Office for People With Developmental Disabilities

KATHY HOCHUL
Governor
WILLOW BAER
Commissioner

# OPWDD Contract Management Unit on behalf of:

# Sunmount Developmental Disabilities State Operations Office

# 2026 - 2031 Heating, Ventilation, and Air Conditioning (HVAC) and Water Heater Inspections, Start Up, and/or Maintenance and Repair/Replacement Service in Clinton, Essex, Franklin, Hamilton, and St. Lawrence Counties

# SU 041426

# Invitation for Bid

**BID CONTENTS**

1. INTRODUCTION 3
2. DESIGNATED CONTACT PERSON(S) FOR INQUIRIES & SUBMISSION 3
3. TIMETABLE OF PROPOSAL DUE DATES 3
4. OBJECTIVE OF THIS IFB 3
5. GENERAL DESCRIPTION OF SERVICES 4
6. SITE INSPECTIONS 4
7. NOTICE TO POTENTIAL BIDDERS 4
8. TERM OF THE CONTRACT 4
9. PAYMENT 4
10. WAGE AND HOURS PROVISIONS 4
11. SUBCONTRACTING 5
12. INSURANCE 5
13. SUBMISSION OF PROPOSALS 6
A. Submission Requirements 6
B. References 6
C. Late Bids 6
14. PROCUREMENT INFORMATION, MANDATORY REQUIREMENTS 7
A. Procurement Lobbying Law Requirements pursuant to State Finance Law §§ 139-j and 139-k 7
B. Questions Regarding this Procurement 7
C. OPWDD Rights 8
D. Incurred Costs 9
E. Content of Proposals 9
F. Period of Validity 9
G. Notice of Award, Debriefing and Bid Protests 9
H. Public Information Requirements / Confidentiality / Publication Rights 10
I. Affirmative Action 11
J. Prime Contractor's Responsibility 11
K. Public Officer's Law Requirements 11
L. Omnibus Procurement Act 12
M. Contract Execution 12
N. Vendor Responsibility Questionnaire 12
O. Health Information Portability and Accountability Act (HIPAA) 13
P. General Duties and Additional Responsibilities 13
Q. NYS Information Security Breach and Notification Act (NYS Technology Law, § 208) 13
R. Nondiscrimination in Employment in Northern Ireland: MacBride Fair Employment Principles 14
S. Bidder's Certification of Compliance with State Finance Law § 139-k (5) 14
T. Bidder's Affirmation of Understanding and Agreement pursuant to State Finance Law § 139-j (3) and § 139-j (6)(b) 14
U. Bidder Disclosure of Prior Non-Responsibility Determinations 14
V. Non-Collusive Bidding Certification 15
W. Public Officers Law Certification 15
X. Bidder's Affirmation of Understanding Pursuant to State Labor Law § 201-g 16
Y. bidder's affirmation of understanding pursuant to new york state finance law §139-m 16
15. CONSUMER SAFETY INFORMATION 16
16. CONSULTANT DISCLOSURE 17
17. EVALUATION CRITERIA: METHOD OF AWARD 17
QUALIFICATIONS & SCOPE OF WORK 18
COST PROPOSAL FORM 32
NO-BID FORM 38

**ADDITIONAL REQUIRED FORMS (MUST BE SUBMITTED WITH BID OR WITHIN 3 BUSINESS DAYS OF REQUEST BY OPWDD. FAILURE TO SUBMIT THESE FORMS WILL RESULT IN BID DISQUALIFICATION):**

ATTACHMENT 1: References
ATTACHMENT 2: Vendor Responsibility Questionnaire

**REFERENCE MATERIAL**

Contract Template with Appendix A & Supplement

## 1. Introduction

The New York State Office for People with Developmental Disabilities (hereinafter "OPWDD") has the authority to provide care, treatment, rehabilitation, education, training and support services to developmentally disabled persons. OPWDD is also empowered to take all actions necessary, desirable, and proper to carry out its purposes and objectives within budgetary amounts made available by appropriations. Sunmount Developmental Disabilities State Operations Office (hereinafter "OPWDD") is an agency of OPWDD serving Clinton, Essex, Franklin, Hamilton, Jefferson and St. Lawrence counties.

OPWDD contracts with numerous organizations to provide these required services and other physical benefits. Such contracts may be with not-for-profit or for-profit organizations as well as with other governmental organizations.

## 2. Designated Contact Person(s) For Inquiries & Submission

**Jennifer Vallely, Contract Management Specialist 1 for**
**Christopher Davis, Contract Management Specialist 2**
**Laura Pushkarsh, Associate Director of Contracts**
**Deborah Klase, Associate Director of Contracts**
**OPWDD Contract Management Unit**
**26 Center Circle**
**Wassaic, New York 12592-2637**
**Phone: 845-877-6821 ext. 3333 Fax: 845-877-3004**
**eny.nyc.li.contracthub@opwdd.ny.gov**

## 3. Timetable of Proposal Due Dates

| | |
|---|---|
| IFB Release Date | 3 March 2026 |
| Final Date for Receipt of Questions | 20 March 2026 |
| Official Responses to Questions By | 27 March 2026 |
| **Proposal Due Date – Bid Opening*** | **2:00pm, 14 April 2026** |
| Evaluation & Selection | 28 April 2026 |
| Notification of Awards | 28 April 2026 |
| Contract start date (subject to change) | 01 August 2026 |

*Bid Opening to be via Microsoft Teams. Please see page 6, Section 13.A. (4) for details.

**OPWDD has sole discretion to change the above dates.**

## 4. Objective of this IFB

The purpose of this IFB is to contract with responsive and responsible vendors interested in performing the tasks and services described within the section of this IFB identified as "Qualifications & Scope of Work."

## 5. General Description of Services

This IFB is for interested bidders to submit a bid for HVAC Services for OPWDD sites, according to the specifications, terms and conditions as enumerated in "Scope of Work" of this IFB.

## 6. Site Inspections

It is the Bidders obligation to visit any and all sites they wish to bid on. OPWDD will make **no allowance or concession** to the Bidder for any alleged misunderstanding or deception because of quality, character, location, or other conditions. It is the responsibility of the bidder to know the site(s) requirements based upon the service being requested. The telephone number for each site has been provided. It is the Bidders responsibility to set up an appointment with each House Manager to determine the specific requirements of all aspects of the sites in relation to the service to be provided.

## 7. Notice to Potential Bidders

Receipt of these bid documents does not indicate OPWDD has pre-determined any vendor qualifications to receive a contract award. Such determination will be made after the bid opening and will be based upon an evaluation of all bid submissions and compared to the specific requirements and qualifications contained in these bid documents.

## 8. Term of the Contract

The term of this contract will be defined in the Contract Agreement, but is anticipated to be a five-year contract, unless an amendment is mutually agreed upon by both parties and approved by the Office of the State Comptroller (OSC).

## 9. Payment

Prices are to remain constant for the initial year of the contract. At the completion of the initial year, OPWDD or the Contractor may give notice or request an annual price adjustment for the subsequent year. The notice or request must be submitted in writing 30 days prior to the contract anniversary date or renewal date. OPWDD has the sole discretion in determining the rate to be approved. The adjustment shall be based upon the "CPI-U", not seasonally adjusted, Northeast Region, all items - with the adjustment calculated on a 12-month percent change based on the month 60 days prior to the contract anniversary. Any price adjustment shall not exceed 3.0% per annum.

## 10. Wage and Hours Provisions

If this is a public work contract covered by Article 8 of the Labor Law or a building service contract covered by Article 9 thereof, neither Contractor's employees nor the employees of its subcontractors may be required or permitted to work more than the number of hours or days stated in said statutes, except as otherwise provided in the Labor Law and as set forth in prevailing wage and supplement schedules issued by the State Labor Department.

Pursuant to § 8 (220-I), Contractor and its subcontractors must be registered with the New York State Department of Labor (NYSDOL) and submit their Certificate of Contractor Registration at the time of the bid submission for any Article 8 project.

Pursuant to § 9 (A), Contractor and its subcontractors must pay at least the prevailing wage rate and pay or provide the prevailing supplements, including the premium rates for overtime pay, as determined by the State Labor Department in accordance with the Labor Law.

Pursuant to § 9 (A), Contractor and its subcontractors must provide OPWDD with a certified payroll when submitting an invoice for payment.

## 11. Subcontracting

No Subcontracting of services is allowed with this IFB without written permission of OPWDD. For further information, please see section 14 J.

## 12. Insurance

The Contractor agrees that without expense to the State, insurance will be maintained during the period of the proposal and contract, insurance of the kinds and in the amounts indicated, with insurance companies authorized to do such business in the State of New York, covering all operations under this proposal and contract.

A. The Contractor shall furnish to OPWDD a Certificate or Certificates in a form satisfactory to the Agency, showing compliance with the requirements of this section. The State of New York Office for People with Developmental Disability will be expressly named as additional insured on each policy in accordance with above. Certificates of insurance should be forwarded to the OPWDD with the signed agreement and thereafter annually on the contract anniversary date. Certificates shall state the policies shall not be changed or cancelled until 30 days written notice has been given to OPWDD. Required insurances are:

1) A policy covering the obligations of the successful bidder in accordance with the Workers' Compensation and Disability Law. The contract shall be void and of no effect unless the successful bidder procures such policy and maintains it during the period of the contract. The Workers Compensation Board website can be found here: www.wcb.ny.gov/

2) Policies covering bodily injury, liability and property damage of the types hereinafter specified, each with limits of liability not less than $1,000,000.00 for all damages arising out of bodily injury, including death at any time resulting there from, sustained by one person in any one accident, and subject to that limit for that person, and not less than $2,000,000.00 for all damages arising out of bodily injury, including death at any time resulting there from, sustained by two or more persons in any accident and not less than $2,000,000.00 for all damages arising out of injury or destruction of property.

   a. Contractor's liability insurance issued to and covering the liability of the successful bidder with respect to all work performed by them under the proposal and the contract.
   b. Protective liability insurance issued to and covering the liability of the people of the State of New York with respect to all operations under this proposal and the contract, by the successful bidder, including omissions and supervisory acts of the State.

## 13. Submission of Proposals

### A. Submission Requirements

**One (1) original** Bidder **Cost Proposal Form** is required to submit a bid. All proposals in response to this IFB must be received by OPWDD no later than the proposal due date and time.

One (1) original of each additional required form, as listed on page 2 (References and Vendor Responsibility Questionnaire), must be received either by the proposal due date or within 3 business days of request by OPWDD. It is strongly recommended that these additional forms are submitted by the proposal due date. Failure to submit the forms as specified above will result in the bid being disqualified.

1) **Overnight delivery can take a minimum of two (2) business days to be received by OPWDD. Bidders mailing their responses must allow sufficient mail delivery time to ensure receipt of their proposals by the Bid Opening Date listed on the cover page. Do not depend upon an expedited, "early AM," or similar delivery service to timely deliver to OPWDD.**

2) All proposals should be submitted in a sealed envelope with ***the following information clearly displayed on the exterior of the packaging:*** **Bidder's name and address; "Sealed Bid" with the IFB title; Proposal Due Date**

3) Proposals should be **mailed** or **hand delivered** to the following address:

OPWDD
Contract Management Unit – **IFB: SU 041426**
C/O Jennifer Vallely, CMS 1
26 Center Circle, Building 58, Service Building
Wassaic, New York, 12592-2637

4) Bid Opening will be done via Microsoft Teams following standard formal bid opening procedures. If bidders wish to "attend", they may do so by calling: **1-518-801-9699 at 2:00pm, 14 April 2026**. Bidders will be asked for a PHONE CONFERENCE ID. Enter Meeting ID 880 921 547 followed by the # sign.

All proposals and accompanying documentation become the property of OPWDD and ordinarily will not be returned.

### B. References

OPWDD may request bidders to submit work references that will verify that the bidder or its principals have at least three (3) years of relevant experience to complete the work as listed in Qualifications and Scope of Work. Upon request, bidders will have 3 business days to submit such references.

### C. Late Bids

Any Bid received at the specified location after the time specified will be considered a late Bid. A late Bid shall not be considered for award unless: (i) no timely Bids meeting the

requirements of the Bid Documents are received or, (ii) in the case of a multiple award, an insufficient number of timely Bids were received to satisfy the multiple award; and acceptance of the late Bid is in the best interests of the Authorized Users. Delays in United States mail deliveries or any other means of transmittal, including couriers or agents of the Authorized User shall not excuse late Bid submissions. Similar types of delays, including but not limited to, bad weather or security procedures for parking and building admittance shall not excuse late Bid submissions. Determinations relative to Bid timeliness shall be at the sole discretion of OPWDD.

## 14. Procurement Information, Mandatory Requirements

### A. Procurement Lobbying Law Requirements pursuant to State Finance Law §§ 139-j and 139-k

**Effective January 1, 2006**: Pursuant to State Finance Law §§ 139-j and 139-k, this solicitation includes and imposes certain restrictions on communications between OPWDD and Bidder during the procurement process. A Bidder is restricted from making contact from the earliest Notice of Intent to Solicit Offers through final award and approval of the Procurement Contract by OPWDD and, if applicable, the Office of the State Comptroller (OSC), to other than designated staff unless it is a contact that is included among certain statutory exceptions set forth in State Finance Law § 129-j (3)(a). Designated staff, as of the date hereof, is (are) identified in this solicitation.

**The designated contact person is listed in Section 2, 'Designated Contact Person(s) For Inquiries & Submission' of this solicitation. The Restricted Period for this procurement begins with the date of the advertisement in the NYS Contract Reporter and will end when the NYS Office of the State Comptroller has approved the contract. All contact during the Restricted Period regarding this procurement must be made with the OPWDD designated contact person.**

OPWDD employees are also required to obtain certain information when contacted during the restricted period and make a determination of the responsibility of the Bidder pursuant to these two statutes. Certain findings of non-responsibility can result in rejection for contract award. In the event of two findings within a four-year period, the Bidder is debarred from obtaining governmental Procurement Contracts. Bidders will be informed in writing of any preliminary OPWDD finding of non-responsibility and will be afforded administrative due process prior to a final determination being made.

### B. Questions Regarding this Procurement

All questions regarding this procurement must be submitted in writing, by fax, mail, or e-mail to the contact person listed in **Section 2, 'Designated Contact Person(s) For Inquiries & Submission'** of this solicitation. Questions that are emailed must be submitted via email address to eny.nyc.li.contracthub@opwdd.ny.gov, and should reference the IFB title name and number in the subject line of the email.

OPWDD will post official answers to the questions to the Contract Reporter and the OPWDD website by the date indicated in **Section 3, 'Timetable of Proposal Due Date'.**

If a bidder discovers a possible error in this IFB, immediately notify the contact person indicated in **Section 2 'Designated Contact Person(s) for Inquiries & Submission'**, of such error and request clarification, correction or modification to this document via email address eny.nyc.li.contracthub@opwdd.ny.gov. All inquiries concerning corrections must reference the IFB title and number in the subject line of the email, and cite the particular bid section and paragraph number in the body of the email. Prospective Bidders should note that any such notice must be given, and all clarification and exceptions including those relating to the term and conditions are to be resolved prior to the proposal submission deadline. If there is a substantial error, the entire bidders list will be notified and the IFB change will be posted on the Contract Reporter, as well as e-mail replies to all bidders. OPWDD shall make IFB modifications, provided that such modification would not materially benefit or disadvantage any particular bidder.

**C. OPWDD Rights**

1) OPWDD reserves the right to use any and all ideas presented in any response to the IFB. Selection or rejection of any proposal does not affect this right. OPWDD shall also have unlimited rights to disclose or duplicate, for any purpose whatsoever, all information or other work product developed, derived, documented or furnished by the Bidder under any agreement resulting from this IFB.

2) In the event of contract award, all documentation produced as part of the contract will become the exclusive property of OPWDD. OPWDD reserves a royalty free, non-exclusive, and irrevocable license to reproduce, publish, or otherwise use such documentation and to authorize others to do so.

3) OPWDD reserves the right to:

   a. Reject any or all proposals received in response to this IFB (Invitation for Bid);
   b. Withdraw the IFB at any time, at the agency's sole discretion;
   c. Make an award under the IFB in whole or in part;
   d. Disqualify any Bidder whose conduct or proposal fails to conform to the requirements of this IFB. Selection may also include such issues as past performance;
   e. Seek clarifications and revisions of proposals;
   f. Use proposal information obtained through site visits, management interviews and the State's investigation of a bidder's qualifications, experience, ability or financial standing, and any material or information submitted by the bidder in response to the agency's request for clarifying information in the course of evaluation and/or selection under the IFB;
   g. Bidders are cautioned to verify their Bids before submission, as amendments to Bids or requests for withdrawal of Bids received by the Commissioner after the time specified for the Bid opening, may not be considered;
   h. ***Prior to the bid opening***, amend the IFB specifications to correct errors or oversights, or to supply additional information, as it becomes available;
   i. ***Prior to the bid opening***, direct bidders to submit proposal modifications addressing subsequent IFB amendments;
   j. Change any of the scheduled dates, including start dates, stated herein upon notice to the Bidders;

k. Eliminate any mandatory, non-material specifications that cannot be complied with by all of the prospective bidders;
l. Waive any requirements that are not material;
m. Negotiate with the successful bidder within the scope of the IFB in the best interests of the state;
n. Conduct contract negotiations with the next responsible bidder, should the agency be unsuccessful in negotiating with the selected bidder;
o. Utilize any and all ideas submitted in the proposals received;
p. Unless otherwise specified in the solicitation, every offer is firm and not revocable for a period of 60 days from the bid opening; and,
q. Require clarification at any time during the procurement process and/or require correction of arithmetic or other apparent errors for the purpose of assuring a full and complete understanding of a bidders proposal and/or to determine a bidders compliance with the requirements of the solicitation.

**D. Incurred Costs**

The State of New York shall not be liable for any costs incurred by a Bidder in the preparation and production of a proposal. Any work performed prior to the issuance of a fully executed contract or delivery of an order by OPWDD to the Contractor will be done only to the degree the Contractor voluntarily assumes the risk of nonpayment.

**E. Content of Proposals**

To be considered responsive, a Bidder should submit complete proposals that satisfy all the requirements stated in this IFB. Proposals that do not include the listed required forms may be rejected as nonconforming.

**F. Period of Validity**

Each Bidder's Proposal must include a statement as to the period during which the provisions of the proposal will remain valid. All elements of the bid and proposal shall remain in effect for a minimum of 180 days.

**G. Notice of Award, Debriefing and Bid Protests**

1) The successful Bidder or its agent shall not make any news releases or any other disclosure relating to this contract award without the explicit approval of OPWDD.

2) OPWDD will notify all unsuccessful Bidders, at or about the time of bid award, of the fact that their proposals were not selected. Each unsuccessful Bidder may at that time request a debriefing by OPWDD as to why its proposal was not selected. The scope of such debriefings will ordinarily be limited to the strengths and weaknesses of the individual Bidder's proposal unless the contracts resulting from this procurement have been approved by OSC.

3) Bidders wishing to file protest of the awarding of a bid(s) must notify OPWDD, in writing, of their intent to protest the award within ten (10) working days of their receipt of notice of non-award. The protest should identify the name and number of the IFB and the award date; indicate the bidder's interpretation as to why they feel they were denied the award (i.e., summarize the deficiencies identified during the debriefing) and

state their justification for the bid protest. Bid protests must be mailed to NYS OPWDD, Contract Management Unit, 44 Holland Avenue, 3rd Floor, Albany, New York 12229-0001.

**H. Public Information Requirements / Confidentiality / Publication Rights**

1) All the proposals upon submission will become the property of OPWDD. Materials / documents produced by the Contractor in the fulfillment of its obligations under contract with OPWDD become the property of OPWDD unless prior arrangements have been made with respect to specific documents.

2) OPWDD will have the right to disclose all or any part of a proposal to public inspection based on its determination of what disclosure will serve the public interest. Upon approval of the contract by OSC, all terms of the contract become available to the public.

3) Prospective Bidders are further advised that, except for trade secrets and certain personnel information (both of which OPWDD has reserved the right to disclose), all parts of proposals must ultimately be disclosed to those members of the general public making inquiry under the New York State Freedom of Information Law (NYS Public Officers Law article 6) although proposal contents cannot ordinarily be disclosed by OPWDD prior to bid award.

   a. Should a Bidder wish to request exception from public access to information contained in its proposal, the Bidder must specifically identify the information and explain in detail why public access to the information would be harmful to the Bidder. Use of generic trade secret legends encompassing substantial portions of the proposal or simple assertions of trade secret interest without substantive explanation of the basis therefore will be regarded as non-responsive requests for exception from public access will not be considered by OPWDD in the event of a Freedom of Information request for proposal information is received

4) The bidder and OPWDD agree that all communications, until the effective date of the contract, shall be made in confidence, shall be used only for purposes of the contract, and that no information shall be disclosed by the recipient party except as required by Federal or State law.

5) The bidder shall treat all information, in particular information relating to OPWDD service recipients and providers, obtained by it through its performance under contract, as confidential information, to the extent that confidential treatment is provided under New York State and Federal law, and shall not use any information so obtained in any manner except as necessary to the proper discharge of its obligations and securement of its rights hereunder. Bidder is responsible for informing its employees of the confidentiality requirements of this agreement.

6) The Contractor may not utilize any information obtained via interaction with OPWDD in any public medium (media-radio, television), (electronic-internet), (print-newspaper, policy paper, journal/ periodical, book, etc.) or public speaking engagement without the official prior approval of OPWDD Senior Management. Contractors bear the responsibility to uphold these standards rigidly and to require compliance by their employees and subcontractors. Requests for exemption to this policy shall be made in

writing, at least 14 days in advance, to OPWDD Contract Management Unit, 44 Holland Avenue (3rd Floor), Albany, New York 12229.

7) The Contractor agrees that no brochure, news/media/press release, public announcement, memorandum, or other information of any kind regarding the Contract shall be disseminated in any way to the public, nor shall any presentation be given regarding the Contract without the prior written approval of the OPWDD, which written approval shall not be unreasonably withheld or delayed provided, however, that Contractor shall be authorized to provide copies of the Contract and answer any questions relating thereto to any State or federal regulators or, in connection with its financial activities, to financial institutions for any private or public offering.

## I. Affirmative Action

1) OPWDD is in full accord with the aims and effort of the State of New York to promote equal opportunity for all persons and to promote equality of economic opportunity for minority group members and women who own business enterprises, and to ensure there are no barriers, through active programs, that unreasonably impair access by Minority and Women-Owned Business Enterprises (M/WBE) to State contracting opportunities. OPWDD encourages business that are minority or woman owned, to become certified with Empire State Development.

2) Prospective Bidders to this IFB are subject to the provisions of Executive Law article 15-A and regulations issued there under.

3) Any contract in the amount of $25,000 or more which is awarded as a result of this IFB will be subject to all applicable State and Federal regulations, laws, executive orders and policies regarding affirmative action and equal employment opportunities.

4) All awardees are required to comply with OPWDD's Minority and Woman-Owned Business Enterprises (M/WBE) policy. For details on requirements and procedures, including documentation required for this solicitation, please refer to the Appendix A-Supplement.

## J. Prime Contractor's Responsibility

In the event the selected Bidder's proposal includes services provided by another firm, it shall be mandatory for the selected Bidder to assume full responsibility for the delivery for such items offered in the proposal. In any event, OPWDD will contract only with a Bidder, not the Bidder's financing institution or subcontractors. OPWDD reserves the right to review and approve all potential subcontractors. For subcontracts valued at $100,000 and over, the subcontractors must demonstrate financial integrity and stability. In these instances, the subcontractor must complete and execute a Vendor Responsibility Questionnaire. OPWDD shall consider the selected Bidder to be the sole responsible contact with regard to all provisions of the contract resulting from this IFB.

## K. Public Officer's Law Requirements

All Bidders and their employees must be aware of and comply with the requirements of the New York State Public Officers Law, and all other appropriate provisions of New York State Law and all resultant codes, rules and regulations from State laws establishing the standards

for business and professional activities of State employees and governing the conduct of employees of firms, associations and corporations in business with the State, and for applicable Federal laws and regulations of similar intent. In signing the proposal, each Bidder guarantees knowledge and full compliance with those provisions for any dealings, transactions, sales, contracts, services, offers, relationships, etc. involving the State and/or State employees. Failure to comply with those provisions may result in disqualification from the bidding process and in other civil or criminal proceedings as may be required or permitted by law. Public Officers' Law § 73 bars former State officers and employees from appearing, practicing, or rendering any services for compensation in relation to any matter before their former State agency for a period of two years from their date of termination. Additionally, there is a permanent bar against any such activity before any state agency in relation to any case, application, proceeding or transaction with which such officer or employee was directly concerned and personally participated or which was under his/her active consideration.

**L. Omnibus Procurement Act**

It is the policy of New York State to maximize opportunities for the participation of New York State business enterprises, including minority and women-owned business enterprises as bidders, subcontractors, and suppliers on its procurement contracts.

Information on the availability of New York State subcontractors and suppliers is available from the Department of Economic Development, Division for Small Business, Albany, New York 12245, Tel. 518.292.5100, Fax: 518.292.5884, email: opa@esd.ny.gov.

A directory of certified minority and women-owned business enterprises is available from the NYS Department of Economic Development, Minority and Women's Business Development Division, 633 Third Avenue 33rd Floor, New York, New York 10017, Tel. (646) 846-7364, email: mwbecertification@esd.ny.gov
website: https://ny.newnycontracts.com/FrontEnd/searchcertifieddirectory.asp

**M. Contract Execution**

Awards are not final and the resultant contract is not considered executed and binding until approved by the New York State's Attorney General and Office of State Comptroller (OSC).

**N. Vendor Responsibility Questionnaire**

State agencies are required under State Finance Law § 163 (3) (a) (ii), to ensure that contracts are awarded to responsible vendors. Such requirements include, but are not limited to, the Bidder's qualifications, financial stability, and integrity. The Vendor Responsibility Questionnaire is required for contracts $100,000 and over. OPWDD will require a complete Vendor Responsibility Questionnaire with your bid proposal if the contract resulting from this procurement is valued at $100,000 and over. Vendors/not-for-profit provider agencies are able to file the Vendor Responsibility Questionnaire (VRQ) online via the New York State VendRep System or may choose to complete and submit a paper questionnaire. To enroll in and use the New York State VendRep System, see the www.osc.state.ny.us/vendrep.

**O. Health Information Portability and Accountability Act (HIPAA)**

The Federal Department of Health and Human Services (HHS) established HIPAA Standards for Privacy of Individually Identifiable Health Information (The Privacy Rule). The Privacy Rule (45 CFR Part 160 and Subparts A and E of Part 164) provides the first comprehensive federal protection for the privacy of health information. The Privacy Rule is carefully balanced to provide strong privacy protections that do not interfere with patient access to, or the quality of, health care delivery. HIPAA has an impact upon how OPWDD and contractors will deal with protected health information of our consumers. Likewise, State Mental Hygiene Law § 33.13 requires disclosure of clinical records to be limited to that information necessary for health care providers to administer treatment.

**P. General Duties and Additional Responsibilities**

Maintain a level of cooperation with OPWDD necessary for the proper performance of all contractual responsibilities. Agree that no aspect of bidder performance under the Agreement will be contingent upon State personnel, or the availability of State resources, with the exception of all proposed actions of the bidder specifically identified in the Agreement as requiring OPWDD's approval, policy decisions, policy approvals, exceptions stated in the Agreement or the normal cooperation which can be expected in such a contractual relationship or the equipment agreed to by OPWDD as available for the project completion. Cooperate fully with any other contractor that may be engaged by OPWDD. Agree to meet periodically with OPWDD representatives to resolve issues and problems. Recognize and agree that any and all work performed outside the scope of the Agreement or without consent of OPWDD shall be deemed by OPWDD to be gratuitous and not subject to charge by the bidder.

**Q. NYS Information Security Breach and Notification Act (NYS Technology Law, § 208)**

"Contractor shall comply with the provisions of New York State Information Security Breach and Notification Act (General Business Law § 889-aa; State Technology Law § 208). Contractor's negligent or willful acts or omissions, or the negligent or willful acts or omissions of Contractor's agents, officers, employees, or subcontractors."

The "New York State Information Security Breach and Notification Act" requires entities that conduct business with New York State and own or license "private" data to notify state residents affected by any security breach that results in unauthorized acquisition of the data. "Private" data is defined as unencrypted computerized information that can identify the individual, combined with one of the following data elements: (a) social security number, (b) driver's license or non-driver identification number" or (c) financial account information such as credit card or debit cards numbers in combination with access codes or PIN numbers. (Private data is considered unencrypted when either identifying information or the data element is not encrypted or is encrypted with a key that has been acquired).

The Act authorizes the State Attorney General to sue a business violating the statute in order to recover damages for actual costs or losses, including consequential financial losses incurred by persons entitled to notification. If a business engages in knowing or reckless violations, the court can impose a civil penalty of the greater of $5,000 or $10 per instance of failed notification up to $150,000. The remedies provided by this section shall be addition to any lawful remedy available, possibly permitting private actions.

**R. Nondiscrimination in Employment in Northern Ireland: MacBride Fair Employment Principles**

In accordance with State Finance Law § 165, the bidder, by submission of this bid, certifies that it or any individual or legal entity in which the bidder holds a 10% or greater ownership interest, or any individual or legal entity that holds a 10% or greater ownership in the bidder interest has no business operations in Northern Ireland. If the bidder or any of its aforementioned affiliations has business operations in Northern Ireland, then they shall take lawful steps in good faith to conduct any business operations that it has in Northern Ireland in accordance with the MacBride Fair Employment Principles relating to nondiscrimination in employment and freedom of workplace opportunity regarding such operations in Northern Ireland, and shall permit independent monitoring of their compliance with such Principles.

**S. Bidder's Certification of Compliance with State Finance Law § 139-k (5)**

In accordance with New York State Finance Law § 139-k (5), the bidder, by submission of this bid, certifies that they are subject to the provisions of State Finance Law §§ 139-k and 139-j and all information provided to OPWDD with respect to State Finance Law § 139-k is complete, true, and accurate.

**T. Bidder's Affirmation of Understanding and Agreement pursuant to State Finance Law § 139-j (3) and § 139-j (6)(b)**

The bidder, by submission of this bid, certifies that it understands and agrees to comply with the procedures of OPWDD as it relates to permissible contracts as required by State Finance Law 139-j (3) and 139-j (6)(b).

**U. Bidder Disclosure of Prior Non-Responsibility Determinations**

New York State Finance Law § 139-k (2) obligates the Office for People With Developmental Disabilities (OPWDD) to obtain specific information regarding prior non-responsibility determinations with respect to State Finance Law §139-j. This information must be collected in addition to the information that is separately obtained pursuant to State Finance Law §163(9). In accordance with State Finance Law § 139-k, bidders must disclose whether there has been a finding of non-responsibility made within the previous four (4) years by any Governmental Entity due to: (a) a violation of State Finance Law § 139-j or (b) the intentional provision of false or incomplete information to a Governmental Entity. State Finance Law § 139-j sets forth detailed requirements about the restrictions on contacts during the procurement process. A violation of State Finance Law §139-j includes, but is not limited to, an impermissible contact during the restricted period (e.g., contacting a person or entity other than the designated contact person(s), when such contact does not fall within one of the exemptions).

As part of its responsibility determination, State Finance Law § 139-k (3) mandates consideration of whether a bidder fails to timely disclose accurate or complete information regarding the above non-responsibility determination. In accordance with law, no Procurement Contract shall be awarded to any bidder that fails to timely disclose accurate or complete information under this section, unless a finding is made that the award of the Procurement Contract to the bidder is necessary to protect public property or public health

safety, and that the bidder is the only source capable of supplying the required Article of Procurement within the necessary timeframe.

The bidder, by submission of its bid certifies that no government entity has made a finding of non-responsibility regarding the individual or entity seeking to enter into this procurement contract. If the individual or entity has had a finding of non-responsibility due to a violation of State Finance Law 139-j or due to the intentional provision of false or incomplete information submitted to a government entity, then the said individual or entity must provide a detailed statement regarding the finding.

Additionally, the bidder by submission of its bid certifies that no government entity has ever terminated or withheld a procurement contract from the individual or entity seeking to enter into this procurement contract due to the intentional provision of false or incomplete information. If the individual or entity has been terminated or withheld from a procurement contract, then said individual or entity must provide a detailed statement regarding the finding.

**V. Non-Collusive Bidding Certification**

In accordance with State Finance Law § 139-d, the bidder by submission of this bid certifies that they and each person signing on behalf of the bidder certifies, and in the case of joint proposal, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of his knowledge and belief:

1) The prices in this proposal have been arrived at independently, without collusion, consultation, communication, or agreement, for the purposes of restricting competition, as to any matter relating to such prices with any other bidder or with any competitor, and

2) Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to opening, directly or indirectly, to any other bidder or to any competitor; and

3) No attempt has been made or will be made by the bidder to induce any other person, partnership, or corporation to submit or not to submit a proposal for the purpose of restricting competition.

**W. Public Officers Law Certification**

In accordance with Public Officers Law § 73(4)(a)(i) no State employees shall sell any goods or services having a value in excess of twenty-five dollars to any State agency, unless such goods and services are provided pursuant to an award or contract letter after public notice and competitive bidding.

By submission of this bid, the bidder certifies that no employee, owner or individual otherwise associated with the bidder was ever a New York State officer or employee, or if they were ever or currently a New York State officer or employee, their organization pursued and awarded this contract through a competitive bidding process in compliance with the Public Officers Law 73(4)(a)(i).

Public Officers Law § 73(8)(a)(i) provides that no person who has served as a State officer or employee shall, within a period of two years after termination of such service or employment, appear or practice before such State agency or receive compensation for any services rendered by such former officer or employee on behalf of any person, firm, corporation, or association in relation to any case, proceeding, or application or other matter before such agency.

By submission of this bid, the bidder certifies that no employee, owner or individual otherwise associated with the bidder was ever a New York State officer or employee, or they are formerly a New York State officer or employee and any past employment with the State occurred prior to the two-year prohibition period and as a result their organization is in compliance with the Public Officers Law (8)(a)(i).

**X. Bidder's Affirmation of Understanding Pursuant to State Labor Law § 201-g**

By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that the bidder has and has implemented a written policy addressing sexual harassment prevention in the workplace and provides annual sexual harassment prevention training to all its employees. Such policy shall, at a minimum, meet the requirements of Labor Law § 201-g.

**Y. Bidder's Affirmation of Understanding Pursuant to New York State Finance Law §139-m**

In accordance with State Finance Law §139-m, by submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that the bidder has and has implemented a written policy addressing gender-based violence and the workplace and has provided such policy to all of its employees, directors and board members. Such policy shall, at a minimum, meet the requirements of subdivision 11 of section five hundred seventy-five of the executive law.

If the bidder cannot make the foregoing certification, such bidder shall so state and shall furnish with the bid a signed statement that sets forth in detail the reasons that the bidder cannot make the certification.

*(please see the https://opdv.ny.gov/gender-based-violence-and-workplace for more information regarding these policies)*

## 15. Consumer Safety Information

OPWDD provides services to individuals exhibiting Pica, which is a medical disorder characterized by an appetite for largely non-nutritive substances, e.g., cigarette butts, paper, gum, etc. Attention to the sanitation and cleanliness of the areas surrounding OPWDD's state operated program sites and residential buildings is very important to the health and safety of those we serve. Please ensure care is taken to properly dispose of cigarette butts and rubbish while on OPWDD property.

OPWDD property has special receptacles for cigarette butt disposal. Contractor and subcontractor employees shall use these receptacles and throw trash in garbage cans or dumpsters. Compliance with this policy is appreciated.

## 16. Consultant Disclosure

Effective June 19, 2006, contractors doing business with the State of New York in a "consulting" capacity will be required to file forms disclosing, by employment category, the number of persons employed by them and their subcontractors (if any) as a consulting firm or an individual consultant; the number of hours worked; and the monetary compensation received from the State of New York for work performed by these employees. Reporting will be required via the utilization of two separate forms – "Form A" and "Form B".

In general, however, Form A is to be completed once upon initial contract award and is used to report "planned employment". Form B is required annually and reports on "actual employment figures" for the preceding state fiscal year. The New York State fiscal year commences on April 1st and concludes on March 31st.

## 17. Evaluation Criteria: Method of Award

### A. Contract Award

OPWDD will select the responsible and responsive Bidder that will provide the lowest Total Annual Estimated Combined Cost per Cluster. There are four (4) clusters; each cluster will be evaluated separately. Vendors may bid on one or multiple clusters and multiple contracts may be awarded. All sites included in the cluster are to be serviced by the Bidder who is awarded the contract for that cluster. All bids must be submitted on an original Cost Proposal Form (pages 33 - 37). In the event of a tie bid, the award will be made by random selection. Random selection shall be made utilizing random.org/lists/

### B. Right to Reject

Only proposals judged to be responsive to the submission requirements set forth in this IFB will be evaluated. An incomplete Cost Proposal Form or any alteration to the Cost Proposal Form may result in your bid not being considered. OPWDD reserves the right to reject any and all offers.

### C. Mathematical Errors

If the Bidder submits a cost proposal which contains mathematical errors, the Total Annual Estimated Combined Cost per Cluster will be calculated using Annual Inspection, Start Up, and PM costs per site, labor rates per hour, and parts mark-up percentage. If a parts mark-up percentage exceeds the cap of 20%, the percentage will be reduced to 20% and the Total Annual Estimated Combined Cost per Cluster will be recalculated.

### D. Confirmation of Ability to Provide Service

OPWDD reserves the right to confirm any Bidder has the qualifications, experience, ability, and financial standing to perform services as outlined in the scope of work. This may include requesting information regarding equipment, workforce, suppliers, etc.

# Qualifications & Scope of Work

The Office for People With Developmental Disabilities (OPWDD) on behalf of the Sunmount Developmental Disabilities State Operations Office (DDSOO) requires a qualified Contractor to provide **Heating, Ventilation, and Air Conditioning (HVAC) and Water Heater Inspections, Start Up, and/or Maintenance and Repair/Replacement Service** for sites throughout Clinton, Essex, Franklin, Hamilton, and St. Lawrence counties. These community sites serve a developmentally disabled population including some people who are medically or physically disabled, as well as some who are confined to wheelchairs. A site listing with addresses, telephone numbers, and equipment is included in **Exhibit A-Site and Equipment List, pages 28-31.**

## I. GENERAL REQUIREMENTS:

A. Annual service inspections of air conditioning systems are to be performed between April 1st and May 15th of each contract year. Annual service inspections of heating systems and water heaters are to be performed between August 1st and September 30th of each contract year.

**ALL ANNUAL SPRING AIR CONDITIONING SERVICE INSPECTIONS MUST BE COMPLETED BY MAY 15TH OF EACH YEAR.**

**ALL ANNUAL FALL HEATING AND WATER HEATER SERVICE INSPECTIONS MUST BE COMPLETED BY SEPTEMBER 30TH OF EACH YEAR.**

B. A schedule of annual service inspections must be submitted in writing to the Plant Superintendent at the beginning of the contract. Prior to each season the Contractor must meet with the Plant Superintendent to go over the upcoming schedule and contract. The day of the service visit must have appropriate temperatures to enable service provision. The, prior to Contractor must schedule the visits for annual service inspection and start up with each House Manager service to ensure access to the residence.

C. Contractor shall utilize Preventive Maintenance (PM) directions, which indicate task functions to be performed on each scheduled service call.

D. As work is due, the Contractor shall issue to their mechanic on the job the necessary and appropriate recommended maintenance procedures and a listing of any special lubricants, tools, etc., which are required for proper maintenance of the apparatus concerned.

E. All miscellaneous materials, supplies (lubricants, belts, tools, test instruments, meters, filters, etc.), and equipment necessary to provide preventative maintenance shall be supplied by the Contractor and shall be included in the cost of the service program.

F. Broken and/or replaced parts and miscellaneous materials (rags, brushes, old oil, used speedy dry, etc.) used during the repair process of equipment are to be removed off site and disposed of properly. Broken parts may be requested to be turned over to the DDSOO for inspection.

G. During the service program, the Contractor shall advise and assist in the determination of improvements to the mechanical system that shall conserve energy and minimize utility expenditures.

H. **Qualifications of Service Technicians:** Contractor's personnel performing contract work in OPWDD facilities shall include one journeyman level supervisory technician and additional personnel only as necessary to perform the required work.

I. The Contractor's employees will adhere to all policies and regulations of the DDSOO, including but not limited to smoking, parking, etc.

J. The Contractor shall provide callback service within four (4) hours after receipt of a request for such service by telephone or otherwise from the DDSOO. Callback service shall be performed as part of this contract without additional charge. The Contractor shall provide the Work Control Center Supervisor with names and telephone numbers of persons to be contacted.

K. In the event the Contractor fails to provide services as stated in the Scope of Work, within the time frames specified, and OPWDD is required to procure services from another vendor, the Contractor may be held liable for any costs over and above the contractual price for the site(s) involved. In such a situation, the additional cost for these services will be billed to the Contractor or payment will be reduced for the additional costs incurred.

## II. WORKING HOURS:

A. The inspections, start up, and/or maintenance work to be performed under this scope of work shall be performed during the normal working hours from 8:00 am to 5:00 pm, Monday to Friday.

B. All repair/replacement work is to be performed during normal working hours unless specifically authorized in writing by the DDSOO.

C. Off Hours Labor hours are Monday to Friday, 5:01 pm – 7:59 am, and Saturday and Sunday, 12:00 am to 11:59 pm.

D. Holiday Labor hours are on the calendar holiday, not necessarily the observed day. Recognized Holidays are: New Year's Day, Birthday of Martin Luther King, Jr., Washington's Birthday, Memorial Day, Juneteenth, Independence Day, Labor Day, Columbus Day, Veterans Day, Thanksgiving Day, Christmas Day.

## III. REPAIR/REPLACEMENT AND EMERGENCY SERVICES:

A. Requests for work and approval of work performed shall only originate from the DDSOO Work Control Office. House Managers and staff are not authorized to request or approve the Contractor's services. The Contractor's work on-site in response to unauthorized requests are not payable unless subsequently approved by Work Control. Contractor may only invoice for one technician per billable hour of service unless pre-approval has been received from the DDSOO Work Control Office to invoice for additional technicians based on the size and

complexity of the required repair/replacement. Invoices submitted for multiple technicians per service call will be reduced to one technician per billable hour unless subsequently approved by Work Control. The signing of Contractor's job ticket by other than Work Control personnel shall only constitute an acknowledgment that Contractor has performed the services listed on the ticket and shall not constitute approval of the same.

B. Notification and cost estimate of needed non-emergency repairs/replacement beyond the inspection and maintenance must be faxed or emailed to the Work Control Center Plant Superintendent or designee (518) 359-4172 or Chase.V.Kavanagh@opwdd.ny.gov within 24 hours for approval before making additional repairs/replacement.

C. If an emergency repair/replacement is needed, the technician is to contact (518) 359-4171 from 8:00 am to 4:00 pm, Monday to Friday. Technician is to contact Safety, (518) 359-4497 after hours and on weekends and holidays. Emergency repairs/replacements may be authorized by phone.

D. The Contractor shall provide emergency service within four (4) hours after receipt of a request for such service by telephone or otherwise from the DDSOO. The DDSOO agrees to pay the Contractor for emergency repairs/replacements at the rate set forth in the Cost Proposal. Travel charges will not be paid. Payment for services shall apply only to the hours of service while at the site and not from the time of departure from the Contractor's office to the time of return to the Contractor's office. One billable hour of labor may be charged for any emergency repair/replacement service that takes less than one hour to complete.

E. In addition to Contractor's obtaining of House Manager/staff or Work Control signature on job tickets, Contractor shall sign in on house visitor's log on arrival at the site and sign out on the log upon departure from the site as evidence of time spent on the job. Failure to sign in and out on the house log shall limit payable job site time charges to two hours unless otherwise verifiable to the Work Control Supervisor's satisfaction.

F. Authorization to repair or replace systems or components over $1,000 must be authorized by the Work Control Center Plant Superintendent or designee. Supply Plant Superintendent a written cost estimate after verbal approval.

G. All tools, materials, and equipment needed for repair/replacement will be supplied by the Contractor and included in the contracted pricing.

## IV. DETAILED SPECIFICATIONS:

### A. Inspections/Servicing of Equipment – General PM

1. Examine each piece of equipment and device to see that it is functioning properly and is in good operational condition.
2. Complete cleaning of units and removal of dirt, debris, droppings, etc. in and around units.
3. Clean all components of dust, old lubricants, etc. to allow the equipment to function as designed.
4. Securing of loose conduits.
5. Reattachment of missing sheet metal covers on units.
6. Replacement of electrical conduit box and motor box covers and lids.

7. Reattaching all ground wiring.
8. Lubricate all equipment where needed to permit bearings, gears, and all contact wearing points to operate freely and without undue wear.
9. Start/run systems and equipment. Check overall performance.
10. Adjust all linkage, motors, drives, etc. that have drifted from the initial design settings and positions.
11. Calibrate all sensing, monitoring, output, safety, and read-out devices for proper ranges, settings, and optimum efficiencies.
12. Check output temperatures making any adjustments necessary to maintain appropriately balanced systems. Check internal pressures if performance deficiencies are detected.
13. Test and cycle all equipment as a system after it has been cleaned, lubricated, adjusted, and calibrated to assure that it is in proper operating condition and performing at optimum efficiency.
14. Cleaning of Coils: The standard for cleanliness for an acceptable coil is that the coil surface must be fully void of dirt and debris, and light must pass through the coil fins. Upon completion of the cleaning of the coils, the Contractor shall submit a signed worksheet denoting the coils that were cleaned, the pre-cleaned condition of the coils and an estimate of when the coils might require cleaning again.
15. Exercise all heating, cooling and domestic hot water system valves by fully opening and closing each valve on a regular schedule two times per year.
16. Clean and maintain all HVAC vents and fresh air intakes as necessary to keep them in good operating condition.

B. **Ducted Air Handling System(s)- PM**
   1. **If air handlers are utilized for both heating and cooling systems, they are to be serviced with the annual air conditioning service inspection and again with the annual heating and hot water service inspection.**
      a. Ensure duct systems are free of obstructions and can perform the required function. Work includes, but is not necessarily limited to the following:
         i. Inspect all ductwork for loose or missing insulation, where necessary, repair and/or replace. When this is discovered, contact the DDSO Work Control office for approval of work outside contract amount.
         ii. Inspect all ductwork for loose duct tape or access panels (that would allow air leakage); repair or replace as needed.
      b. Clean all blowers, air pumps, and accessories to provide for optimal airflow.
      c. Inspect and replace air filters. Ensure all air filters are clean, and spares are available on site.
         i. Filter Type: As required by manufacturer.
         ii. Filter Size(s): As required for each air handler.
         iii. Filter Rating: MERV 13, minimum or maximum rating allowable by air handler manufacturer.
         iv. Spare Filter Quantity: Provide twelve (12) as a set for each air handler annually.
      d. Vacuum out all supply and return diffusers. Where cold/heat air boxes exist, remove grills, and vacuum out boxes.
      e. Remove grills and vacuum all supply air registers.
      f. Check operation of supply, return, and exhaust fans making any adjustments and performing any lubrication and/or fan belt adjustment or replacement, if applicable.

g. Check proper operation of outside/return air mixing dampers and associated controls and wiring.
h. Check and lubricate blower motors and cages for proper operation.
i. Clean blower cages.
j. Clean heating and cooling coils with EPA approved non-corrosive coil cleaner.
k. Check integrity of drain pan. Provide and place biocide tablets in same.
l. Test run unit for proper operation.
m. Check air supply output at each grill, ensuring adequate air flow to the space. Note any issues on service report and contact the Plant Superintendent.
n. Check operation of volume dampers, balance system as necessary.
o. Check condensate drain and pump for proper operation, clean if necessary.
p. Provide biocide tablets and place in condensate pans.
q. Check operation of thermostat fan switch and all interfaced control systems for proper fan operation.

C. **Condensing Unit(s)- PM**

1. Annual Preventive Maintenance – One (1) time per year
   a. Check and inspect all electrical circuits and controls for proper operations.
   b. Inspect and clean heat exchangers.
   c. Check and ensure proper refrigerant charge. Replace or recharge as needed.
   d. Clean condenser and check operation of condenser fan.
   e. Clean coil with EPA approved non-corrosive coil cleaner.
   f. Check condition of expansion valve, if applicable.
   g. Check operation of crankcase heaters, if applicable.
   h. Connect gauges and check operating pressures.
   i. Record liquid line and suction line pressures.
   j. Check for signs of refrigerant leaks.
   k. Check all motor amperage draws.
   l. Record temperature differential across evaporator coil.
   m. Check evaporator suction line temperature.
   n. Lubricate moving parts as applicable.
   o. Check belts and adjust tension, if needed.
   p. Check pressure cut-out settings.
   q. Check start capacitors and potential relays, if applicable.
   r. Check compressor contactor.

D. **Ductless Split-System Air Handling Units and Air-Cooled Condensers (AC and AC/Heat Pump Types)- PM**

**1. When split-system air handling units and air-cooled condensers are used for both heating and cooling, they are to be serviced once in the spring and once in the fall as specified.**
   a. Complete manufacturers' maintenance checklists.
   b. Inspect, repair, or replace all mechanical, electrical, and electronic components, safety and control devices, interlocks, belts, bearings, gauges, gaskets, dryers, valves, and strainers as applicable.
   c. **Clean all renewable filters or replace if damaged. Replace disposable air filters.**
   d. Clean condensate drip pan and drain line.
   e. Check compressor, reversing valve and crank case heater operation.
   f. Check unit defrost and heat cycles for proper operation (winter only).

g. Check unit-cooling cycle for proper operation (summer only).
h. Check refrigerant levels, temperature, and pressures. Recharge or replace refrigerant as necessary.
i. Inspect and clean both indoor and outdoor coils.
j. Test run all units for proper operation.

E. **Roof Top HVAC Units- PM**

1. Annual Preventive Maintenance – One (1) time per year
   a. Inspect, calibrate, test, repair, or replace all mechanical, electrical, and electronic components, safety and control devices, interlocks, gauge, gaskets, dryers, oil heaters, valves, strainers, and control panel.
   b. Check general operating condition.
   c. Test for leaks using leak detector.
   d. Check capacity control components.
   e. Check condensate components.
   f. Check condenser fans.
   g. Check crankcase heaters.
   h. Check temperature differentials.
   i. Check dryer components.
   j. Check economizer.
   k. Check fan rotations.
   l. Check belts condition.
   m. Check heat exchangers.
   n. Record compressors and blowers' motors voltage and amperage.
   o. Record compressor oil pressure.
   p. Record compressor suction and discharge pressures.
   q. Refill refrigerant as necessary.
   r. Check oil acidity.
   s. Check superheat temperature.
   t. Pressure wash evaporator coils.
   u. Pressure wash air cooled condensers.
   v. Clean drain pans. Provide and place biocide tablets in same.
   w. Replace oil and oil filters.
   x. Replace filters with pleated type air filters.
2. Quarterly Preventive Maintenance – Four (4) times per year
   a. Check general operating condition.
   b. Replace with pleated air filters.
   c. Calibrate and adjust operating controls to manufacturer's specifications.
   d. Pressure wash condensers and evaporators coils as necessary.
   e. Check for leaks.
   f. Check motor voltage and amperage.
   g. Check superheat temperatures.
   h. Check belt condition.

F. **Furnace Inspections and Start Up Service- PM**

1. Annual Preventive Maintenance – One (1) time per year
   a. Check and inspect all electrical circuits and thermostats for proper operations. If thermostat requires batteries, replace yearly at start up service.

b. Inspect and clean heat exchanger.
c. Check and inspect spark igniter system for proper operations.
d. Inspect and clean all combustion exhaust vent piping to the point it enters the chimney.
e. Inspect and replace air filters. Ensure all air filters are clean, and spares are available on site.
    i. Filter Type: As required by manufacturer.
    ii. Filter Size(s): As required for each air handler.
    iii. Filter Rating: MERV 13, minimum or maximum rating allowable by air handler manufacturer.
    iv. Spare Filter Quantity: Provide twelve (12) as a set for each air handler.
f. Check gas valve for proper operation.
g. Inspect and clean pilot burner.
h. Check and lubricate blower motor and spiral cage for proper operation.
i. Test run unit for proper operation.
j. Test all safety circuits for proper operation.
k. Clean spiral cage on blower.
l. Clean and inspect barometric damper and flue piping.
m. Combustion efficiency, smoke, and CO2 test unit.
n. Check and inspect humidifier for proper operation, including but not limited to verifying associated controls and accessories, changing filter media, and switching bypass dampers.

2. Additional service required during annual PM for oil-fired furnace:
    a. Clean and adjust electrodes.
    b. Clean and inspect burner assembly.
    c. Lubricate burner motor.
    d. Install new oil nozzle.
    e. Install new oil filter.
    f. Inspect fire-matic valves for proper operation.
    g. Inspect oil storage tank and vent for proper condition.
    h. Test run unit and check all pressures for proper operations.
    i. Combustion efficiency, smoke, and CO2 test unit.
    j. Ensure all boiler passages are brushed, cleaned, and vacuumed.

G. **Boiler Inspections and Start Up Service- PM**

1. Annual Preventive Maintenance – One (1) time per year
    a. Inspect combustion chamber and clean.
    b. Inspect and clean all combustion exhaust vent piping to the point it enters the chimney.
    c. Test all safety circuits for proper operations and functions.
    d. Check gas valve for proper operation and pressure.
    e. Inspect and clean pilot and burner, adjust as required.
    f. Inspect expansion tank and circulators for proper operations.
    g. Clean and inspect barometric damper and flue piping.
    h. Check and test all thermostats for proper calibration and operations.
    i. Ensure all boiler passages are brushed, cleaned, and vacuumed.
    j. Check and inspect circulating pumps, zone valves, and controls for proper operation.
2. Additional service required during annual PM for oil-fired boiler:
    a. Clean and adjust electrodes.

b. Clean and inspect burner assembly.
c. Lubricate burner motor.
d. Install new oil nozzle.
e. Install new oil filter.
f. Inspect fire-matic valves for proper operation.
g. Inspect oil storage tank and vent for proper condition.
h. Test run unit and check all pressures for proper operations.
i. Combustion efficiency, smoke, and CO2 test unit.
j. Ensure all boiler passages are brushed, cleaned, and vacuumed.

H. **Hot Water Heater Inspections and PM**

1. Annual Preventive Maintenance – One (1) time per year
   a. Oil - Hot Water Heaters:
      i. Replace oil nozzle, oil filter, and pump strainer.
      ii. Remove vent pipe, clean flue, and vent passages to the point it enters the chimney.
      iii. Remove burner and vacuum out combustion chamber.
      iv. Clean and dust electrodes; reset as needed.
      v. Adjust burners to proper efficiency.
      vi. Test all safeties and limits.
      vii. Cycle burner to test unit.
      viii. Manually flush hot water tanks (through boiler drain).
      ix. Check hot water safety solenoid and aquastat.
      x. Check and inspect recirculation pumps and mixing valves for proper operation.
   b. Gas - Hot Water Heaters:
      i. Remove gas burner and vacuum out chamber and clean pilot.
      ii. Remove and clean vent pipe and inspect passage to the point it enters the chimney.
      iii. Change thermo-couple, if applicable.
      iv. Check all safeties.
      v. Test run unit.
      vi. Manually flush hot water tanks (through boiler drain).
      vii. Check hot water safety solenoid and aquastat.
      viii. Check and inspect recirculation pumps and mixing valves for proper operation.
   c. Electric – Hot Water Heaters:
      i. Inspect and clean heating element if necessary.
      ii. Test the thermostats.
      iii. Check all safeties.
      iv. Test run unit.
      v. Manually flush hot water tanks (through boiler drain).
      vi. Check hot water safety solenoid and aquastat.
      vii. Check and inspect recirculation pumps and mixing valves for proper operation.

V. **REPORTS:**

A. Generate and submit an Inspection, Start Up and/or Maintenance Service Report noting that the inspection and maintenance were completed for each unit of all systems. The report must indicate the system's manufacturer, and the model and/or serial number of the unit(s) serviced and record combustion efficiency test results. Any defects found must be indicated along with a quotation for repairs.

B. Leave a copy of the report at the site and provide a copy to the Work Control Center **WITHIN 48 HOURS** via fax to **(518) 359-4172** or via email to Chase.V.Kavanagh@opwdd.ny.gov

## VI. ACCOUNTING:

A. **Job Tickets:** Job Tickets are to be presented to the House Manager or designee upon completion of service. It is advised that the Job Ticket be a three-part form. House Manager or designee will sign Job Tickets to verify Contractor's time spent on site. One copy of the Job ticket is to remain at the Site serviced. One copy of the signed Job Ticket is to accompany the invoice for services. The signed ticket acts as verification of time on site, a requirement for payment. One copy is for your files. The following information is to be recorded on each Job Ticket:

1. The Name of the Site
2. The type of service completed
3. The date of service
4. Arrival time and departure time
5. The Signature of House Manager or designee.

B. **Prevailing Wage:** Inspections, start-up, and winterization services are not covered by Article 8 of the New York State Labor Law. Prevailing Wage will apply to all repairs, replacements, and modifications provided under the contract.

The PRC number for this Contract is PRC# **2026001767**. A copy of the Contractor's certified payroll is required to be submitted with invoices, where prevailing wages are applicable, before payment for services is rendered.

Contractor and its subcontractors must be registered with the New York State Department of Labor (NYSDOL) and submit their Certificate of Contractor Registration at the time of the bid submission for any Article 8 project.

C. **Invoices:** Invoices must indicate Invoice number, PO# OPD01- , Contract number, the name of the site, the date of service and the type of service rendered. An invoice may be submitted for a single site or multiple sites if each site is itemized on the invoice. All invoices must have a signed Job Ticket attached. Invoices are to be submitted for payment within thirty (30) days of service to:

OPWDD Sunmount DDSOO
Unit ID: 3660240
C/O NYS OGS BSC Accounts Payable
Building 5, Fifth Floor
1220 Washington Ave.,
Albany, NY 12226-1900

The State of New York may require the Contractor to submit billing invoices electronically. Information regarding eInvoicing may be found at: https://bsc.ogs.ny.gov/nys-vendors

D. **Payment:** Payments will be made based on actual services rendered.

Payment for invoices submitted by the Contractor shall only be rendered electronically unless payment by paper check is expressly authorized by the head of the State Agency, in the sole discretion of the head of such State Agency, due to extenuating circumstances. Such electronic payment shall be made in accordance with OSC's procedures and practices to authorize electronic payments.

# Exhibit A
# Site and Equipment List

Fuel Key: O = Oil, G = Gas, E = Electric, P=Propane

| Cluster 1 - Clinton and Essex Counties | | | | | | | |
|---|---|---|---|---|---|---|---|
| **SITE/ CONTACT INFO** | **FURNACE BRAND** | **HEATING TYPE** | **FUEL** | **HOT WATER HEATER BRAND** | **FUEL** | **A/C MFG/INSTALL** | **A/C TYPE** |
| Adams Lane SOIRA<br>22 Adams Lane<br>Newcomb, NY 12852<br>518-582-4243 | Utica | Boiler | O | Bradford White | E | Carrier | 1 Split System |
| 25 School St. SOIRA<br>25 School St.<br>Keeseville, NY 12944<br>518-834-4630 | Burnham PU87WO | Boiler | O | Bock 71-E<br>AO Smith TJV 120M<br>AO Smith JW6F507400 | O | York H1D8024506A<br>York H1D8024506A<br>Tempstar N2A330AKC200 | 3 Split Systems |
| 31 School St. SOIRA<br>31 School St.<br>Keeseville, NY 12944<br>518-834-4686 | HB Smith | Boiler | O | Bock 71E<br>Bock 51E | O | Trane XB-1000<br>Trane XB-1000 | 2 Split Systems |
| Rose SOIRA<br>55 Rose Ave.<br>Rouses Point, NY 12979<br>518-297-2357 | N/A | Baseboard | E | AO Smith<br>Reliance | E | York H1D8024506A<br>York H1D8024506A | 2 Split Systems |

Fuel Key: O = Oil, G = Gas, E = Electric, P=Propane

## Cluster 2 - Franklin County

| SITE/CONTACT INFO | FURNACE BRAND | HEATING TYPE | FUEL | HOT WATER HEATER BRAND | FUEL | A/C MFG/INSTALL | A/C TYPE |
|---|---|---|---|---|---|---|---|
| St. Bernard SOIRA<br>12 St. Bernard St.<br>Saranac Lake, NY 12986<br>518-891-5397 | Weil McLain R-768-WT<br>Weil McLain P-WGO-5 | Boiler<br>Boiler | O | Weil McLain Gold plus 60<br>(side mate) | O | N/A | N/A |
| Wawbeek SOIRA<br>26 Wawbeek Ave.<br>Tupper Lake, NY 12986<br>518-359-8534 | Boderus Logano G215-8 | Boiler | O | Bock | O | N/A | N/A |
| 380 Hosley ICF<br>380 Hosley Ave.<br>Tupper Lake, NY 12986<br>518-359-9703 | Lochnivar | Boiler | P | Bradford White<br>Bradford White | P | Nortek Airtemp | 3 Split Systems |
| 390 Hosley ICF<br>390 Hosley Ave.<br>Tupper Lake, NY 12986<br>518-359-9701 | Lochnivar | Boiler | P | Bradford White CF-50-6<br>Bradford White MD-71E | P | Nortek Airtemp | 3 Split Systems |
| 78 Edgewood SOIRA<br>78 Edgewood Rd.<br>Saranac Lake, NY 12986<br>518-891-5391 | N/A | Baseboard | E | Bradford White<br>AO Smith | E | LG LMU240CE<br>LG LMU240CE<br>Nortek GXH24 | 3 Split Systems |
| 80 Edgewood SOIRA<br>80 Edgewood Lake<br>Saranac, NY 12986<br>518-891-5476 | N/A | Baseboard | E | Bradford White<br>Bradford White | E | LG LU2240CE<br>LG LU2240CE<br>Comfort Star | 3 Split Systems |
| Moody SOIRA<br>1996 St. Rt. 30<br>Tupper Lake, NY 12986<br>518-359-7489 | N/A | Baseboard | E | Richmond<br>Richmond<br>Richmond | E | N/A | N/A |
| Underwood SOIRA<br>48 Underwood Rd.<br>Tupper Lake, NY 12986<br>518-359-3766 | Boderus Logano G215 | Boiler | O | Side Mate | O | N/A | N/A |
| Bellevue SOIRA<br>56 Bellevue Terrace<br>Tupper Lake, NY 12986<br>518-359-8677 | N/A | Baseboard | E | Richmond<br>Richmond | E | Goodman | 1 Split System |
| 57 Haymeadow SOIRA<br>57 Haymeadow Rd.<br>Tupper Lake, NY 12986<br>518-359-2010 | N/A | Baseboard | E | Bradford White<br>AO Smith | E | Nortek<br>Carrier 38BNB30311 | 2 Split Systems |
| 61 Haymeadow SOIRA<br>61 Haymeadow Rd.<br>Tupper Lake, NY 12986<br>518-359-2937 | N/A | Baseboard | E | Bradford White<br>AO Smith | E | EMI MC4D9908AA0F00F<br>Nortek VS4BD-048KB | 2 Split Systems |
| Little Wolf SOIRA<br>19 Little Wolf Rd.<br>Tupper Lake, NY 12986<br>518-359-2557 | N/A | Baseboard | E | Bradford White<br>Bradford White<br>Richmond | E | Nortek GXH18 | 1 Split System |

Fuel Key: O = Oil, G = Gas, E = Electric, P=Propane

## Cluster 3 - Hamilton County

| SITE/ CONTACT INFO | FURNACE BRAND | HEATING TYPE | FUEL | HOT WATER HEATER BRAND | FUEL | A/C MFG/INSTALL | A/C TYPE |
|---|---|---|---|---|---|---|---|
| Algonquin SOIRA<br>272 Algonquin Rd.<br>Wells, NY 12190<br>518-924-2009 | Weil Mclain Evergreen Pro 220 | Boiler | P | Rheem RTGH<br>Rheem RTGH | P | Goodman HDC24-1AB | 3 Split Systems |
| Pelon SOIRA<br>118 Pelon Rd.<br>Indian Lake, NY 12842<br>518-648-5930 | Advantage A0-5-175 | Boiler | O | Reliance 606 | E | Carrier | 2 Split Systems |
| Sabeal SOIRA<br>6204 NYS Rt. 30<br>Indian Lake, NY 12842<br>518-648-5930 | Utica UAF11062 | Boiler | O | AO Smith TJ-805000 | E | Carrier | 2 Split Systems |
| Wilber SOIRA<br>114 Wilber Lane<br>Speculator, NY 12164<br>518-548-3788 | Advantage A0-5-175 | Boiler | O | John Wood JW6F507400<br>John Wood JW6F507400<br>Bradford White MD-CF-32-5 | O | Goodman HDC24-1AB | 3 Split Systems |
| Mix Road SOIRA<br>25 Mix Rd.<br>Long Lake, NY 12847<br>518-624-4216 | Airco<br>Bard | Furnace<br>Furnace | O | Bradford White CF-50-06<br>Bock 1-2019<br>John Wood MD-JW717/727 | O | N/A | N/A |
| Walker Road SOIRA<br>271 Kickerville Rd.<br>Long Lake, NY 12747<br>518-624-5335 | Olsen<br>Bard | Furnace<br>Furnace | O | Bradford White CF-50-06<br>Bradford White CF-7-3 | O | N/A | N/A |
| Long Lake Day Hab<br>16 Stone Rd.<br>Long Lake, NY 12847<br>518-624-4140 | Oneida HO-125A-4BC<br>Oneida HO-125A-4BC<br>Comfort Air Patriot 80<br>Comfort Air Patriot 80<br>Comfort Air Patriot 80 | Furnace<br>Furnace<br>Furnace<br>Furnace<br>Furnace | O | Bradford White CF-50-06<br>Bradford White CF-7-3 | O | N/A | N/A |

Fuel Key: O = Oil, G = Gas, E = Electric, P=Propane

## Cluster 4 - St. Lawrence County

| SITE/ CONTACT INFO | FURNACE BRAND | HEATING TYPE | FUEL | HOT WATER HEATER BRAND | FUEL | A/C MFG/INSTALL | A/C TYPE |
|---|---|---|---|---|---|---|---|
| Leroy SOIRA<br>134 Leroy St.<br>Potsdam, NY 13767<br>315-265-7807 | Burnham | Boiler | G | Rinnai | G | N/A | N/A |
| Sports SOIRA<br>3 Sports Ave.<br>Norwood, NY 13668<br>315-353-2095 | Trane<br>Carrier | Furnace<br>Furnace | G | Bradford White<br>AO Smith | G | Carrier | 2 Split Systems |
| Grant SOIRA<br>4 Grant St.<br>Potsdam, NY 13676<br>315-265-2665 | Weil McLain | Boiler | G | Bradford White | G | Lennox | 1 Split Systems |
| 225 Bayley SOIRA<br>225 Bayley Rd.<br>Massena, NY 13662<br>315-769-6399 | Trane<br>HB Smith | Furnace<br>Boiler | G | Bradford White<br>AO Smith | G | Trane | 2 Split Systems |
| 227 Bayley SOIRA<br>227 Bayley Rd.<br>Massena, NY 13662<br>315-769-6172 | Trane<br>HB Smith | Furnace<br>Boiler | G | Bradford White<br>AO Smith | G | Trane | 2 Split Systems |
| Spruce SOIRA<br>2 Spruce St.<br>Norwood, NY 13668<br>315-353-2691 | Carrier<br>Carrier | Furnace<br>Furnace | G | AO Smith<br>Bradford White | G | Carrier<br>Trane | 2 Split Systems |
| Sealy SOIRA<br>4 Sealy Dr.<br>Potsdam, NY 13676<br>315-265-1349 | Weil McLain | Boiler | G | Super Stor Side Mate | G | N/A | N/A |
| Colgate SOIRA<br>30 Colgate Dr.<br>Massena, NY 13662<br>315-764-7801 | Armstrong Air | Furnace | G | Bradford White | G | N/A | N/A |
| Depot SOIRA<br>9 Depot St.<br>Madrid, NY 13660<br>315-322-4108 | Weil McLain | Boiler | G | Rheem<br>Rheem | G | Carrier | 2 Split Systems |
| Elm SOIRA<br>62 County Rt. 31<br>Madrid, NY 13660<br>315-322-4107 | Weil McLain | Boiler | G | Rheem<br>Rheem | G | York | 2 Split Systems |
| Maple SOIRA<br>15 Maple St.<br>Norwood, NY 13668<br>315-353-2023 | Carrier<br>Carrier | Furnace<br>Furnace | G | Bradford White<br>Bradford White<br>AO Smith | G | Carrier | 2 Split Systems |
| Cranberry Lake SOIRA<br>7266 Rt. 3<br>Cranberry Lake, NY 12927<br>315-848-3421 | Liberty Slant Fin | Boiler | O | Weil McLain Side Mate | O | N/A | N/A |
| Star Lake SOIRA<br>6 School St.<br>Star Lake, NY 13690<br>315-848-3402 | Liberty Slant | Boiler | O | HTP Side Mate | O | N/A | N/A |

# Cost Proposal Form

- Complete the table for each cluster you wish to bid on. All sites within a cluster must be included in your bid. Not all services are needed at every site.
- Please note estimated labor hours and parts costs. These are estimates only. Payment will be made on actual services rendered.
- Please double check all your math. Refer to page 17, #17-Evaluation Criteria: Method of Award for more information.
- Please see the example of a completed Cluster table below. Include the completed Cluster table for each cluster on which you are bidding (pages 33-36) and the Summary/Signature Page (page 37) with your bid.

| **EXAMPLE CLUSTER** | | | | |
|---|---|---|---|---|
| **Annual Inspection, Start-up, and Preventative Maintenance Cost** | | | | |
| **Site** | **Heat** | **Hot Water** | **A/C** | **Site Total** |
| EXAMPLE HOUSE #1 | $10.00 | $10.00 | $10.00 | $30.00 |
| EXAMPLE HOUSE #2 | $10.00 | $10.00 | N/A | $20.00 |
| | | | **Total Annual Inspection, Start Up, and PM Cost EXAMPLE CLUSTER (A) =** | **$50.00** |
| | | | | |
| **EXAMPLE Labor Rates per Hour** | | | | |
| Monday-Friday 8:00am – 5:00pm | $10.00 | X Estimated 4 Hours = | | $40.00 |
| Monday-Friday 5:01pm-7:29am & Sat/Sun 12:00am-11:59pm | $10.00 | X Estimated 2 Hours = | | $20.00 |
| Holiday | $10.00 | X Estimated 2 Hours = | | $20.00 |
| | | | **Total Annual Estimated Labor Cost EXAMPLE CLUSTER (B) =** | **$80.00** |
| | | | | |
| **EXAMPLE Parts with Mark Up** **Parts Mark Up not to exceed 20%* | | | | |
| Parts Mark Up | 10% | X $100.00 = (Estimated Annual Parts) | | $10.00 |
| | | Estimated Annual Parts = | | $100.00 |
| | | | **Total Annual Estimated Parts with Mark Up Cost EXAMPLE CLUSTER (C) =** | **$110.00** |
| | | | | |
| | | | **Total Annual Estimated Combined Cost EXAMPLE CLUSTER (A+B+C) =** | **$240.00** |

(A) Total Annual Inspection, Start-up, and Preventative Maintenance (PM) costs are calculated by totaling the sums of all annual inspections, start-up, and PM costs in the cluster.
(B) Total Annual Estimated Labor costs are calculated by multiplying labor rates by estimated hours for each category, then totaling estimated labor costs.
(C) Total Annual Estimated Parts with Mark-up costs are calculated by multiplying parts mark-up percentage by estimated parts cost, then totaling parts mark-up cost and estimated parts cost.

Total Annual Estimated Combined Cost for each cluster will be calculated by adding the sum of (A) Total Annual Inspections, Start-up, and PM cost, (B) Total Annual Estimated Labor cost, and (C) Total Annual Estimated Parts with Markup cost.
Transfer the Total Annual Estimated HVAC Cost per Cluster for each cluster on which you are bidding onto the Summary/Signature Page (page 37)

| **Cluster 1 - Clinton and Essex Counties** | | | | |
|---|---|---|---|---|
| **Annual Inspection, Start-up, and Preventative Maintenance Cost** | | | | |
| **Site** | **Heat** | **Hot Water** | **A/C** | **Site Total** |
| Adams Lane SOIRA | $ | + $ | + $ | **=$** |
| 25 School St. SOIRA | $ | + $ | + $ | **=$** |
| 31 School St. SOIRA | $ | + $ | + $ | **=$** |
| Rose SOIRA | $ | + $ | + $ | **=$** |
| | | | **Total Annual Inspection, Start Up, and PM Cost Cluster 1 - Clinton and Essex Counties (A) =** | $ |
| | | | | |
| **Labor Rates per Hour** | | | | |
| Monday-Friday 8:00am – 5:00pm | $ | | X Estimated 50 Hours = | $ |
| Monday-Friday 5:01pm-7:29am & Sat/Sun 12:00am-11:59pm | $ | | X Estimated 2 Hours = | +$ |
| Holiday | $ | | X Estimated 2 Hours = | +$ |
| | | | **Total Annual Estimated Labor Cost Cluster 1 - Clinton and Essex Counties (B) =** | $ |
| | | | | |
| **Parts with Mark Up** **Parts Mark Up not to exceed 20%* | | | | |
| Parts Mark Up | % | | X $1,700.00 = (Estimated Annual Parts) | $ |
| | | | Estimated Annual Parts = | +$1,700.00 |
| | | | **Total Annual Estimated Parts with Mark Up Cost Cluster 1 - Clinton and Essex Counties (C) =** | $ |
| | | | | |
| | | | **Total Annual Estimated Combined Cost Cluster 1 - Clinton and Essex Counties (A+B+C) =** | $ |

## Cluster 2 - Franklin County

### Annual Inspection, Start-up, and Preventative Maintenance Cost

| Site | Heat | Hot Water | A/C | Site Total |
|---|---|---|---|---|
| St. Bernard SOIRA | $ | + $ | + $ | =$ |
| Wawbeek SOIRA | $ | + $ | + $ | =$ |
| 380 Hosley ICF | $ | + $ | + $ | =$ |
| 390 Hosley ICF | $ | + $ | + $ | =$ |
| 78 Edgewood SOIRA | $ | + $ | + $ | =$ |
| 80 Edgewood SOIRA | $ | + $ | + $ | =$ |
| Moody SOIRA | $ | + $ | + $ | =$ |
| Underwood SOIRA | $ | + $ | + $ | =$ |
| Bellevue SOIRA | $ | + $ | + $ | =$ |
| 57 Haymeadow SOIRA | $ | + $ | + $ | =$ |
| 61 Haymeadow SOIRA | $ | + $ | + $ | =$ |
| Little Wolf SOIRA | $ | + $ | + $ | =$ |
| | | | **Total Annual Inspection, Start Up, and PM Cost Cluster 2 - Franklin County (A) =** | $ |

### Labor Rates per Hour

| | | | |
|---|---|---|---|
| Monday-Friday 8:00am – 5:00pm | $ | X Estimated 134 Hours = | $ |
| Monday-Friday 5:01pm-7:29am & Sat/Sun 12:00am-11:59pm | $ | X Estimated 5 Hours = | $ |
| Holiday | $ | X Estimated 2 Hours = | $ |
| | | **Total Annual Estimated Labor Cost Cluster 2 - Franklin County (B) =** | $ |

### Parts with Mark Up **Parts Mark Up not to exceed 20%*

| | | | |
|---|---|---|---|
| Parts Mark Up | % | X $4,700.00 = (Estimated Annual Parts) | $ |
| | | Estimated Annual Parts = | +$4,700.00 |
| | | **Total Annual Estimated Parts with Mark Up Cost Cluster 2 - Franklin County (C) =** | $ |

| | |
|---|---|
| **Total Annual Estimated Combined Cost Cluster 2 - Franklin County (A+B+C) =** | $ |

## Cluster 3 - Hamilton County

| Annual Inspection, Start-up, and Preventative Maintenance Cost | | | | |
|---|---|---|---|---|
| **Site** | **Heat** | **Hot Water** | **A/C** | **Site Total** |
| Algonquin SOIRA | $ | + $ | + $ | **=$** |
| Pelon SOIRA | $ | + $ | + $ | **=$** |
| Sabeal SOIRA | $ | + $ | + $ | **=$** |
| Wilber SOIRA | $ | + $ | + $ | **=$** |
| Mix Road SOIRA | $ | + $ | + $ | **=$** |
| Walker Road SOIRA | $ | + $ | + $ | **=$** |
| Long Lake Day Hab | $ | + $ | + $ | **=$** |
| | | | **Total Annual Inspection, Start Up, and PM Cost Cluster 3 - Hamilton County (A) =** | $ |

| Labor Rates per Hour | | | |
|---|---|---|---|
| Monday-Friday 8:00am – 5:00pm | $ | X Estimated 85 Hours = | $ |
| Monday-Friday 5:01pm-7:29am & Sat/Sun 12:00am-11:59pm | $ | X Estimated 3 Hours = | $ |
| Holiday | $ | X Estimated 2 Hours = | $ |
| | | **Total Annual Estimated Labor Cost Cluster 3 - Hamilton County (B) =** | $ |

| **Parts with Mark Up** **Parts Mark Up not to exceed 20%* | | | |
|---|---|---|---|
| Parts Mark Up | % | X $3,000.00 = (Estimated Annual Parts) | $ |
| | | Estimated Annual Parts = | +$3,000.00 |
| | | **Total Annual Estimated Parts with Mark Up Cost Cluster 3 - Hamilton County (C) =** | $ |

| | |
|---|---|
| **Total Annual Estimated Combined Cost Cluster 3 - Hamilton County (A+B+C) =** | $ |

## Cluster 4 - St. Lawrence County

### Annual Inspection, Start-up, and Preventative Maintenance Cost

| Site | Heat | Hot Water | A/C | Site Total |
|---|---|---|---|---|
| Leroy SOIRA | $ | + $ | + $ | =$ |
| Sports SOIRA | $ | + $ | + $ | =$ |
| Grant SOIRA | $ | + $ | + $ | =$ |
| 225 Bayley SOIRA | $ | + $ | + $ | =$ |
| 227 Bayley SOIRA | $ | + $ | + $ | =$ |
| Spruce SOIRA | $ | + $ | + $ | =$ |
| Sealy SOIRA | $ | + $ | + $ | =$ |
| Colgate SOIRA | $ | + $ | + $ | =$ |
| Depot SOIRA | $ | + $ | + $ | =$ |
| Elm SOIRA | $ | + $ | + $ | =$ |
| Maple SOIRA | $ | + $ | + $ | =$ |
| Cranberry Lake SOIRA | $ | + $ | + $ | =$ |
| Star Lake SOIRA | $ | + $ | + $ | =$ |
| | | | **Total Annual Inspection, Start Up, and PM Cost Cluster 4 - St. Lawrence County (A) =** | $ |

### Labor Rates per Hour

| | | | |
|---|---|---|---|
| Monday-Friday 8:00am – 5:00pm | $ | X Estimated 158 Hours = | $ |
| Monday-Friday 5:01pm-7:29am & Sat/Sun 12:00am-11:59pm | $ | X Estimated 6 Hours = | $ |
| Holiday | $ | X Estimated 2 Hours = | $ |
| | | **Total Annual Estimated Labor Cost Cluster 4 - St. Lawrence County (B) =** | $ |

### Parts with Mark Up **Parts Mark Up not to exceed 20%*

| | | | |
|---|---|---|---|
| Parts Mark Up | % | X $5,500.00 = (Estimated Annual Parts) | $ |
| | | Estimated Annual Parts = | +$5,500.00 |
| | | **Total Annual Estimated Parts with Mark Up Cost Cluster 4 - St. Lawrence County (C) =** | $ |

| | |
|---|---|
| **Total Annual Estimated Combined Cost Cluster 4 - St. Lawrence County (A+B+C) =** | $ |

# Summary/Signature Page

| Cluster | Total Annual Estimated Combined Cost |
|---|---|
| **Cluster 1 - Clinton and Essex Counties** | **$** |
| **Cluster 2 - Franklin County** | **$** |
| **Cluster 3 - Hamilton County** | **$** |
| **Cluster 4 - St. Lawrence County** | **$** |

**Effective December 30, 2024, in order to be qualified to work on public works projects covered by Article 8 of the Labor Law, all Contractors (including Subcontractors) must be registered with the New York State Department of Labor (NYSDOL) in accordance with Labor Law § 220-i. Contractors must be registered before submitting a bid. In addition, Contractors must be registered prior to commencing any new work. Contractors must submit their Certificate of Registration at the time the bid is made.**

**Please check the box below and place your initials confirming that you have included the NYSDOL Certificate of Registration.**

☐ _____ **I certify that I have included a copy of my company's Certificate of Registration.**

_____ _____
Bidder Signature Print Name & Title

This bid is valid for _____ days (Bids shall be valid for not less than 180 days)

Name of Company:

Address:

Federal ID Number: Telephone:

Date: Email:

# No-Bid Form

Bidders choosing not to bid are requested to complete and return only this form.

☐ We do not provide the requested services. Please remove our firm from your mailing list.

☐ We are unable to bid at this time because:

_____

_____

_____

_____

_____

_____

_____

☐ Please retain our firm on your mailing list.

_____
(Firm Name)

_____ _____
(Signature) (Date)

_____ _____
(Print Name) (Title)

_____ _____
(E-mail) (Telephone)

Failure to respond to bid invitations may result in your firm being removed from our mailing lists.