



## Collin County Purchasing

**2021-244**

### **HVAC Maintenance & Repairs**

Issue Date: 8/10/2021

Questions Deadline: 8/20/2021 02:00 PM (CT)

Response Deadline: 8/26/2021 02:00 PM (CT)

Collin County Purchasing

### **Contact Information**

Contact: Gina Zimmer

Address: Purchasing

Admin. Building

Ste.3160

2300 Bloomdale Rd.

Ste. 3160

McKinney, TX 75071

Phone: (972) 548-4119

Fax: (972) 548-4694

Email: [gzimmel@co.collin.tx.us](mailto:gzimmel@co.collin.tx.us)

## Event Information

Number: 2021-244  
Title: HVAC Maintenance & Repairs  
Type: Invitation for Bid  
Issue Date: 8/10/2021  
Question Deadline: 8/20/2021 02:00 PM (CT)  
Response Deadline: 8/26/2021 02:00 PM (CT)

## Ship To Information

Address: See Purchase Order  
McKinney, TX 75071

## Billing Information

Contact: Accounts Payable  
Address: Auditor  
Jack Hatchell Admin. Bldg  
Ste. 3100  
2300 Bloomdale Rd  
Ste. 3100  
McKinney, TX 75071  
Phone: 1 (972) 548-4733  
Email: [accountspayable@co.collin.tx.us](mailto:accountspayable@co.collin.tx.us)

## Bid Attachments

### General\_Instructions\_Bid.docx

General Instructions - Bid

[View Online](#)

### Terms\_of\_Contract\_Bid\_-\_2.10.21.docx

Terms of Contract - Bid

[View Online](#)

### Insurance\_Requirements\_Umbrella.doc

Minimum Insurance Requirements

[View Online](#)

### Special Conditions and Specifications 7.26.21.docx

Special Conditions and Specifications

[View Online](#)

### CIQ\_113015.pdf

Conflict of Interest Questionnaire

[View Online](#)

### HB 23-CIQ.docx

HB 23-CIQ

[View Online](#)

### W-9 rev 2018.pdf

W-9 Form

[View Online](#)

## Requested Attachments

### W-9

*(Attachment required)*

### Class "A" State of Texas Air Conditioning and Refrigerator Contractors License

*(Attachment required)*

Include license holder information.

## EPA Certification Type 2 or Universal Type 2 or 3

(Attachment required)

Include license holder information.

## 24-hour phone number and Contacts

(Attachment required)

Include 24-hour phone number and contacts for regular hours, after hours, weekends, holidays and emergencies.

## Conflict of Interest

Only if applicable

## Bid Attributes

### 1 eBid Notice

Collin County exclusively uses IonWave Technologies, Inc. (Collin County eBid) for the notification and dissemination of all solicitations. The receipt of solicitations through any other means may result in your receipt of incomplete specifications and/or addendums which could ultimately render your bid/proposal non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other means. Please initial.

(Required: Maximum 1000 characters allowed)

### 2 Contact Information

List the contact name, email address and phone number of the main person(s) Collin County should contact in reference to this solicitation. Contact(s) shall be duly authorized by the company, corporation, firm, partnership or individual to respond to any questions, clarification, and or offers in response to this solicitation.

(Required: Maximum 4000 characters allowed)

### 3 Exceptions

Do you take exception to the specifications? If so, by separate attachment, please state your exceptions.

☐ Yes ☐ No

(Required: Check only one)

### 4 Insurance Acknowledgement

I understand that the insurance requirements of this solicitation are required and are included in the submitted pricing. A certificate of insurance shall be submitted to the Purchasing department if I am awarded all or a portion of the resulting contract. Please initial.

(Required: Maximum 1000 characters allowed)

**5 Subcontractors**

State the business name of all subcontractors and the type of work they will be performing under this contract. If you are fully qualified to self-perform the entire contract, please respond with "Not Applicable-Self Perform".

---

---

---

---

---

---

(Required: Maximum 4000 characters allowed)

**6 Reference No. 1**

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references preferred. Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.

---

---

---

---

---

---

(Required: Maximum 4000 characters allowed)

**7 Reference No. 2**

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references preferred. Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.

---

---

---

---

---

---

(Required: Maximum 4000 characters allowed)

**8 Reference No. 3**

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references preferred. Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.

---

---

---

---

---

---

(Required: Maximum 4000 characters allowed)

**9 Cooperative Contracts**

As permitted under Title 8, Chapter 271, Subchapter F, Section 271.101 and 271.102 V.T.C.A. and Title 7, Chapter 791, Subchapter C, Section 791.025, V.T.C.A., other local governmental entities may wish to also participate under the same terms and conditions contained in this contract. Each entity wishing to participate must enter into an inter-local agreement with Collin County and have prior authorization from vendor. If such participation is authorized, all purchase orders will be issued directly from and shipped directly to the local governmental entity requiring supplies/services. Collin County shall not be held responsible for any orders placed, deliveries made or payment for supplies/services ordered by these entities. Each entity reserves the right to determine their participation in this contract. Would bidder be willing to allow other local governmental entities to participate in this contract, if awarded, under the same terms and conditions?

☐ Yes ☐ No

(Required: Check only one)

**10 Preferential Treatment**

The County of Collin, as a governmental agency of the State of Texas, may not award a contract to a nonresident bidder unless the nonresident's bid is lower than the lowest bid submitted by a responsible Texas resident bidder by the same amount that a Texas resident bidder would be required to underbid a nonresident bidder to obtain a comparable contract in the state in which the nonresident's principal place of business is located (Government Code, Title 10, V.T.C.A., Chapter 2252, Subchapter A).

1. Is your principal place of business in the State of Texas?
2. If your principal place of business is not in Texas, in which State is your principal place of business?
3. If your principal place of business is not in Texas, does your state favor resident bidders (bidders in your state) by some dollar increment or percentage?
4. If your state favors resident bidders, state by what dollar amount or percentage.

(Required: Maximum 4000 characters allowed)

**11 Debarment Certification**

I certify that neither my company nor an owner or principal of my company has been debarred, suspended or otherwise made ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension," as described in the Federal Register and Rules and Regulations. Please initial.

(Required: Maximum 1000 characters allowed)

**12 Immigration and Reform Act**

I declare and affirm that my company is in compliance with the Immigration and Reform Act of 1986 and all employees are legally eligible to work in the United States of America. I further understand and acknowledge that any non-compliance with the Immigration and Reform Act of 1986 at any time during the term of this contract will render the contract voidable by Collin County. Please initial.

(Required: Maximum 1000 characters allowed)

**13 Disclosure of Certain Relationships**

Chapter 176 of the Texas Local Government Code requires that any vendor considering doing business with a local government entity disclose the vendor's affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor. By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code. Please send completed forms to the Collin County County Clerk's Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071. Please initial.

(Required: Maximum 1000 characters allowed)

**14 Anti-Collusion Statement**

Bidder certifies that its Bid/Proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a Bid/Proposal for the same materials, services, supplies, or equipment and is in all respects fair and without collusion or fraud. No premiums, rebates or gratuities permitted; either with, prior to, or after any delivery of material or provision of services. Any such violation may result in Agreement cancellation, return of materials or discontinuation of services and the possible removal from bidders list. Please initial.

(Required: Maximum 1000 characters allowed)

**15 Disclosure of Interested Parties**

Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section. Section 2252.908 applies only to a contract entered into on or after January 1, 2016. Please initial.

(Required: Maximum 1000 characters allowed)

**16 Notification Survey**

In order to better serve our offerors, the Collin County Purchasing Department is conducting the following survey. We appreciate your time and effort expended to submit your bid. Should you have any questions or require more information please call (972) 548-4165. How did you receive notice of this request?

- ☐ Plano Star Courier   ☐ Plan Room   ☐ Collin County eBid Notification   ☐ Collin County Website  
☐ Other

(Required: Check only one)

1  
7**Bidder Acknowledgement**

Bidder acknowledges, understands the specifications, any and all addenda, and agrees to the bid terms and conditions and can provide the minimum requirements stated herein. Bidder acknowledges they have read the document in its entirety, visited the site, performed investigations and verifications as deemed necessary, is familiar with local conditions under which work is to be performed and will be responsible for any and all errors in Bid submittal resulting from Bidder's failure to do so. Bidder acknowledges the prices submitted in this Bid have been carefully reviewed and are submitted as correct and final. If Bid is accepted, vendor further certifies and agrees to furnish any and all products upon which prices are extended at the price submitted, and upon conditions in the specifications of the Invitation for Bid. Please initial.

(Required: Maximum 1000 characters allowed)

**Bid Lines**

1

**Package Header**

Hourly Rate for Class A Labor

Quantity:   1   UOM: hour Total: \$ Supplier Notes: 

- ☐ No bid
- ☐ Additional notes  
(Attach separate sheet)

**Package Items****1.1 Class A Labor- regular***(Response required)*Quantity:   1   UOM: hour Price: \$  Total: \$ Supplier Notes: 

- ☐ No bid
- ☐ Additional notes  
(Attach separate sheet)

**1.2 Class A Labor- overtime***(Response required)*Quantity:   1   UOM: hour Price: \$  Total: \$ Supplier Notes: 

- ☐ No bid
- ☐ Additional notes  
(Attach separate sheet)

**1.3 Class A Labor- weekend***(Response required)*Quantity:   1   UOM: hour Price: \$  Total: \$ Supplier Notes: 

- ☐ No bid
- ☐ Additional notes  
(Attach separate sheet)

**1.4 Class A Labor- holiday**  
(Response required)

Quantity:   1   UOM: hour Price: \$  Total: \$

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

**2 Package Header**

Hourly Rate for EPA Certification Type 2 or Universal Type 2 or 3 Labor

Quantity:   1   UOM: hour Total: \$

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

**Package Items**

**2.1 Hourly Rate for EPA Cert. Type 2 or Universal Type 2 or 3 Labor - regular**

Quantity:   1   UOM: hour Price: \$  Total: \$

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

**2.2 Hourly Rate for EPA Cert. Type 2 or Universal Type 2 or 3 Labor- overtime**

Quantity:   1   UOM: hour Price: \$  Total: \$

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

**2.3 Hourly Rate for EPA Cert. Type 2 or Universal Type 2 or 3 Labor - weekend**

Quantity:   1   UOM: hour Price: \$  Total: \$

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

**2.4 Hourly Rate for EPA Cert. Type 2 or Universal Type 2 or 3 Labor - holiday**

Quantity:   1   UOM: hour Price: \$  Total: \$

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

**3 Package Header**

Hourly Rate for Helper

Quantity:   1   UOM: hour Total: \$



Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

## Package Items

### 3.1 Hourly Rate for Helper- regular

Quantity:   1   UOM: hour Price:  Total:

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

### 3.2 Hourly Rate for Helper- overtime

Quantity:   1   UOM: hour Price:  Total:

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

### 3.3 Hourly Rate for Helper- weekend

Quantity:   1   UOM: hour Price:  Total:

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

### 3.4 Hourly Rate for Helper- holiday

Quantity:   1   UOM: hour Price:  Total:

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

## 4 Percent Markup on Material Costs

Total:  %

Supplier Notes: \_\_\_\_\_  
\_\_\_\_\_

☐ No bid  
☐ Additional notes  
(Attach separate sheet)

Supplier Information

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

Contact Name: \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Supplier Notes

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

The undersigned hereby certifies the foregoing bid submitted by the company listed below hereinafter called "bidder" is the duly authorized agent of said company and the person signing said bid has been duly authorized to execute same. Bidder affirms that they are duly authorized to execute this contract; this company; corporation, firm, partnership or individual has not prepared this bid in collusion with any other bidder or other person or persons engaged in the same line of business; and that the contents of this bid as to prices, terms and conditions of said bid have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this bid.

Print Name

Signature

## 1.0 GENERAL INSTRUCTIONS

### 1.0.1 Definitions

1.0.1.1 Bidder: refers to submitter.

1.0.1.2 Vendor/Contractor/Provider: refers to a Successful Bidder/Contractor/Service Provider.

1.0.1.3 Submittal: refers to those documents required to be submitted to Collin County, by a Bidder.

1.0.1.4 IFB: refers to Invitation For Bid.

1.1 If Bidder does not wish to submit an offer at this time, please submit a No Bid.

1.2 Awards shall be made not more than ninety (90) days after the time set for opening of submittals.

1.3 Collin County is always conscious and extremely appreciative of your time and effort in preparing your submittal.

1.4 Collin County exclusively uses ionWave Technologies, Inc. (Collin County eBid) for the notification and dissemination of all solicitations. The receipt of solicitations through any other company may result in your receipt of incomplete specifications and/or addendums which could ultimately render your bid non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other company.

1.5 A bid may not be withdrawn or canceled by the bidder prior to the ninety-first (91<sup>st</sup>) day following public opening of submittals and only prior to award.

1.6 It is understood that Collin County, Texas reserves the right to accept or reject any and/or all Bids for any or all products and/or services covered in an Invitation For Bid (IFB), and to waive informalities or defects in submittals or to accept such submittals as it shall deem to be in the best interest of Collin County.

1.7 All IFB's submitted in hard copy paper form shall be submitted in a sealed envelope, plainly marked on the outside with the IFB number and name. A hard copy paper form submittal shall be manually signed in ink by a person having the authority to bind the firm in a contract. Submittals shall be mailed or hand delivered to the Collin County Purchasing Department.

1.8 No oral, telegraphic or telephonic submittals will be accepted. IFB's may be submitted in electronic format via Collin County eBid.

1.9 All Invitation For Bids (IFB) submitted electronically via Collin County eBid shall remain locked until official date and time of opening as stated in the Special Terms and Conditions of the IFB.

1.10 Time/date stamp clock in Collin County Purchasing Department shall be the official time of receipt for all Invitation for Bids (IFB) submitted in hard copy paper form. IFB's received in the Collin County Purchasing Department after submission deadline shall be considered void and unacceptable. Absolutely no late submittals will be considered. Collin County accepts no responsibility for technical difficulties related to electronic submittals.

1.11 For hard copy paper form submittals, any alterations made prior to opening date and time must be initialed by the signer of the IFB guaranteeing authenticity. Submittals cannot be altered or amended after submission deadline.

1.12 Collin County is by statute exempt from the State Sales Tax and Federal Excise Tax; therefore, the prices submitted shall not include taxes.

1.13 Any interpretations, corrections and/or changes to an Invitation For Bid, and related Specifications or extensions to the opening/receipt date will be made by addenda to the respective document by the Collin County Purchasing Department. Questions and/or clarification requests must be submitted no later than the date specified in the solicitation. Those received at a later date may not be addressed prior to the public opening. Sole authority to authorize addenda shall be vested in Collin County Purchasing Agent as entrusted by the Collin County Commissioners Court. Addenda may be transmitted electronically via Collin County eBid.

1.13.1 Addenda will be transmitted to all that are known to have received a copy of the IFB/RFQ/RFP/RFI/CSP and related Specifications. However, it shall be the sole responsibility of the Bidder/Quoter/Offeror to verify issuance/non-issuance of addenda and to check all avenues of document availability (i.e. **Collin County eBid** <https://collincountytexas.com>, telephoning Purchasing Department directly, etc.) prior to opening/receipt date and time to insure Bidder/Quoter/Offeror's receipt of any addenda issued. Bidder/Quoter/Offeror shall acknowledge receipt of all addenda.

1.14 All materials and services shall be subject to Collin County approval.

1.15 Collin County reserves the right to make award in whole or in part as it deems to be in the best interest of the County.

1.16 Any reference to model/make and/or manufacturer used in specifications is for descriptive purposes only. Products/materials of like quality will be considered.

1.17 Bidders taking exception to the specifications shall do so at their own risk. By offering substitutions, Bidder shall state these exceptions in the section provided in the IFB or by attachment. Exception/substitution, if accepted, must meet or exceed specifications stated therein. Collin County reserves the right to accept or reject any and/or all of the exception(s)/substitution(s) deemed to be in the best interest of the County.

1.19 Minimum Standards for Responsible Prospective Bidders: A prospective Bidder must meet the following minimum requirements:

1.19.1 have adequate financial resources, or the ability to obtain such resources as required;

1.19.2 be able to comply with the required or proposed delivery/completion schedule;

1.19.3 have a satisfactory record of performance;

1.19.4 have a satisfactory record of integrity and ethics;

1.19.5 be otherwise qualified and eligible to receive an award.

Collin County may request documentation and other information sufficient to determine Bidder's ability to meet these minimum standards listed above.

1.20 Vendor shall bear any/all costs associated with its preparation of an IFB.

1.21 Public Information Act: Collin County is governed by the Texas Public Information Act, Chapter 552 of the Texas Government Code. All information submitted by prospective bidders during the bidding process is subject to release under the Act.

1.22 The Bidder shall comply with Commissioners Court Order No. 2004-167-03-11, County Logo Policy.

1.23 Interlocal Agreement: Successful bidder agrees to extend prices and terms to all entities that has entered into or will enter into joint purchasing interlocal cooperation agreements with Collin County. Delivery to governmental entities located within Collin County will be at no additional charge or as otherwise provided for in the award

document. Delivery charges, if any, for governmental entities located outside of Collin County shall be negotiated between the Vendor and each governmental entity.

1.24 Bid Openings: All bids submitted will be read at the county's regularly scheduled bid opening for the designated project. However, the reading of a bid at bid opening should be not construed as a comment on the responsiveness of such bid or as any indication that the county accepts such bid as responsive.

The county will make a determination as to the responsiveness of bids submitted based upon compliance with all applicable laws, Collin County Purchasing Guidelines, and project documents, including but not limited to the project specifications and contract documents. The county will notify the successful bidder upon award of the contract and, according to state law; all bids received will be available for inspection at that time.

1.25 Bidder shall comply with all local, state and federal employment and discrimination laws and shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin or any other class protected by law.

## 2.0 TERMS OF CONTRACT

2.1 A bid, when properly accepted by Collin County, shall constitute a contract equally binding between the Vendor/Contractor/Provider and Collin County. No different or additional terms will become part of this contract with the exception of a Change Order.

2.2 No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All Amendments and/or Change Orders to the contract will be made in writing by Collin County Purchasing Agent.

2.3 No public official shall have interest in the contract, in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5, Subtitle C, Chapter 171.

2.4 The Vendor/Contractor/Provider shall comply with Commissioners Court Order No. 96-680-10-28, Establishment of Guidelines & Restrictions Regarding the Acceptance of Gifts by County Officials & County Employees.

2.5 Design, strength, quality of materials and workmanship must conform to the highest standards of manufacturing and engineering practice.

2.6 Bids must comply with all federal, state, county and local laws concerning the type(s) of product(s)/service(s)/equipment/project(s) contracted for, and the fulfillment of all ADA (Americans with Disabilities Act) requirements.

2.7 All products must be new and unused, unless otherwise specified, in first-class condition and of current manufacture. Obsolete products, including products or any parts not compatible with existing hardware/software configurations will not be accepted.

2.8 Vendor/Contractor/Provider shall provide any and all notices as may be required under the Drug-Free Work Place Act of 1988, 28 CFR Part 67, Subpart F, to its employees and all sub-contractors to insure that Collin County maintains a drug-free work place.

2.9 Vendor/Contractor/Provider shall defend, indemnify and save harmless Collin County and all its officers, agents and employees and all entities, their officers, agents and employees who are participating in this contract from all suits, claims, actions, damages (including personal injury and or property damages), or demands of any character, name and description, (including attorneys' fees, expenses and other defense costs of any nature) brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of Vendor/Contractor/Provider's breach of the contract arising from an award, and/or any negligent act, error, omission or fault of the Vendor/Contractor/Provider, or of any agent, employee, subcontractor or supplier of Vendor/Contractor/Provider in the execution of, or performance under, any contract which may result from an award. Vendor/Contractor/Provider shall pay in full any judgment with costs, including attorneys' fees and expenses which are rendered against Collin County and/or participating entities arising out of such breach, act, error, omission and/or fault.

2.10 Expenses for Enforcement. In the event either Party hereto is required to employ an attorney to enforce the provisions of this Agreement or is required to commence legal proceedings to enforce the provisions hereof, the prevailing Party shall be entitled to recover from the other, reasonable attorney's fees and court costs incurred in connection with such enforcement, including collection.

2.11 If a contract, resulting from a Collin County IFB is for the execution of a public work, the following shall apply:

2.11.1 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Payment Bond if the contract is in excess of \$25,000.00. Such bond shall

be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56<sup>th</sup> Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.11.2 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Performance Bond if the contract is in excess of \$100,000.00. Such bond shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56<sup>th</sup> Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.12 Purchase Order(s) shall be generated by Collin County to the vendor. Collin County will not be responsible for any orders placed/delivered without a valid purchase order number.

2.13 The contract shall remain in effect until any of the following occurs: delivery of product(s) and/or completion and acceptance by Collin County of product(s) and/or service(s), contract expires or is terminated by either party with thirty (30) days written notice prior to cancellation and notice must state therein the reasons for such cancellation. Collin County reserves the right to terminate the contract immediately in the event the Vendor/Contractor/Provider fails to meet delivery or completion schedules, or otherwise perform in accordance with the specifications. Breach of contract or default authorizes the County to purchase elsewhere and charge the full increase in cost and handling to the defaulting Vendor/Contractor/Provider.

2.14 Collin County Purchasing Department shall serve as Contract Administrator or shall supervise agents designated by Collin County.

2.15 All delivery and freight charges (FOB Inside delivery at Collin County designated locations) are to be included as part of the bid price. All components required to render the item complete, installed and operational shall be included in the total bid price. Collin County will pay no additional freight/delivery/installation/setup fees.

2.16 Vendor/Contractor/Provider shall notify the Purchasing Department immediately if delivery/completion schedule cannot be met. If delay is foreseen, the Vendor/Contractor/Provider shall give written notice to the Purchasing Agent. The County has the right to extend delivery/completion time if reason appears valid.

2.17 The title and risk of loss of the product(s) shall not pass to Collin County until Collin County actually receives and takes possession of the product(s) at the point or points of delivery. Collin County shall generate a purchase order(s) to the Vendor/Contractor/Provider and the purchase order number must appear on all itemized invoices.

2.18 Invoices shall be mailed directly to the Collin County Auditor's Office, 2300 Bloomdale Road, Suite 3100, McKinney, Texas 75071. All invoices shall show:

2.18.1 Collin County Purchase Order Number;

2.18.2 Vendor's/Contractor's/Provider's Name, Address and Tax Identification Number;

2.18.3 Detailed breakdown of all charges for the product(s) and/or service(s) including applicable time frames.

2.19 Payment will be made in accordance with V.T.C.A., Government Code, Title 10, Subtitle F, Chapter 2251.

2.20 All warranties shall be stated as required in the Uniform Commercial Code.

2.21 The Vendor/Contractor/Provider and Collin County agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.

2.22 The Vendor/Contractor/Provider agree to protect Collin County from any claims involving infringements of patents and/or copyrights.

2.23 The contract will be governed by the laws of the State of Texas. Should any portion of the contract be in conflict with the laws of the State of Texas, the State laws shall invalidate only that portion. The remaining portion of the contract shall remain in effect. The contract is performable in Collin County, Texas.

2.24 The Vendor/Contractor/Provider shall not sell, assign, transfer or convey the contract, in whole or in part, without the prior written approval from Collin County.

2.25 The apparent silence of any part of the specification as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the specification shall be made on the basis of this statement.

2.26 Vendor/Contractor/Provider shall not fraudulently advertise, publish or otherwise make reference to the existence of a contract between Collin County and Vendor/Contractor/Provider for purposes of solicitation. As exception, Vendor/Contractor/Provider may refer to Collin County as an evaluating reference for purposes of establishing a contract with other entities.

2.27 The Vendor/Contractor/Provider understands, acknowledges and agrees that if the Vendor/Contractor/Provider subcontracts with a third party for services and/or material, the primary Vendor/Contractor/Provider (awardee) accepts responsibility for full and prompt payment to the third party. Any dispute between the primary Vendor/Contractor/Provider and the third party, including any payment dispute, will be promptly remedied by the primary vendor. Failure to promptly render a remedy or to make prompt payment to the third party (subcontractor) may result in the withholding of funds from the primary Vendor/Contractor/Provider by Collin County for any payments owed to the third party.

2.28 Vendor/Contractor/Provider shall provide Collin County with diagnostic access tools at no additional cost to Collin County, for all Electrical and Mechanical systems, components, etc., procured through this contract.

2.29 Criminal History Background Check: If required, ALL individuals may be subject to a criminal history background check performed by Collin County prior to access being granted to Collin County facilities. Upon request, Vendor/Contractor/Provider shall provide list of individuals to the Collin County Purchasing Department within five (5) working days.

2.30 Non-Disclosure Agreement: Where applicable, vendor shall be required to sign a non-disclosure agreement acknowledging that all information to be furnished is in all respects confidential in nature, other than information which is in the public domain through other means and that any disclosure or use of same by vendor, except as provided in the contract/agreement, may cause serious harm or damage to Collin County. Therefore, Vendor agrees that Vendor will not use the information furnished for any purpose other than that stated in contract/agreement, and agrees that Vendor will not either directly or indirectly by agent, employee, or representative disclose this information, either in whole or in part, to any third party, except on a need to know basis for the purpose of evaluating any possible transaction. This agreement shall be binding upon Collin County and Vendor, and upon the directors, officers, employees and agents of each.

2.31 Vendors/Contractors/Providers must be in compliance with the Immigration and Reform Act of 1986 and all employees specific to this solicitation must be legally eligible to work in the United States of America.

2.32 Certification of Eligibility: This provision applies if the anticipated Contract exceeds \$100,000.00 and as it relates to the expenditure of federal grant funds. By submitting a bid or proposal in response to this solicitation, the Bidder certifies that at the time of submission, he/she is not on the Federal Government's list of suspended, ineligible, or debarred contractors. In the event of placement on the list between the time of bid/proposal submission and time of award, the Bidder will notify the Collin County Purchasing Agent. Failure to do so may result in terminating this contract for default.



2.33 Notice to Vendors/Contractors/Providers delivering goods or performing services within the Collin County Detention Facility: The Collin County Detention Facility houses persons who have been charged with and/or convicted of serious criminal offenses. When entering the Detention Facility, you could: (1) hear obscene or graphic language; (2) view partially clothed male inmates; (3) be subjected to verbal abuse or taunting; (4) risk physical altercations or physical contact, which could be minimal or possibly serious; (5) be exposed to communicable or infectious diseases; (6) be temporarily detained or prevented from immediately leaving the Detention Facility in the case of an emergency or “lockdown”; and (7) subjected to a search of your person or property. While the Collin County Sheriff’s Office takes every reasonable precaution to protect the safety of visitors to the Detention Facility, because of the inherently dangerous nature of a Detention Facility and the type of the persons incarcerated therein, please be advised of the possibility of such situations exist and you should carefully consider such risks when entering the Detention Facility. By entering the Collin County Detention Facility, you acknowledge that you are aware of such potential risks and willingly and knowingly choose to enter the Collin County Detention Facility.

2.34 Delays and Extensions of Time when applicable:

2.34.1 If the Vendor/Contractor/Provider is delayed at any time in the commence or progress of the Work by an act or neglect of the Owner or Architect/Engineer, or of an employee of either, or of a separate contractor employed by the Owner, or by changes ordered in the Work, or by labor disputes, fire, unusual delay in deliveries, unavoidable casualties or other causes beyond the Vendor/Contractor/Provider's control, or by delay authorized by the Owner pending mediation and arbitration, or by other causes which the Owner or Architect/Engineer determines may justify delay, then the Contract Time shall be extended by Change Order for such reasonable time as the Owner/Architect may determine.

2.34.2 If adverse weather conditions are the basis for a Claim for additional time, such Claim shall be documented by data substantiating that weather conditions were abnormal for the period of time and could not have been reasonably anticipated, and that the weather conditions had an adverse effect on the scheduled construction.

2.35 Disclosure of Certain Relationships: Chapter 176 of the Texas Local Government Code requires that any vendor considering doing business with a local government entity disclose the vendor’s affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor. By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code. Please send completed forms to the Collin County, County Clerk's Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071.

2.36 Disclosure of Interested Parties: Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section. Section 2252.908 applies only to a contract entered into on or after January 1, 2016.

2.37 Vendors/Contractors/Providers must be in compliance with the provisions of Section 2252.152 and Section 2252.153 of the Texas Government Code which states, in part, contracts with companies engaged in business with Iran, Sudan, or Foreign Terrorist Organizations are prohibited. A governmental entity may not enter into a contract with a company that is listed on the Comptroller of the State of Texas website identified under Section 806.051, Section 807.051 or Section 2253.253 which do business with Iran, Sudan or any Foreign Terrorist Organization. This Act is effective September 1, 2017.

2.38 Force Majeure: No party shall be liable or responsible to the other party, nor be deemed to have defaulted under or breached this Agreement, for any failure or delay in fulfilling or performing any term of this Agreement, when and to the extent such failure or delay is caused by or results from acts beyond the affected party's reasonable control, including, without limitation: acts of God; flood, fire or explosion; war, invasion, riot or other civil unrest; actions, embargoes or blockades in effect on or after the date of this Agreement; or national or regional emergency (each of the foregoing, a "Force Majeure Event"). A party whose performance is affected by a Force Majeure Event shall give notice to the other party, stating the period of time the occurrence is expected to continue and shall use diligent efforts to end the failure or delay and minimize the effects of such Force Majeure Event.

**NOTE:** All other terms and conditions (i.e. Insurance Requirements, Bond Requirements, etc.) shall be stated in the individual IFB Solicitation documents as Special Terms, Conditions and Specifications.

### 3.0 INSURANCE REQUIREMENTS

3.1 Before commencing work, the vendor shall be required, at its own expense, to furnish the Collin County Purchasing Agent with certified copies of all insurance certificate(s) indicating the coverage to remain in force throughout the term of this contract.

3.1.1 **Commercial General Liability** insurance including but not limited to the coverage indicated below. Coverage shall not exclude or limit Products/Completed Operations, Contractual Liability, or Cross Liability. Coverage must be written on occurrence form.

- Each Occurrence: \$1,000,000
- Personal Injury & Adv. Injury: \$1,000,000
- Products/Completed Operation Aggregate: \$2,000,000
- General Aggregate: \$2,000,000

3.1.2 **Workers Compensation** insurance as required by the laws of Texas, and Employers' Liability.

Employers' Liability

- Liability, Each Accident: \$500,000
- Disease-Each Employee: \$500,000
- Disease – Policy Limit: \$500,000

3.1.3 **Commercial Automobile Liability** insurance which includes any automobile (owned, non-owned, and hired vehicles) used in connection with the contract.

- Combined Single Limit – Each Accident: \$1,000,000

3.1.4 **Umbrella/Excess Liability** insurance.

- Each Occurrence/Aggregate: \$1,000,000

3.2 With reference to the foregoing insurance requirement, the vendor shall endorse applicable insurance policies as follows:

3.2.1 A waiver of subrogation in favor of Collin County, its officials, employees, volunteers and officers shall be provided for General Liability, Commercial Automobile Liability, and Workers' Compensation.

3.2.2 The vendor's insurance coverage shall name Collin County as additional insured under the General Liability policy.

3.2.3 All insurance policies shall be endorsed to require the insurer to immediately notify Collin County of any decrease in the insurance coverage limits.

3.2.4 All insurance policies shall be endorsed to the effect that Collin County will receive at least thirty (30) days notice prior to cancellation, non-renewal or termination of the policy.

3.2.5 All copies of Certificates of Insurance shall reference the project/contract number.

3.3 All insurance shall be purchased from an insurance company that meets the following requirements:

3.3.1 A financial rating of A-VII or higher as assigned by the BEST Rating Company or equivalent.

3.4 Certificates of Insurance shall be prepared and executed by the insurance company or its authorized agent, and shall contain provisions representing and warranting the following:

3.4.1 Sets forth all endorsements and insurance coverages according to requirements and instructions contained herein.

3.4.2 Sets forth the notice of cancellation or termination to Collin County.

#### 4.0 SPECIAL CONDITIONS AND SPECIFICATIONS

- 4.1 **Authorization:** By order of the Commissioners Court of Collin County, Texas, sealed bids will be received for HVAC Maintenance & Repairs, IFB 2021-244.
- 4.2 **Purpose:** The intended purpose for this IFB is to solicit qualified vendors for Collin County who are authorized, accredited and certified to perform mechanical service and repairs for Collin County buildings and facilities. Services may include the following: Air Handling Equipment, Coils, Boilers, Pumps, Air Compressors, DX Reciprocating equipment, Expansion System Piping, as well as any associated auxiliary equipment. The contractor shall perform all maintenance, repair or services adhering to all manufacturer guidelines and in strict accordance with all applicable Federal, State and Local laws and codes.
- 4.3 **Term:** Provide for a term contract commencing on October 1, 2021 and continuing through and including, September 30, 2022 with the option of four (4) one (1) year renewals.
- 4.4 **Funding:** Funds for payment have been provided through the Collin County budget approved by the Commissioners Court for this fiscal year only. State of Texas statutes prohibit the County from any obligation of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise past the end of the current Collin County fiscal year shall be subject to budget approval.
- 4.5 **Price Reduction:** If during the life of the contract, the Contractor's net prices to its customers for the same product(s) and/or services shall be reduced below the contracted price, it is understood and agreed that the County shall receive such price reduction.
- 4.6 **Price Re-determination:** A price re-determination may be considered by Collin County only at the anniversary date of the contract. The anniversary date will be October 1<sup>st</sup> of each year. All requests for price re-determination shall be in written form, and shall be submitted at a minimum of ninety (90) days prior to the anniversary date and shall include documents supporting price re-determination such as Manufacturer's direct cost, postage rates, Railroad Commission rates, Federal/State minimum wage law, Federal/State unemployment taxes, F.I.C.A., Insurance Coverage Rates, etc. Collin County reserves the right to accept or reject any/all of the price re-determination as it deems to be in the best interest of the County.
- 4.7 **Approximate usage:** Approximate usage does not constitute an order, but only implies the probable quantity Collin County will use. Services will be ordered on an as-needed basis. The annual value of this contract is \$70,000.
- 4.8 **Evaluation and Award:** Award of the contract shall be made to the responsive bidder(s) who submits the lowest and best bid meeting specifications. The County reserves the right to award bid in whole or by line item as the County deems in its best interest. Collin County further reserves the right to make a primary and secondary award on this contract.

The bidder's past experience of honoring contracts at the bid price, as well as their past service history with Collin County, will be an important consideration in the evaluation of the lowest and best bid.

Bidders may be asked to submit additional references and evidence of possession of such equipment and tools as may be needed to perform all work in an expeditious, safe and satisfactory manner. Bidders failing to provide the information necessary for the evaluation of the bid, including licenses and certifications, may be considered non-responsive.

4.9 **Testing:** Testing may be performed at the request of Collin County, by an agent so designated by the County, without expense to Collin County.

4.10 **Subcontractors:** Contractor shall state names of all subcontractors and the type of work they will be performing. If a Contractor fails to specify a subcontractor, then the Contractor shall be deemed to have agreed to be fully qualified to perform the contract without a subcontractor, and that the Contractor will fully perform the requirements of the contract.

No Contractor whose bid is accepted shall (a) substitute any subcontractor, or (b) permit a subcontract to be voluntarily assigned or transferred or allow it to be performed by anyone other than the original subcontractor listed in the original bid without approval in writing from the Collin County Purchasing Department.

The successful Contractor further agrees that Collin County and its agents, servants and employees shall not be liable for any loss or damage resulting from personal injury, physical loss, harassment of or discrimination against employee or other violations of the provisions of this contract occasioned by the acts or omissions of the successful Contractor's sub-contractors, their agents or employees. The indemnification provisions of this contract shall apply to all sub-contractors

4.11 **Background Checks:** Once awarded the contract, a mandatory background check performed by Collin County will be required for all persons who will work onsite.

4.12 **Licensing/Qualifications:**

4.12.1 All bidders must have as a minimum the following licenses and submit copies of them with their bids:

4.12.1.1 Class "A" State of Texas Air Conditioning and Refrigeration Contractors License

4.12.1.2 EPA Certification Type 2 or Universal Type 2 or 3

4.12.2 If any changes and/or mechanics are added/deleted during the term of the contract, Contractor must provide updated copies of license/certification to the Facilities Maintenance Department. Contractor must provide a copy of License/Certification of all personnel that will be working onsite.

**4.13 Repair Response Time:**

- 4.13.1 Standard hours of work shall be 7:00 a.m. through 4:00 p.m. Monday through Friday excluding Collin County recognized holidays.
- 4.13.2 Non-standard hours shall be all hours outside the standard hours listed above including Collin County recognized holidays.
- 4.13.3 The company shall have a minimum mechanical staff of ten (10) people and shall be capable of responding to a service problem within four (4) hours from time of call.
- 4.13.4 The company must have a 24-hour response phone number for all calls. Callback time after emergency phone number is called will be no longer than thirty (30) minutes.
- 4.13.5 If the primary awarded Contractor is not able to respond within the required time constraint, the County has the option to contact the secondary awarded Contractor.
- 4.13.6 Contractor must have sufficient staffing/vehicles in order to provide service at more than one location, if requested.
- 4.13.7 Contractor's staff/vehicles shall have radio communications and/or cell phone to ensure communication can be made.
- 4.13.8 Scope of each job requested will dictate the appropriate staffing level required for service.
- 4.13.9 Time shall begin once the crew arrives at the work site. There will be no charges for travel to and from the work site. Any overtime hours must be pre-approved by Collin County Facilities prior to work being done in order for overtime pay to be approved to be paid by Collin County.
- 4.13.10 Contractor shall notify designated Collin County Facilities department personnel upon arriving at the repair location.

**4.14 Parts and Service:**

- 4.14.1 All parts purchased shall be from the original equipment manufacturer. They shall meet ASTM and ASME standards.
- 4.14.2 Payment to the Contractor for parts used on each service will be reimbursed at actual cost, plus a percentage, provided Contractor's invoice relative to such purchase is attached to the Contractor's billing invoice.
- 4.14.3 There will be no minimum charge on parts and labor.
- 4.14.4 All work performed shall be in accordance with all applicable statutes, ordinances, codes, or regulation of Federal, State and Local Authorities having jurisdiction in effect.
- 4.14.5 The Contractor shall comply with all established standards provided by OSHA, UL, ASME, AGA, AMCA, ANSI, ASHRAE, ARI, NJPA, State Fire Insurance Regulatory Bodies, IRI and FM.
- 4.14.6 All welding shall comply with ASME Section IX and all welders shall be certified.
- 4.14.7 Hot work permits are required for all cutting, welding, soldering, torch or open flame work.
- 4.14.8 A refrigerant status report shall be executed each time refrigerant is added to, or removed from any air conditioning or refrigeration machine. This form must comply with EPA guidelines in form and content and shall be documented on report to the County.

- 4.14.9 Contractor shall be responsible for obtaining and paying for all permits required. Contractor shall be reimbursed actual costs for such permits by Collin County provided that a paid receipt is attached to the Contractor's billing invoice.
  - 4.14.10 For any project with a cost of over \$500.00, Contractor must contact the designated Collin County Facilities personnel to obtain proper approval prior to making repairs.
  - 4.14.11 Collin County reserves the right to prepare a scope of work and require a quote from the Contractor with a complete breakdown of material and labor costs. If required, Contractor agrees to provide pertinent bonds for each job quoted.
  - 4.14.12 The County further reserves the right to supply all or part of the materials on any project.
- 4.15 **Systems:** Personnel responding to service requests from Collin County Facilities department must be capable of working on a variety of different HVAC systems, including but not limited to:
- 4.15.1 1DX split air conditioning units for all refrigerants, 1.5 to 7.5 tons in size with up-flow or horizontal-flow, air handling units with natural gas or electric heat with electronic thermostats (Trane, Carrier, York, Lennox, Comfortmaker, Armstrong, Goodman, Bryant, Heil, ArcoAir).
  - 4.15.2 DX heat pump split air conditioning units for all refrigerants, 1.5 to 15 tons in size, with up-flow or horizontal-flow air handling units, electric emergency heat, electronic thermostats (Trane, Carrier, Lennox).
  - 4.15.3 Rooftop DX package air conditioning units for all refrigerants, 5 ton to 15 tons in size, gas or electric heat, outside air economizer, powered exhaust, electronic thermostats (Trane, Carrier).
  - 4.15.4 Rooftop DX heat pump package air conditioning units for all refrigerants, 5 ton to 15 tons in size, with natural gas or electric emergency heat, outside air economizer with electronic thermostats (Trane, Carrier).
  - 4.15.5 Natural gas hot water boilers for comfort heating and domestic heating water – most boilers size is approximately 1,200,000 BTUH (Raypac, Lochinvar).
  - 4.15.6 Forced air natural gas heaters approximate size 300,000 BTU to 400,000 BTU, electronic ignition or standing pilot (Dayton, Reverbray).
  - 4.15.7 Fire tube boilers 32,000 MBH (Cleaver-Brooks).
  - 4.15.8 Cooling towers, 600 tons to 1200 ton (Marley Ceramic, BAC).
  - 4.15.9 Water-cooled split and package units 2.5 to 4 ton (Liebert).
  - 4.15.10 Constant volume air handling units (Mammoth, Temptrol).
  - 4.15.11 Variable volume air handling units (Carrier).
  - 4.15.12 When modifying or renovating existing HVAC equipment, any and all related work associated with the Energy Management Systems (EMS), work must be completed by a designated EMS vendor. Collin County Facilities will provide the name and contact information of the vendor that applies to a particular system. The designated EMS vendor will be responsible for all installation, programming, and reprogramming to make all modified HVAC systems compatible with existing EMS systems.
  - 4.15.13 Collin County reserves the right to add/delete new equipment/systems as the County deems in its best interest.



**4.16 Warranty:**

- 4.16.1 Services provided by the Contractor shall be covered and warranted by the service contractor without direct Collin County subrogation.
- 4.16.2 The Contractor guarantees that all service and repairs provided shall be performed in a workmanlike manner. Any claim for defective workmanship will be provided to the Contractor by written notice. The Contractor agrees to remedy and redo any such service(s) in a timely manner without cost to the County. The Contractor also warrants against defects in materials, and workmanship of all the Contractor parts or components supplied hereunder from date of installation. If any part(s) or component(s) should prove defective during the aforementioned warranty period, the Contractor will at its option repair and replace any such items provided they were not damaged, abused or affected by chemical properties. THIS WARRANTY IS IN LIEU OF ALL OTHER WARRANTIES, EXPRESS, IMPLIED OR STATUTORY INCLUDING THE IMPLIED WARRANTIES OR MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. The Contractor's obligation to replair, replace or perform a service, on any defective part(s), component(s) or service shall be owner's exclusive remedy.
- 4.16.3 Warranty period should be stated on each invoice.

**4.17 Payment:**

- 4.17.1 Any and all work completed by the Contractor shall be reviewed and deemed acceptable by a member of the Collin County Facilities department prior to payment. Work found non-compliant with project plans and specification shall be remedied by the Contractor at its own expense.
- 4.17.2 As-built informal plans and/or drawings are to be submitted to the Facilities department by the Contractor, and any and all repairs upon completion.
- 4.17.3 Original invoices must be sent to the Collin County Auditor, 2300 Bloomdale Rd., Suite 3100, McKinney, TX 75071, email [accountspayable@collincountytexas.gov](mailto:accountspayable@collincountytexas.gov). Copies of all invoices must also be sent to Facilities Maintenance, 4600 Community Ave., McKinney, TX 75071.
- 4.17.4 Contractor must indicate on all applicable invoices the amount of refrigerant used/reclaimed/recycled for each job.
- 4.17.5 Invoices must have breakdown by technicians, part and supplies used on the job and include the purchase order number.

**4.18 Locations:** Locations for service will be stated on each Collin County purchase order.

- 4.18.1 Collin County reserves the right to add or delete locations as it deems to be in the best interest of the County. Locations include, but are not limited to:

900 Building  
900 East Park Blvd.  
Plano, TX 75074

Animal Shelter  
4750 Community Ave.  
McKinney, Texas 75071

Celina Radio Tower  
9165 CR 101  
Celina, TX 75009

920 Building  
920 East Park Blvd.  
Plano, TX 75074

Bloomdale Courthouse  
2100 Bloomdale  
McKinney, TX 75071

Central Plant  
4600 Community Ave.  
McKinney, Texas 75071

Copeville Radio Tower  
5528 FM 1778  
Farmersville, TX 75442

Elections  
2010 Redbud Blvd, Suite 102  
McKinney, TX 75069

Health Care Annex  
825 N. McDonald  
McKinney, Texas 75069

Jack Hatchell Administration  
2300 Bloomdale  
McKinney, TX 75071

JJAEP  
4650 Community Ave.  
McKinney, Texas 75071

JP-2 – Farmersville  
406 Raymond St, Suite A  
Farmersville, TX 75442

J.P.-2/Constable 4– Frisco  
8585 John Wesley Dr., Ste. 130  
Frisco, TX 75034

Justice Center  
4300 Community Ave.  
McKinney, Texas 75071

Collin County Sheriff's  
Administration  
4300 Community Ave.  
McKinney, Texas 75071

Collin County Detention Center  
4300 Community Ave.  
McKinney, Texas 75071

Juvenile Detention  
4700 Community Ave.  
McKinney, Texas 75071

Medical Examiner  
700-B Wilmeth Road  
McKinney, Texas 75069

Minimum Security  
4800 Community Ave.  
McKinney, Texas 75071  
Myers Park  
7117 County Road 166  
McKinney, Texas 75071

Haggard House  
7117 County Road 166  
McKinney, Texas 75071

The Landing  
7117 County Road 166  
McKinney, Texas 75071

Post Office Museum  
105 Chestnut  
McKinney, TX 75071

Public Works Service Center  
700-A Wilmeth Road  
McKinney, Texas 75069

Farmersville Public Works Barn  
1269 Hwy. 78 North  
Farmersville, Texas 75442

Public Works Red Barn  
700 A Wilmeth Road  
McKinney, Texas 75069

Verona Radio Tower  
8499 CR 502  
Blue Ridge, TX 75424

Wylie WIC  
303 S. Highway 78, Suite  
103/104  
Wylie, Texas 75098

# CONFLICT OF INTEREST QUESTIONNAIRE

**FORM CIQ****For vendor doing business with local governmental entity**

**This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.**

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

**OFFICE USE ONLY**

Date Received

**1 Name of vendor who has a business relationship with local governmental entity.**

**2** ☐ **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

**3 Name of local government officer about whom the information is being disclosed.**

\_\_\_\_\_  
Name of Officer

**4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.**

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes ☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes ☐ No

**5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.**

**6** ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

**7**

\_\_\_\_\_  
Signature of vendor doing business with the governmental entity

\_\_\_\_\_  
Date

## **CONFLICT OF INTEREST QUESTIONNAIRE**

### **For vendor doing business with local governmental entity**

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

**Local Government Code § 176.001(1-a):** "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

**Local Government Code § 176.003(a)(2)(A) and (B):**

- (a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

\*\*\*

- (2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed;  
or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

**Local Government Code § 176.006(a) and (a-1)**

- (a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

- (a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

- (1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

- (2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.

## **INFORMATION REGARDING** **CONFLICT OF INTEREST QUESTIONNAIRE**

During the 79<sup>th</sup> Legislative Session, House Bill 914 was signed into law effective September 1, 2015, which added Chapter 176 to the Texas Local Government Code. Recent changes have been made to Chapter 176 pursuant to HB23, which passed the 84<sup>th</sup> Legislative Session. Chapter 176 mandates the public disclosure of certain information concerning persons doing business or seeking to do business with Collin County, including family, business, and financial relationships such persons may have with Collin County officers or employees involved in the planning, recommending, selecting and contracting of a vendor for this procurement.

For a copy of Form CIQ and CIS:

[http://www.ethics.state.tx.us/filinginfo/conflict\\_forms.htm](http://www.ethics.state.tx.us/filinginfo/conflict_forms.htm)

The vendor acknowledges by doing business or seeking to do business with Collin County that he/she has been notified of the requirements under Chapter 176 of the Texas Local Government Code and that he/she is solely responsible for complying with the terms and conditions therein. Furthermore, any individual or business entity seeking to do business with Collin County who does not comply with this practice may risk award consideration of any County contract.

For a listing of current Collin County Officers:

<http://www.collincountytx.gov/government/Pages/officials.aspx>

At the time of this solicitation being released, the following are known to be involved in the planning, recommending, selecting, and contracting for the attached procurement:

Department:

Rick Monk – Facilities Direction

Laszlo Vadasz - Facilities Superintendent

Rickee Harris – HVAC Technical Coordinator

Purchasing:

Michelle Charnoski, NIGP-CPP, CPPB – Purchasing Agent

Marci Chrismon – Assistant Purchasing Agent

Gina Zimmer, CPPB - Buyer II

Commissioners Court:

Chris Hill – County Judge

Susan Fletcher – Commissioner Precinct No. 1

Cheryl Williams – Commissioner Precinct No. 2

Darrell Hale – Commissioner Precinct No. 3

Duncan Webb – Commissioner Precinct No. 4

# Request for Taxpayer Identification Number and Certification

Give Form to the  
requester. Do not  
send to the IRS.

► Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-				-	
or									
Employer identification number									
				-					

## Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ►	Date ►

## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*