

# **Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles**

## **Statement of Work**

### **GENERAL PROVISIONS**

General Requirements  
Contract Validity Period  
Option to Extend  
Subcontracting  
Estimated Quantities  
Experience Requirements  
Work Notification  
Permits  
Character of Workers and Equipment  
Safety  
Inspection  
Contractor's Representative  
Holidays  
Mobilization  
Travel Time  
Work Schedule  
Pre-Service Meeting  
Materials  
Lift Equipment  
Invoice and Billing Instructions  
Strategic Environmental Management Program (SEMP)  
Liquidated Damages

### **HVAC MAINTENANCE AND REPAIR SERVICE SPECIFICATIONS**

Item 1 – HVAC Journeyman - Regular Hours  
Item 2 – HVAC Journeyman - Premium Hours  
Item 3 – Inspection of HVAC Systems at County Office and all County Stockpiles (Fall)  
Item 4 – Inspection of HVAC Systems at County Office and all Stockpiles (Spring)  
Item 5 – Journeyman Plumber - Regular Hours  
Item 6 – Journeyman Plumber - Premium Hours

### **ATTACHMENTS**

Attachment A, HVAC Work Request  
Attachment B, Contractor's Representative  
Attachment C, Confirmation of Service Form, OS-501  
Attachment D, Office and Stockpile Name, Address of Stockpiles, Type, and Description of HVAC Equipment

# **Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles**

## **Statement of Work**

### GENERAL REQUIREMENTS

This work consists of responding to all calls from the Department to service, maintain, troubleshoot and repair all Heating, Ventilation, and Air Conditioning (HVAC) Systems, and related equipment, at all of the facilities listed in Attachments D.

These facilities are owned by the Pennsylvania Department of General Services and are occupied by the Pennsylvania Department of Transportation.

The intent of this service to preserve the original design, operational characteristics and performance of these HVAC Systems; all equipment in these HVAC systems will be maintained by the Contractor in accordance with the manufacturer's specifications. Contractor will perform all work in accordance with the manufacturer's recommendations.

Facilities, HVAC Systems, or related equipment may be added to, or subtracted from, the maintenance schedule, and Attachment D, if the needs of the Pennsylvania Department of Transportation change, or, if the Contractor makes a recommendation which will improve our maintenance program. The Contractor must present any proposed changes to the maintenance program to the Department's Project Manager, and the Department reserves the right, at its sole discretion, to reject or accept any Contractor proposed changes to the maintenance program.

Contractor shall furnish all labor, materials, tools, equipment, instruments, test equipment, technical and engineering support required for maintenance and repair of Department HVAC Systems.

Contractor will comply with all State and Local laws, regulations, and codes.

A list of locations, HVAC system manufacturer name (if known), type of unit (heating, air conditioning, or both), model number (if known), and the number of units is contained in Attachment D. The HVAC System information contained on Attachment D is for reference only; it is the Contractor's responsibility to familiarize themselves with the HVAC Systems at each location to insure the Contractor has a thorough understanding of the HVAC Systems to be maintained and repaired under this contract.

A list of addresses for each location is contained in Attachment E.

This work does not include repair of window unit air conditioners or portable heating and air conditioning units.

The Project Manager of this contract will be the County Equipment Manager or his/her designee.

### CONTRACT VALIDITY PERIOD

This service is for a one (1) year period. Refer to the Terms and Conditions for renewal options.

# **Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles**

## **Statement of Work**

### OPTION TO EXTEND

Refer to the Terms and Conditions for extension options.

### SUBCONTRACTING

Refer to the Terms and Conditions for subcontracting terms.

### ESTIMATED QUANTITIES

All quantities are estimated and the Department reserves the right to increase or decrease these quantities based upon need.

### EXPERIENCE REQUIREMENTS

Contractors bidding on this contract must have a minimum of three (3) years of experience in HVAC System maintenance and repair work, and must have been in business a minimum of one (1) year. Contractor shall provide the Purchasing Agent with written documentation detailing its HVAC System maintenance and repair work experience, and business history, within three days of notice of apparent low bidder status.

Contractor employees performing work under this contract must have a minimum of three (3) years of experience in HVAC maintenance and repair work. Contractor shall submit to the Project Manager names of the personnel who will be performing work under this contract, along with their required HVAC System maintenance and repair work experience, during the Pre-Service Meeting.

Journeyman Plumbers performing work under this contract must have a minimum of three (3) years of experience in HVAC System Plumbing maintenance and repair work. Contractor shall submit to the Project Manager names of the personnel who will be performing work under this contract, along with their required HVAC System Plumbing maintenance and repair work experience, during the Pre-Service Meeting. Contractor will certify each employee listed has satisfied the background check requirements described in the Terms and Conditions.

### WORK NOTIFICATION

Notification of the Department's need for service will be provided to the Contractor using Attachment A which will be e-mail or faxed to the Contractor or their authorized representative. Contractor is required to report to worksite prepared to work within one (1) business day of Department notification. The Department guarantees a minimum of one (1) hour of work for each notification.

# **Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles**

## **Statement of Work**

### PERMITS

It will be the Contractor's responsibility to acquire any permits for work that requires such permitting.

### CHARACTER OF WORKERS AND EQUIPMENT

Contractor shall employ at all times sufficient labor and equipment for performing the work. Contractor shall employ only competent and efficient HVAC Journeyman for every kind of work that is describe in this specification.

Prior to start of work, the Contractor must provide the Purchasing Agent with documentation that satisfies the background check requirements defined in the Terms and Conditions.

Whenever, in the Departments Representative's opinion, any person is unfit to perform the task, does the work contrary to instructions, or exhibits improper conduct, the Contractor shall immediately remove the person from Department property, and will not employ the person again for work under this contract without the express written permission of the Project Manager.

Contractor shall furnish the type, condition, and quantity of equipment necessary for the proper execution of the required work. Contractor shall properly maintain all equipment and tools needed to complete all HVAC System maintenance and repair work at all of the specified locations. All tools and equipment utilized by the Contractor for work under this contract are subject to the Department's acceptance before and during use in connection with the project.

### SAFETY

All necessary safety precautions are the responsibility of the contractor.

All work will be performed in a professional, safe and orderly manner, and in accordance with state and local laws.

The Contractor shall be well-informed of, and comply with, all Department of Environmental Protection (DEP) safety regulations, especially those which apply to entering confined areas.

The Contractor shall be well-informed of, and comply with, all Occupational Safety and Health Administration (OSHA) regulations.

All traffic control, if needed, will be supplied by the Department. The Contractor Representative will notify the Project Manager 24 hours in advance of any anticipated need when Department traffic control support is required.

### INSPECTION

# **Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles**

## **Statement of Work**

All work will be subject to inspection by the Project Manager during the term of this contract. Failure to satisfactorily meet all the requirements of this contract, or the refusal to promptly correct all deficiencies within 24 hours of notification by phone, fax or written (including email), may be cause to assess liquidated damages and /or termination of the contract.

### **CONTRACTOR'S REPRESENTATIVE**

The Contractor shall assign one of its employees to serve as the Contract Representative. The Contractor's Contract Representative will be the Contractor's sole contact person designated to interact and communicate with the Department on all contract-related activities and issues. The assigned Contractor Representative must be proficient in the English language.

The Contractor shall provide the Department with it's Contract Representative's contact information including name, title, cell phone number, and email address.

The Contractor's Contract Representative shall have the authority to make all contract-related decisions. The Contractor shall notify the Department immediately, in writing, of any change involving the individual serving in this position.

The Contractor must complete and submit the attached Contractor Representative Information Form (Attachment B) to the Purchasing Agent within 3 business days of notice of apparent low bidder status.

### **HOLIDAYS**

No work will be performed on National Holidays without the written approval of the Project Manage. The following is the list of National Holidays:

1. New Year's Day
2. Dr. Martin Luther King Jr. Day
3. President's Day
4. Memorial Day
5. Independence Day
6. Labor Day
7. Columbus Day
8. Veteran's Day
9. Thanksgiving Day
10. Day after Thanksgiving Day
11. Christmas Day

Monday is recognized as a holiday for all holidays occurring on a Sunday, and Friday is recognized for all holidays occurring on a Saturday.

# **Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles**

## **Statement of Work**

### MOBILIZATION

Mobilization and items such as required licenses, insurance, and communication devices as directed by the Department for the duration of this agreement will be considered incidental to the items of work and no additional payment will be made.

### TRAVEL TIME

Travel time to the job site, and between job sites, is considered incidental to the cost of the work; no payments will be made for travel time.

### WORK SCHEDULE

All planned preventive and service maintenance shall be performed during regular work hours between 6:00 a.m. to 4:30 pm. Monday thru Friday.

The following is the planned maintenance schedule for County Offices and stockpiles:

1. County Offices – September or October and March or April
2. Winter Stockpiles – March or April
3. Winter and Summer Stockpiles - September or October and March or April

### PRE-SERVICE MEETING

After the fully executed Purchase Order is issued, the Project Manager will contact the Contractor to notify the Contractor of the time and location of the Pre-Service Meeting. The Contractor's Representative is required to attend this meeting.

### MATERIALS

Contractor will provide all materials needed to properly maintain, and make required repairs to, Department HVAC Systems under this contract.

Contractor will utilize materials that equal or exceed the recommendations of the HVAC system manufacturer. All materials utilized must be new and originally manufactured by the HVAC Systems manufacturer, or newly manufactured substitutes which have been approved by the HVAC System manufacturer. Refer to the Terms and Conditions for additional information regarding New Equipment.

Contractor will not initiate a material purchase without prior written approval of the Project Manager.

All materials must be inspected and approved by the Project Manager prior to beginning any work.

# **Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles**

## **Statement of Work**

Contractor will leave all replaced materials with the Project Manager when as each job completed.

Materials are a pay item under this contract. A predetermined amount of money for materials is indicated in the Invitation for Bid (IFB) Header Text. All materials needed to properly maintain, and make required repairs to, Department HVAC Systems under this contract will be paid for under a specific Materials Allowance line on the fully executed purchase order issued under this contract.

The Contractor's cost of material used will be reimbursable at the actual cost, including applicable tax, shown on vendor's (supplier's) invoices.

The Contractor must satisfy the requirements of the above "Invoice and Billing Instructions" section in order to receive payment for materials under this contract. Contractor must attach the vendor's (supplier's) invoice to the corresponding Confirmation of Services Form (OS-501). Contractor will submit separate documentation for each site and each occurrence.

In the event that any material(s) furnished by the Contractor is found to be deficient or otherwise unacceptable, the material(s) will be removed by the Contractor and replaced with acceptable material(s) and installed anew, to the satisfaction and approval of the Project Manager, and the Contractor will bear all related costs and expenses.

### **LIFT EQUIPMENT**

Contractor will provide all equipment needed to properly maintain, and make required repairs to, Department HVAC Systems under this contract.

If work required by the Department requires the use of Lift Equipment, a predetermined amount of money is indicated in the Invitation for Bid (IFB) Header Text, which may be used to cover Lift Equipment rental costs.

Contractor will not initiate a Lift Equipment rental procurement without prior written approval of the Project Manager.

All Lift Equipment must be approved by the Project Manager prior to use.

The rental cost of Lift Equipment used will be reimbursable at the actual cost, including applicable tax, shown on vendor's (supplier's) invoices.

The Contractor must satisfy the requirements of the above "Invoice and Billing Instructions" section in order to receive payment for Lift Equipment under this contract. Contractor must attach the vendor's (supplier's) invoice to the corresponding Confirmation of Services Form (OS-501). Contractor will submit separate documentation for each site and each occurrence.

# Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles

## Statement of Work

### INVOICE AND BILLING INSTRUCTIONS

Upon the satisfactory completion of each HVAC Work Request, the contractor will complete a Confirmation of Service Form (OS-501), Attachment C. Contractor will then attach the corresponding HVAC Work Request (Attachment A) and all other supporting documentation, to Confirmation of Service Form (OS-501), and submit the original package of documents to the Project Manager.

The Project Manager will review the Confirmation of Service Form, and the supporting documentation, and contact the vendor to correct any mistakes.

The Contractor will submit a commercial invoice, which reflects the work described on the Confirmation of Service Form (OS-501), to the address shown on the first page of the Purchase Order.

The Contractor's invoice must reflect the Purchase Order items and descriptions and include the Purchase Order Number, Date of Service, Description of the Work Performed, and all other information as required by the Terms and Conditions, including item numbers and unit prices.

### STRATEGIC ENVIRONMENTAL MANAGEMENT PROGRAM (SEMP)

Before the start of any work, the Contractor must comply with PennDOT's STRATEGIC ENVIRONMENTAL MANAGEMENT PROGRAM (SEMP) requirements.

These requirements can be found on PENNDOT's website at:

<http://www.penndot.gov/>

To access program requirements on the website, select '*Forms, Pubs, & Maps*'.

Then type in '*SEMP*' in search field, and select the magnifying glass.

Then select '*Contractor Instructions for SEMP Awareness*'.

The Contractor is required to submit signed Contractor Information Form and PennDOT District 6 Contractor Employee SEMP Awareness Roster to the Purchasing Agent prior to starting work.

### LIQUIDATED DAMAGES

The Department will assess liquidated damages in accordance with the Terms and Conditions. Liquidated damages will NOT be assessed because of unavoidable delays in completion of work caused by the Department, other contractors employed by the Department or unforeseeable causes beyond the control of, and without fault or negligence of, the contractor.



# **Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles**

## **Statement of Work**

### HVAC MAINTENANCE AND REPAIR SERVICE SPECIFICATIONS

ITEM 1 – HVAC JOURNEYMAN-REGULAR HOURS

ITEM 2 – HVAC JOURNEYMAN-PREMIUM HOURS

DESCRIPTION – This work is to provide HVAC Journeyman (men) to perform HVAC System maintenance, troubleshooting, and repair services in accordance with the manufacturer specifications at the locations shown in Attachments D.

Work will be initiated through the HVAC Work Request (Attachment A).

Work under this contract performed during regular work hours will be paid for under Item 1.

If work under this contract cannot be performed during regular work hours, due to an adverse effect on Department operations or for other reasons, the work will have to be scheduled for after regular work hours, and or on weekends, and/or Holidays, in which case the work will be paid for under Item 2.

MEASUREMENT AND PAYMENT – Hour

ITEM 3 – Inspection of HVAC Systems at County Offices and all Stockpile Facilities (Fall)

DESCRIPTION - This work will consist of inspection of all HVAC Systems and related devices, at all county facilities, during the period shown in the above 'WORK SCHEDULE' section.

SERVICE – Perform inspection of all HVAC systems and related devices including but not limited to Heaters, Air Conditioners, switches, panels, and fuses. Determine which systems and/or related devices are functioning properly and not functioning properly in accordance with manufacturer's specification and record their exact locations. Furnish an inventory of HVAC systems and related devices which are in need of maintenance or repairs to the Project Manager immediately after the inspection.

MEASUREMENT AND PAYMENT – Each (Payment for Fall Inspection of HVAC Systems and related equipment performed at all county offices and stockpiles).

ITEM 4 – Inspection of HVAC Systems At County Offices and all Stockpile Facilities (Spring)

DESCRIPTION - This work will consist of inspection of all HVAC Systems and related devices, at all county facilities, during the period shown in the above 'WORK SCHEDULE' section.

# **Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles**

## **Statement of Work**

~~This work does not include inspections of window unit air conditioners or portable heating and air conditioning units.~~

SERVICE – Perform inspection of all HVAC systems and related devices including but not limited to Heaters, Air Conditioners, switches, panels, and fuses. Determine which systems and/or related devices are functioning properly and not functioning properly in accordance with manufacturer’s specification and record their exact locations. Furnish an inventory of HVAC systems and related devices which are in need of maintenance or repairs to the Project Manager immediately after the inspection.

MEASUREMENT AND PAYMENT – Each (Payment for Spring Inspection of HVAC Systems and related equipment performed at all county offices and stockpiles).

ITEM 5 – JOURNEYMAN PLUMBER - REGULAR HOURS

ITEM 6 – JOURNEYMAN PLUMBER - PREMIUM HOURS

DESCRIPTION – This work is to provide a plumber when needed to perform HVAC System maintenance, troubleshooting, and repair services in accordance with the manufacturer specifications at the locations shown in Attachments D.

Work will be initiated through the HVAC Work Request (Attachment A).

Work under this contract performed during regular work hours will be paid for under Item 5.

If work under this contract cannot be performed during regular work hours, due to an adverse effect on Department operations or for other reasons, the work will have to be scheduled for after regular work hours, and or on weekends, and/or Holidays, in which case the work will be paid for under Item 6.

MEASUREMENT AND PAYMENT – Hour

**Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and  
Repair Services for Montgomery County Offices and Stockpiles  
Statement of Work**

**Attachment A: HVAC Work Request**



**DISTRICT 6-0  
HVAC WORK REQUEST**

**CONTRACTOR:**

**HVAC SERVICE  
PHONE:  
FAX:**

**PENNDOT REP:**

**Name  
PHONE:  
FAX:**

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**COUNTY:**

**WORK REQUEST #:**

**DATE ISSUED:**

**DATE STARTED: \_\_\_\_\_**

**Yard#: LOCATION:**

**DATE DONE: \_\_\_\_\_**

**BUILDING #:**

---

**URGENT REPLY NEEDED:**

**Yes / No**

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**WORK REQUESTED:**

- 1)
- 2)
- 3)
- 4)
- 5)

**NOTIFY INSPECTOR OF RESULTS PRIOR TO WORK BEING DONE:**

**Attachment B: Contractor Representative**

**Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and  
Repair Services for Montgomery County Offices and Stockpiles  
Statement of Work**

This page is to be completed and submitted to the Purchasing Agent within three  
(3) days of notice of apparent low bidder status.

1. Contractor is to list Contractor's Representative: \_\_\_\_\_
  
2. Contractor is to list Contractor's Representative's 24/7 Telephone  
Number: \_\_\_\_\_
  
3. Contractor is to list Contractor's Representative's Email  
Address: \_\_\_\_\_
  
4. Contractor is to list Contractor's Representative's  
Title: \_\_\_\_\_

# Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles Statement of Work

## Attachment C: Confirmation of Services Report (OS-501)

OS-501 (10-14)



### CONFIRMATION OF SERVICE

Date Service Rendered: \_\_\_\_\_ SAP Vendor Number: \_\_\_\_\_  
 Contractor Name: \_\_\_\_\_ Address (1): \_\_\_\_\_  
 Phone: \_\_\_\_\_ Address (2): \_\_\_\_\_  
 PURCHASE ORDER #: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

(Reference line items on purchase order that match the services that were performed.)

PO Line #	Description / Product ID	Quantity	U.O.M.	Unit Price	Item Total	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
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					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
					\$0.00	
<input type="checkbox"/> Continue on page 2					Total of Page 1	\$ 0.00
					Total of Page 2	\$ 0.00
					Grand Total	\$ 0.00

Contractor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

PENNDOT USE ONLY		
I certify the services represented by the confirmation of service form above were received satisfactorily. Therefore, I approve payment be made.		
_____ Project Manager Signature	_____ Date (mm/dd/yyyy)	
I certify that I have entered a Goods Receipt in SAP for this service. (Goods Receipts should be entered within 48 hours per Management Directive 310.31)		
_____ SRM/R3 Receiver Signature	_____ Date (mm/dd/yyyy)	_____ SRM Confirmation # / R3 Material Document #

# Heating, Ventilation, and Air Conditioning System (HVAC) Maintenance and Repair Services for Montgomery County Offices and Stockpiles

## Statement of Work

### Attachment D: Office and Stockpile Locations, Address of Stockpiles, Type of Stockpile, and Type HVAC Equipment

STOCKPILE NAME	Address	No	All Season or Winter Stockpile	Name of HVAC Equipment(Manufacturer)	Heating Unit Only (Yes or No)	Air Conditioning Unit Only(Yes or No)	Both Heating & Air Condition(Yesor No)	Indicate if the unit is window, portable, central system, or built into the buidng	Model Number	Number of Units
Norristown (County Office)	Johnson Highway and Swede Road, Norristown PA 19404	01	All Season	Carrier Air			Yes	Central	48HJE012-541	1
Gladwyn	WB Interstate 76 near Gladwyn Exit, Gladwyne, PA 19035	05	Winter	Unknown	Yes			built into building	Unknown	1
Skippack	SR 73, 1.5 miles west of TR 113, Skippack, PA 19474	11	All Season	Unknown	Yes			built into building	Unknown	2
Blue Route	Germantown Pike at Blue Route, Plymouth Meeting, PA 19462	12	All Season	Armstrong Air			Yes	built into building	BCS2M30COONA1P-1	1
Pottstown	Evergreen Road, Pottstown, PA 19464 ( at Sanatoga Exit)	14	All Season	Gibson Air			Yes	built into building	GBSBM-024K-A	1
Black Rock	Upper Indian Head Road, Oaks, PA 19456	15	All Season	Armstrong Air			Yes	built into building	BCS2M30COONA1P-1	1
Red Hill	SR 29 south of Red Hill, Red Hill, PA 18076	16	All Season	Armstrong Air			Yes	built into building	BCS2M30COONA1P-1	1
PA 309	SR 309 NB, Lower Gwynedd, PA 19034	22	All Season	Unknown	Yes			built into building	Unknown	1

STOCKPILE NAME	Address	No	All Season or Winter Stockpile	Name of HVAC Equipment(Manufacturer)	Heating Unit Only (Yes or No)	Air Conditioning Unit Only(Yes or No)	Both Heating & Air Condition(Yesor No)	Indicate if the unit is window, portable, central system, or built into the buidng	Model Number	Number of Units
Montgomery County Material Lab	Johnson Highway and Swede Road, Norristown PA 19404	N/A	N/A	Carrier		Yes		Central System	Unknown	1