to request additional information necessary to properly evaluate a particular Proposal. All requests for clarification and responses shall be in writing. Except for requests and responses related to a clarification necessary to evaluate whether a Proposal has met minimum requirements, all requests for clarification and responses shall be provided to each Evaluation Committee member.

9.11 Publicity.

Any publicity giving reference to this Project, whether in the form of press releases, brochures, photographic coverage, or verbal announcement, shall be done only after prior written approval of the County.

9.12 Collusion.

A Proposer submitting a Proposal hereby represents to the County that: (i) no officer, agent, or employee of the County has a financial interest in such Proposal, (ii) that the Proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer, and (iii) the Proposer is competing solely on its own behalf without connection with, or obligation to, any undisclosed person or firm.

* * * * *

CHILLER LISTING AND LOCATIONS

Attachment 1

RFP P09-9582

BLDG CODE	FACILITY ADDRESS	CHILLER LOCATION	MANUFACTURER	MODEL	SERIAL	DESCRIPTION
CHILLER GROUP 1:						
B623	HILLSDALE LIBRARY 1525 SUNSET BLVD PORTLAND, OR	ROOF	CARRIER	30GTR040-E-520JV	2602F63664	CARRIER AIR COOLED RECIPROCATING BUILT 2003 40 TON, 208-3-60, R-22 AIR COOLED TOWER ON ROOF
B327	KELLY BLDG 4747 E. Burnside St. Portland, OR 97215	BASEMENT CHILLER ROOM	CARRIER	30-HS-70-F-510	0296F85963	CARRIER RECIPROCATING PACKAGE BUILT 1995 70 TON, 208-3-60, R22, air cooled tower on the roof.
B317	LIBRARY ADMIN BLDG. 205 NE RUSSELL ST. PORTLAND, OR 97212	ROOF	CARRIER	30GTN100-520KA	4699F6368	CARRIER COMFORT LINE RECIPROCATING 100 TON 208-3-60, R-22 AIR COOLED TOWER ON ROOF
B160	MCCOY BUILDING 426 SW STARK ST PORTLAND, OR 97204	10TH FLOOR ACROSS FROM FREIGHT ELEVATOR	TRANE	CG100C	U84345	TRANE RECIPROCATING BUILT 1990 100 TON, 208-3-60, R-22 WATER COOLED CONDENSER OPEN LOOP COOLING TOWER
B160	MCCOY BUILDING 426 SW STARK ST PORTLAND, OR 97204	10TH FLOOR ACROSS FROM FREIGHT ELEVATOR	MCQUAY	WHR100DW	700395AG22	MCQUAY RECIPROCATING BUILT 1990 100 TON, 208-3-60, R-22 WATER COOLED CONDENSER OPEN LOOP COOLING TOWER
B611	MIDLAND LIBRARY 805 SE 122ND AVE PORTLAND, OR 97204	BASEMENT ACCESS FROM STARK	CARRIER	30HR-090-F-510	0196F84342	CARRIER RECIPROCATING (PACKAGE) BUILT 1996 90 TON, 208-3-60, R-22 WATER COOLED CONDENSER OPEN LOOP COOLING TOWER
CHILLER GROUP 2:						
B314	INVERNESS JAIL 11541 NE INVERNESS DR PORTLAND, OR 97220	LOWER ROOF	CARRIER	30XA080-500	2806X25582	CARRIER SCREW MACHINE BUILT 2006 90 TON, 460-3-60, R-134A AIR COOLED

CHILLER LISTING AND LOCATIONS

Attachment 1

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CHILLER GROUP 3:

B314	INVERNESS JAIL 11541 NE INVERNESS DR PORTLAND, OR 97220	LOWER ROOF	YORK	YCAL00805C46XAASDTXXT XXLXXXX45	REHM8200AA	YORK SCROLL HERMETIC BUILT 1999 80 TON, 460-3-60, R-22 AIR COOLED
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CHILLER GROUP 4:

B425	YEON COMPLEX 1620 SE 190TH PORTLAND, OR 97233	BASEMENT CHILLER ROOM	TRANE	RTWA0804XC01C3DOWN	U98C09145	TRANE SCREW MACHINE BUILT 1998 250 TON, 460-3-60, R-22 WATER COOLED
B425	YEON COMPLEX 1620 SE 190TH PORTLAND, OR 97233	BASEMENT CHILLER ROOM	TRANE	RTWA0804XC01C3DOWN	U98609146	TRANE SCREW MACHINE BUILT 1998 65 TON, 460-3-60, R-22 WATER COOLED

CHILLER GROUP 5

B311	JUVENILE JUSTICE CTR 1401 NW 68TH AVE PORTLAND, OR 97212	CENTRAL PLANT BLDG	CARRIER	23SXL1011NC20	470004	CARRIER SCREW MACHINE BUILT 1993 250 TON, 460-3-6, R-22 WATER COOLED CONDENSER OPEN LOOP COOLING TOWER
B311	JUVENILE JUSTICE CTR 1401 NW 68TH AVE PORTLAND, OR 97212	CENTRAL PLANT BLDG	CARRIER	23XL1011NC20	521324	CARRIER SCREW MACHINE BUILT 1995 250 TON, 460-3-60, R-22 WATER COOLED CONDENSER OPEN LOOP COOLING TOWER
B311	JUVENILE JUSTICE CTR 1401 NW 68TH AVE PORTLAND, OR 97212	CENTRAL PLANT BLDG	CARRIER	23XL1011NC20	470014	CARRIER SCREW MACHINE BUILT 1993 250 TON, 460-3-60, R-22 WATER COOLED CONDENSER OPEN LOOP COOLING TOWER

CHILLER LISTING AND LOCATIONS

Attachment 1

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CHILLER GROUP 6

B101 COUNTY COURTHOUSE BASEMENT CHILLER YORK YSDCDBS2CJBS SNDM844640 YORK SCREW MACHINE
1021 SW 4TH AVE ROOM
PORTLAND, OR 97204
BUILT 1995
300 TON, 208-3-60, R-22
WATER COOLED CONDENSER
OPEN LOOP COOLING TOWER

B101 COUNTY COURTHOUSE BASEMENT CHILLER YORK YSDCDBS2CJBS SNDM844530 YORK SCREW MACHINE
1021 SW 4TH AVE ROOM
PORTLAND, OR 97204
BUILT 1995
300 TON, 208-3-60, R-22
WATER COOLED CONDENSER
OPEN LOOP COOLING TOWER

CHILLER GROUP 7

B119 JUSTICE CENTER 9TH FLOOR MULTISTACK JF017175 MULTISTACK (4)-COMPRESSOR CENTRIFUGAL
1120 SW 3RD AVE MECHANICAL
PORTLAND, OR 97204 ELEVATOR ACCESS
BUILT 2006
320 TON, 460-3-60, R-134A
WATER COOLED

B119 JUSTICE CENTER 9TH FLOOR MULTISTACK JF016874 MULTISTACK (4)-COMPRESSOR CENTRIFUGAL
1120 SW 3RD AVE MECHANICAL
PORTLAND, OR 97204 ELEVATOR ACCESS
BUILT 2006
320 TON, 460-3-60, R-134A
WATER COOLED

CHILLER GROUP 8

B503 MULTNOMAH BLDG ROOF PENTHOUSE MCQUAY STNU070200256 MCQUAY DUAL COMPRESSOR CENTRIFUGAL
501 SE HAWTHORNE
PORTLAND, OR 97214
BUILT 2006
165 TON, 460-3-60, R-134A
WATER COOLED CONDENSER
OPEN LOOP

B503 MULTNOMAH BLDG ROOF PENTHOUSE MCQUAY STNU06080074 MCQUAY DUAL COMPRESSOR CENTRIFUGAL
501 SE HAWTHORNE
PORTLAND, OR 97214
BUILT 2006
165 TON, 460-3-60, R-134A
WATER COOLED CONDENSER
OPEN LOOP

CHILLER GROUP 9

B452 WAPATO JAIL 2ND FLOOR YORK YTH3A4C3-CMJ J-FMLM023182 YORK MILLENNIUM CENTRIFUGAL YT
14355 N BYBEE LAKE CT CHILLER ROOM
PORTLAND, OR 97203
BUILT 2004
65 TON, 460-3-60, R-123
WATER COOLED

Attachment 2

PERFORMANCE AND MAINTENANCE BOND

Bond Number: _____

Project Title: Multnomah County Service Agreement for Chiller Services

KNOW ALL MEN BY THESE PRESENTS: That _____, as PRINCIPAL (CONTRACTOR), and _____, (SURETY), licensed to do business as such in the State of Oregon, hereby bind themselves and their respective heirs, executors, administrators, successors, and assigns unto Multnomah County, a constitutionally chartered municipal corporation, (OWNER), as obligee, in the penal sum of ONE MILLION and 00/100 DOLLARS (\$1,000,000.00) for the payment whereof CONTRACTOR and SURETY bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

WHEREAS,

CONTRACTOR has entered into a Service Contract dated _____, 2008 ("Contract") with OWNER for chiller maintenance services, all as more particularly described in the Contract, which Contract, including any present or future amendment thereto, is incorporated herein by reference.

NOW, THEREFORE, THE CONDITION OF THIS OBLIGATION is such that, if CONTRACTOR shall promptly and faithfully perform said Contract, including, but not limited to, all duly authorized changes thereto, according to all the terms thereof, and, further, shall defend, indemnify, and hold harmless OWNER from all damages, loss and expense occasioned by any failure whatsoever of said CONTRACTOR and SURETY to fully comply with and carry out each and every requirement of the Contract, then this obligation shall be void; otherwise, it shall remain in full force and effect.

WAIVER. That SURETY, for value received, hereby expressly agrees that no change, extension of time, alteration or addition to the terms of the Contract or to the work to be performed thereunder, shall in any way affect the obligations of this Bond; and it does hereby waive notice of any such change, extension of time, or alteration or addition to the terms of the Contract or the work to be performed thereunder.

Nonpayment of the bond premium will not invalidate this bond nor shall Multnomah County be obligated for the payment of any premiums.

This bond is given and received under authority of ORS Chapter 279C, the provisions of which hereby are incorporated into this bond and made a part hereof.

IN WITNESS WHEREOF, WE HAVE CAUSED THIS INSTRUMENT TO BE EXECUTED AND SEALED BY OUR DULY AUTHORIZED LEGAL REPRESENTATIVES.

IN WITNESS WHEREOF, the above parties have executed this instrument the ____ day
of _____, 2008.

CONTRACTOR

Name, address and facsimile number of Contractor

I hereby certify that I have authority to execute
this document on behalf of Contractor.

By: _____
Title: _____

SURETY

Name, address and facsimile number of Surety:

I hereby certify that (1) I have authority to execute
this document on behalf of Surety; (2) Surety has
an A.M. Best rating of A-, V, or better; (3) Surety is
named in the current list of "Companies Holding
Certificates of Authority as Acceptable Sureties on
Federal Bonds and as Acceptable Reinsuring
Companies" as published in Circular 570 (most
current revision) by the Financial Management
Service; Surety Bond Branch, U.S. Department of
the Treasury; and (4) Surety is duly licensed to
issue bonds in the State of Missouri and in the
jurisdiction in which the Project is located.

By: _____
Title: _____
Date: _____

(Attach seal and Power of Attorney)

Attachment 3

PROPOSER REPRESENTATIONS AND CERTIFICATIONS

FAILURE OF THE PROPOSER TO COMPLETE AND SIGN THIS FORM MAY RESULT IN REJECTION OF THE PROPOSAL

The undersigned, having full knowledge of the specifications for the goods or services specified herein, offers and agrees that this Proposal shall be irrevocable for at least 90 calendar days after the date the Proposal is due, and if accepted, to furnish any and/or all goods or services as described in the Proposal at the prices offered and within the time specified.

PROPOSER NAME: _____

ADDRESS: _____

PHONE #: _____ FAX #: _____ WEB SITE: _____

TAXPAYER ID NUMBER: _____ DATE/STATE OF INCORPORATION: _____

BUSINESS DESIGNATION: ☐ Corporation ☐ Sole Proprietor ☐ Partnership ☐ S Corporation
☐ Non-Profit ☐ Government ☐ Other _____

PROPOSER IS REGISTERED TO DO BUSINESS IN OREGON: Yes _____ No _____

If answer is NO, the undersigned agrees to become registered in Oregon prior to contracting. Visit <http://www.filinginoregon.com>.

OREGON M/W/ESB CERTIFICATION: No. _____ ☐ Minority Owned ☐ Woman Owned ☐ Emerging, Small ☐ N/A

PROPOSER IS EEO CERTIFIED (through the City of Portland, OR): No _____ Yes _____ Expiration Date _____

ASSURANCES - The Proposer attests that:

1. The person signing this Proposal has the authority to submit the Proposal and to represent Proposer in all phases of this procurement process;
2. The information provided herein is true and accurate;
3. The Proposer is a resident proposer, as described in ORS 279A.120, of the State of _____, (insert State) and has not discriminated against any minority, women, or emerging small business enterprises in obtaining any required subcontracts, in accordance with ORS 279A.110;
"Resident bidder" means a bidder that has paid unemployment taxes or income taxes in this state during the 12 calendar months immediately preceding submission of the bid, has a business address in this state and has stated in the bid whether the bidder is a "resident bidder". ORS 279A.120 (1) (b);
4. Any false statement may disqualify this Proposal from further consideration or be cause of contract termination; and,
5. The Proposer will notify the CPCA Manager within 30 days of any change in the information provided on this form.

CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS - The Proposer certifies to the best of its knowledge and belief that neither it nor any of its principals:

1. Are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from submitting bids or proposals by any federal, state or local entity, department or agency;
2. Have within a five-year period preceding the date of this certification been convicted of fraud or any other criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) contract, embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are presently indicted for or otherwise criminally charged with commission of any of the offenses enumerated in paragraph 2. of this certification;
4. Have, within a five-year period preceding the date of this certification had a judgment entered against Proposer or its principals arising out of the performance of a public or private contract;
5. Have pending in any state or federal court any litigation in which there is a claim against Proposer or any of its principals arising out of the performance of a public or private contract; and
6. Have within a five-year period preceding the date of this certification had one or more public contracts (federal, state, or local) terminated for any reason related to contract performance.

Where Proposer is unable to certify to any of the statements in this certification, Proposer shall attach an explanation to this Certification. The inability to certify to all of the statements shall not necessarily preclude Proposer from award of a contract under this procurement.

SIGNATURE OF AUTHORIZED PERSON

Signature _____ Date _____

Print Name & Title _____

Contact Person for this procurement: _____

Phone _____ Email _____

**Attachment 4
COST SHEET**

RFP P09-9582

SECTION A : MONTHLY CHILLER COST

BLDG CODE	BUILDING ADDRESS	MANUFACTU RER	MODEL	SERIAL	MONTHLY SERVICE COST
CHILLER GROUP 1:					
B623	HILLSDALE LIBRARY	CARRIER	30GTR040-E-520JV	2602F63644	
B327	ISD KELLY BLDG	CARRIER	30-HS-70-F-510	0296F85963	
B317	LIBRARY ADMIN BLDG.	CARRIER	30GTN100-52OKA	4699F6368	
B160	MCCOY BUILDING	TRANE	CG100C	U84345	
B160	MCCOY BUILDING	MCQUAY	WHR100DW	700395AG22	
B611	MIDLAND LIBRARY	CARRIER	30HR-090-F-510	0196F84342	
CHILLER GROUP 2:					
B314	INVERNESS JAIL	CARRIER	30XA080-500	2806X25582	(See Note Below)
CHILLER GROUP 3:					
B314	INVERNESS JAIL	YORK	YCAL00805C46XAASDTXXT XXLXXX45	REHM8200AA	
CHILLER GROUP 4:					
B425	YEON COMPLEX	TRANE	RTWA0804XC01C3DOWN	U98C09145	
B425	YEON COMPLEX	TRANE	RTWA0804XC01C3DOWN	U98609146	
CHILLER GROUP 5					
B311	JUVENILE JUSTICE CTR	CARRIER	23SXL1011NC20	470004	
B311	JUVENILE JUSTICE CTR	CARRIER	23XL1011NC20	521324	
B311	JUVENILE JUSTICE CTR	CARRIER	23XL1011NC20	470014	
CHILLER GROUP 6					
B101	COUNTY COURTHOUSE	YORK	YSDCDBS2CJBS	SNDM844640	
B101	COUNTY COURTHOUSE	YORK	Y5DCCB52CJBS	SNDM844530	
CHILLER GROUP 7					
B119	JUSTICE CENTER	MULTISTACK	MS801T1H2W	JF017175	
B119	JUSTICE CENTER	MULTISTACK	MS80T1H2W	JF016874	
CHILLER GROUP 8					
B503	MULTNOMAH BLDG	MCQUAY	WMC035TTT-ER10	STNU070200256	
B503	MULTNOMAH BLDG	MCQUAY	WMC035TTT-ER10	STNU06080074	
CHILLER GROUP 9					
B452	WAPATO JAIL	YORK	YTH3A4C3-CMJ	J-FMLM023182	
TOTAL					

SECTION B: PROVIDE HOURLY RATE FOR EXTRA WORK

\$ /hour

NOTE: This Chiller is currently covered by the manufacture's (Carrier) warranty. The warranty does not expire until August 25, 2011. The cost proposed for this Chiller should reflect the existence of this warranty.

Attachment 5
REFERENCE CHECK

Section 1. Instructions: The Proposer shall complete the blanks in this Section 1 for each reference provided. The County may contact each reference provided and ask the questions listed below.

Proposer's Name: _____

Name of Reference: _____

Project Name: _____

Dates of Project: _____

Contact Person & Title: _____

Contact Phone: _____

-----PROPOSER -- DO NOT WRITE BELOW THIS LINE-----

Section 2. For use by County.

DATE: _____ **INTERVIEWER:** _____

Multnomah County would like to ask a few questions about the Proposer, who has submitted your name as a reference for our project which will involve: Chiller inspection and maintenance services.

QUESTION #1: Has the Proposer provided chiller inspection & maintenance services for your organization in accordance with the contract's terms?

☐ Yes ☐ No **Comments:**

QUESTION #2: Was work professionally executed by the Proposer?

☐ Yes ☐ No **Comments:**

QUESTION #3: Was emergency and routine work completed on time as far as the Proposer could control?

☐ Yes ☐ No **Comments:**

QUESTION #4: Was the work completed in accordance with the contracted terms?

☐ Yes ☐ No **Comments:**

QUESTION (5): Did the Contractor provide only manufacturer certified technicians to repair the chillers or perform the required services?

☐ Yes ☐ No **Comments:**

QUESTION (6): Would you use this Contractor again to provide these inspection/maintenance services?

☐ Yes ☐ No **Comments:**

Attachment 6

SAMPLE MAINTENANCE PLAN ITEMS

Monthly Service— Performed between May thru October

1. Log operating hours
2. Log starts
3. Log oil level
4. Log oil sump pressure
5. Log oil sump temperature
6. Log bearing temperature(s)
7. Log oil supply pressure
8. Inspect control center before starting machine
9. Vacuum inside of control center for dust
10. Tighten all connections in control center
11. Check starter wiring and contacts
12. Clean and dry all contacts
13. Tighten electrical terminations
14. Start machine and run diagnostic tests under load
15. Observe operation; note any unusual symptoms, e.g. such as vibration or noise
16. Check control, power and piping
17. Measure and test volts, current, or amp draw
18. Check refrigerant charge
19. Check gauges and indicator lights
20. Log chilled water/brine in temperature
21. Log chilled water/brine discharge temperature
22. Log CHW/brine flow Delta P
23. Log cooler refrigerant temperature
24. Log cooler pressures
25. Log cooler leaving differential
26. Log condenser water entering temperature
27. Log condenser water leaving temperature
28. Log condenser water flow Delta P
29. Log condenser water pump Delta P
30. Log condenser refrigerant temperature
31. Log condenser pressure
32. Log purge exhaust frequency
33. Log purge water accumulation quantity
34. Perform Eddy current test
35. Perform vibration analysis
36. Lubricate equipment
37. Clean up work station
38. Send copy of log & analysis data to Contract Administrator within 48 hours.

Annual Service— Performed between November thru March

1. Leak check with leak detector
2. Secure circuits (lock out and tag)
3. Review and evaluate log readings
4. Pull refrigerant sample for analysis
5. Provide a copy of Lab Report to Contract Administrator
6. Calibrate safety controls
7. Calibrate chilled water low temp cutout
8. Calibrate oil low pressure cutout
9. Calibrate operating controls
10. Drain compressor oil, remove, and replace with new oil
11. Inspect oil pump and motor assembly
12. Clean oil reservoir/oil pump sump
13. Replace oil filter
14. Check vent piping at valve outlet on Screw Machines for any evidence of internal corrosion or rust, dirt, scale, or leakage
15. Inspect the entering and leaving condenser water sensors for signs of corrosion or scale
16. Replace sensor if corroded or remove any scale if found
17. Drain water from condenser box
18. Remove condenser heads
19. Clean/brush condenser tubes
20. Reassemble condenser heads
21. Clean all unit Air Cooled condensers to manufacturer's specifications
22. Inspect starter ARC shields
23. Inspect starter capacitors
24. Inspect starter coil faces
25. Inspect starter linkages
26. Inspect starter resistors
27. Inspect starter transformers
28. Inspect starter wire insulation
29. Replace refrigerant and venture filters
30. Replace drier cores (W/A) during initial scheduled preventative maintenance cycle. Insure drier cores have isolation valves (install if necessary) so that future preventative maintenance checks can be performed without having to isolate refrigerant charge
31. Remove motor leads
32. Restore power
33. Leak check any joint, flange, etc. and repair all service joint leaks disassembled during maintenance
34. If there is a LED display reset to zero
35. Clean up work station
36. Send status report within 48 hours.

Overhaul Service— Performed as agreed when needed

1. Inspect/replace relief valves, oil system, etc.
2. Inspect/clean evaporator tube
3. Inspect cooling tower for water quality and corrosion
4. Inspect electrical connections and wiring, meg motor to record insulation value for optimal operation
5. Check lubrication oil in compressor for moisture or contaminants
6. Inspect chilled water, condenser water, and/or system pumps, lubricate pump and motor bearing, check seals, meg the motor to record motor insulation value per manufacturer's recommendations
7. Inspect refrigerant monitor, replace filters, test operation per manufacturer's recommendations
8. Check sensor calibrations on the microprocessor controls, verify that actual operations match performance specifications
9. Collect compressor oil sample for lab analysis
10. Correct all deficiencies and complete all actions necessary
11. Send copy of lab analysis, chiller status report, corrected deficiencies and completed actions to Contract Administrator within 48 hours