



REQUEST FOR PROPOSAL

RFP #	181001
RFP Issued	June 18, 2018
Title	Vertical Transportation Maintenance Services
Site Visit	N/A
Questions/Clarifications	June 29, 2018, 5PM PST
Bid Due Date	July 11, 2018, 5PM PST
Contract Award	July 16, 2018
Term	3 Years Plus 2 One-Year Options
Procurement Contact	Theresa Harris
Contact Email	theresaharris@sandiego.edu

SECTION I - BACKGROUND

Purpose:

The University of San Diego (USD) is requesting qualified suppliers to submit proposals for vertical transportation maintenance services to be used non-exclusively by the University departments on campus.

This document contains instructions and requirements, including the format in which the proposal must be submitted. As constructed, the Request for Proposal (RFP) will contain the means by which the University will qualify the respondent.

History:

The University of San Diego is a private Catholic institution of higher education, located on over 180 acres overlooking San Diego's Mission Bay. Chartered in 1949, USD enrolls just over 8105 students who may choose from more than 70 undergraduate and graduate degree programs. The student population has approximately 5,457 undergraduate, 1,686 graduate and 962 law students.

The USD campus supports six schools and one college, with over 875 faculty and over 2,000 administrative, staff and temporary employees. The majority of the University buildings are on the main campus with some residence halls and offices located off-site.

Instructions

Suppliers are reminded that the primary purpose of the proposal is to provide the University with the most efficient, convenient and cost effective service possible. Each proposal must clearly address all sections of this document and demonstrate the supplier's willingness to respond to the needs of USD faculty, staff and administrative personnel. The supplier shall provide evidence of their expertise, professional management capabilities and qualifications to act as a service provider to the University in all areas pertaining to the requested services and supplies.

SECTION II – EVALUATION PROCESS

Cost and service will be the primary consideration. No information relating to the results of the RFP process will be released.

The University may, at its sole discretion:

1. Reject any or all proposals.
2. Issue subsequent request for proposals.
3. Cancel the request for proposal.
4. Remedy technical errors in the request for proposal process.
5. Modify any requirements contained within the RFP and request revisions submitted from proposers determined to be within the competitive range.
6. Negotiate with any, all or none of the proposers.
7. Establish a short list of proposers eligible for interview after review of written proposals.
8. Select best and final offers from all, some or none of the proposers.
9. Accept the written proposal as an offer, without negotiation, and issue a notice to proceed

This RFP does not commit the University to negotiate or award a contract, nor does it obligate the University to pay for any cost incurred in the preparation and submission of proposal or in anticipation of a contract. The University reserves the right to contract with any of the suppliers responding to this RFP based solely upon its judgment of the qualifications and capabilities of the supplier.

No Obligation to Purchaser:

Neither the purchaser nor any agent on behalf of the purchaser will be obligated in any way by any supplier response to this RFP. The selection of the supplier and the accompanying award of a contract are based on evaluation criteria established by USD and described in the award criteria section. The selection is at the sole discretion of the University.

Award Criteria

USD will carefully evaluate all supplier proposals complying with the guidelines described in this RFP document and will make award based on best value. We will not make a decision based solely on cost.

Services will be evaluated on the following criteria:

- ◆ Compliance with the RFP specifications
- ◆ Price
- ◆ Supplier's experience in providing the required services
- ◆ Availability and reliability
- ◆ Customer service and support services
- ◆ Other criteria as the University deem to be prudent

USD will notify suppliers of rejected proposals in writing within 5 business days of award of contract.

Affirmative Action

In connection with the execution of this proposal, supplier shall not unlawfully discriminate against any employee or applicant for employment because of race, age, religion, color, sex, national origin, ancestry, physical disability, medical condition, or marital status. Proposer shall take affirmative action to ensure that applicants for employment and employees are free of such discrimination.

SECTION III – SCOPE OF SERVICES

DESCRIPTION OF WORK: Contractor shall supply trained, qualified, and technically-skilled journeymen directly employed and supervised by Contractor. All supervision, installed repair parts, consumable materials, equipment, mechanical and electronic tools, and each and every item of expense necessary for vertical transportation maintenance, including all preventative maintenance, repairs, parts, and trouble-call service, shall be hereinafter called the “Work.”

Work described herein shall be performed on the following equipment:

- a) Two (2) Geared Traction Passenger Elevators
- b) One (1) Geared Traction Service Elevator
- c) One (1) Hydraulic Freight Elevator
- d) Two (2) Hydraulic Service Elevators
- e) Thirty-Eight (38) Hydraulic Passenger Elevators
- f) Two (2) Traction Dumbwaiters
- g) One (1) Wheelchair Lift
- h) One (1) Vertical Lift

EXHIBITS: All Work shall be performed in strict accordance with the Attachments outlined under the “Attachments and Exhibits” section that has been incorporated into and made part of this agreement.

PREVENTATIVE MAINTENANCE: Contractor shall regularly and systematically examine, clean, lubricate, and adjust vertical transportation equipment including machine rooms, secondary’s, pits, and hoist ways.

All preventative maintenance and adjusting shall meet minimum standards established by Original Equipment Manufacturer (OEM) for vertical transportation. Contractor will not limit other servicing necessary to maintain this equipment in a clean, safe, and top operating condition.

REPAIR AND REPLACEMENT: Contractor shall repair or replace any worn and/or defective equipment including, but not limited to, the following:

TRACTION ELEVATORS:

- a) Machine Ring & Worm Gear, Thrust Bearings, Drive Sheave, Shaft Bearings, Brake Pulley, Brake Coil, Brake Contact, Linings, Component Parts
- b) AC and DC Motors, Generators, SCR Drives, VVVF Motor, VVVF Drives, Windings, Rotating Elements, Commutators, Brushes, Brush Holders, Bearings, Field Coils
- c) Controller, Selector and Dispatching Equipment, Relays, Solid-State Components, Resistors, Condensers, Transformers, Contacts, Leads, Dash-pots, Timing Devices, Computer Devices, Printed Circuit Boards, Steel Selector Tape, Traveling Cable, Mechanical or Electrical Operating Equipment
- d) Governor, Governor Sheave and Shaft Assembly, Bearings, Contacts, Governor Jaws, Governor Cable, Car Safeties
- e) Deflector or Secondary Sheave, Bearings, Car and Counterweight Buffers, Car and Counterweight Guide Rails, Top and Bottom Limit Switches, Governor Tension Sheave Assembly, Compensating Sheave Assembly, Counterweight and Counterweight Guide Shoes including Rollers or Slipper Shoes, Hoist Ropes, Governor Ropes, Compensating Ropes and Chains, Load Weighing Equipment, Car Frame, Car Safety Mechanism, Platform. Equalize Tension on Hoist way Ropes.
- f) Door Operator, Clutch Assemblies, Pick-up Rollers, Interlocks, Hoist way Door Hangers, Bottom Door Guides, Safety Edges, Door Detectors, Electric Eyes, Astragals, Auxiliary Door Closing Devices, Hatch Inductors, Vanes, Car and Hall Lanterns, Fixtures, Position Indicators, Access Switches, Inspection Stations
- g) Fixture Lamps, Emergency Lighting including Batteries, Gongs, Lanterns, Pushbuttons, Cab Exhaust Fans, Machine Room Monitors

HYDRAULIC ELEVATORS:

- a) Controller, Selector and Dispatching Equipment, Relays, Solid-State Components, Resistors, Condensers, Transformers, Contacts, Leads, Dash-pots, Timing Devices, Computer Devices, Printed Circuit Boards, Steel Selector Tape, Traveling Cable and other Mechanical or Electrical Operating Equipment and Emergency Battery Lowering Devices and Batteries
- b) Hydraulic pumping unit complete including, but not limited to, Pump Valves, Exposed Piping, Fittings/Couplings, Muffler, Belts, Oil Reservoir, Oil Heaters, Oil Cooling Devices
- c) Above-Ground Equipment including, but not limited to, Piping and Feed Lines, Fittings and Couplings, Pit Valves, Hydraulic Cylinder and Piston Assemblies Complete (if above ground), Piston, Packing and Packing Gland (if cylinder is below ground).
- d) Door Operator, Clutch Assemblies, Pick-up Rollers, Interlocks, Hoist way Door Hangers, Bottom Door Guides, Safety Edges, Door Detectors, Electric Eyes, Astragals, Auxiliary Door Closing Devices, Hatch Inductors, Vanes, Car and Hall Lanterns, Fixtures, Position Indicators, Access Switches, Inspection Stations.
- e) Car Buffers, Car Guide Rails, Top and Bottom Limit Switches, Load Weighing Equipment, Car Frame, Platform
- f) Fixture Lamps, Emergency Lighting including Batteries, Gongs, Lanterns, Pushbuttons, Pushbutton Assemblies, Machine Room Monitors
- g) Contractor is to provide all Hydraulic Fluid and Lubricants required to keep and maintain equipment functioning properly and as designed. Also include removal and code-compliant disposal of used oil.
- h) Should Flexible Feed Lines be utilized in piping system, they shall be tested and/or replaced as required and outlined in ANSI/ASME A17.1.

DUMBWAITERS, VERTICAL LIFTS, WHEELCHAIR LIFTS:

- a) Machine Ring & Worm Gear, Thrust Bearings, Drive Sheave, Shaft Bearings, Brake Pulley, Brake Coil, Brake Contact, Linings, Component Parts
- b) AC and DC Motors, SCR Drives, Motor Windings, Rotating Elements, Commutators, Brushes, Brush Holders, Bearings, Field Coils
- c) Pump Unit, Tank, Motor, Valve
- d) Controller, Selector and Dispatching Equipment, Relays, Solid-State Components, Resistors, Condensers, Transformers, Contacts, Leads, Dash-Pots, Timing Devices, Computer Devices, Printed Circuit Boards, Steel Selector Tape, Traveling Cable, Other Mechanical or Electrical Operating Equipment
- e) Deflector Sheave, Bearings, Buffers, Car and Counterweight Guide Rails, Top and Bottom Limit Switches, Counterweight and Counterweight Guide Shoes including Rollers or Slipper Shoes, Hoist Ropes, Car Frame, Platform
- f) Interlocks, Hoist way Doors, Door Tracks, Door Guides, Astragals, Hatch Inductors, Vanes, Car and Hall Lanterns, Fixtures, Position Indicators, Gates
- g) Fixture Lamps, Gongs, Lanterns, Pushbuttons, Pushbutton Assemblies

PARTS INVENTORY REQUIREMENTS: Contractor agrees to the following requirements and authorization of parts used in the Work:

Major Component Parts (Electrical):

- i. Motor and generator armatures are to be maintained in stock.
- ii. Motors, field coils, and armatures shall be rewound or repaired by qualified motor rewind shop. Contractor shall cause the repair to be done immediately.

Major Component Parts (Mechanical): If Contractor does not have machine gears, frames, sheaves, rails, and similar mechanical components in stock, Contractor must provide University of San Diego current information of sources for these items.

Special Electrical Parts: Contractor acknowledges that, if elevator control systems contain solid-state printed circuit modules, Contractor agrees to maintain in inventory, a sufficient amount of modules and component parts to replace and/or repair any of these units, should failure occur. Contractor warrants there shall not be any elevator down time in excess of that which is to be reasonably expected in the industry.

Job Material Inventory: Contractor will maintain a supply of contacts, coils, leads, generator brushes, printed circuit boards, door rollers, lubricants, wiping cloths, and other minor parts in each elevator machine room for the term of this Agreement.

Spare Parts Inventory: Contractor will maintain supply of vertical transportation spare replacement parts in Contractor's warehouse inventory or available from Contractor's manufacturing facilities. Inventory will include, but is not limited to, generator rotating elements, printed circuit boards, door operator motors, generator and motor brushes, controller switch contacts, selector switch contacts, solid-state components, selector tapes, door hangers, rollers, hoist way limit switches, etc.

Parts Replacement Policy: Contractor will not alter equipment parts and OEM design with other manufacturers' design unless OEM has discontinued item and parts are no longer available. Parts manufactured by companies other than OEM, but supplied to the OEM as part of their overall product, may be acceptable if part is of the same design and character. These proven suppliers may be recognized as equal so long as their product matches existing part and Contractor obtains University of San Diego written consent prior to installing such parts.

Cost of any alternate source, modification or addition of parts, or equipment purchased by Contractor pursuant to this Section shall be included in monthly contract price paid by University of San Diego to Contractor and shall not be an additional charge to University of San Diego.

MODIFICATION APPROVALS: Should Contractor request or wish to make any change, modification, or addition to existing vertical transportation equipment, Contractor must submit a written "Request to Modify" proposal to the University for approval. A Request to Modify must state reason why Contractor wishes to change a component. Complete information on new proposed component and a guarantee of responsibility by the Contractor for component change.

CODE TESTING REQUIRED: Contractor shall perform all State and ANSI-required testing and all other vertical transportation testing required by law and existing codes. These tests shall include, but are not limited to, the following:

Testing and Supervisory Inspections: Contractor shall conduct tests and supervisory inspections of all vertical transportation equipment as required by any current applicable safety codes for vertical transportation.

ANSI/ASME A17.1: Contractor shall conduct tests per code requirements:

- a) Fireman's Return Phase I and II (Monthly)
- b) Governor No-Load Tests
- c) Buffer Tests
- d) One-Year and Five-Year Safety Tests
- e) One-Year Pressure - Leak Test of Hydraulic Systems
- f) Five-Year Pressure - Leak and Load Test of Hydraulic Systems

Contractor shall notify the University, in writing, prior to conducting such tests. Contractor shall submit test results to the University.

Testing or service required by the Department of Industrial Relations, Division of Occupational Safety and Health shall be completed before the expiration of the Preliminary Order.

In addition to testing frequency required by State and ANSI Code, the University could require that each of these tests be performed at a frequency of no more than one (1) time per year except for Fireman’s Return Phase I and II.

UNIVERSITY RIGHT TO INSPECT AND REQUIRE WORK:

The University reserves the right to conduct inspections and tests to ascertain that requirements of this Agreement are being fulfilled.

Contractor will, upon receipt of a Maintenance Deficiencies Report, perform all required corrections without undue delays. All items should be completed promptly and in no event later than thirty (30) days of receipt of Maintenance Deficiencies Report. Maintenance Deficiencies Report will be those items considered to be in violation of this Agreement and/or OEM Standards.

PERFORMANCE REQUIREMENTS:

Contractor agrees to maintain the following minimum requirements of each piece of vertical transportation equipment as described per manufacturer’s original installation criteria.

Contractor shall maintain vertical transportation equipment to provide for safe, reliable and efficient operation. Operation of vertical transportation equipment shall be smooth and quiet, and free from excessive jarring, jerking, loping, and swaying.

In accomplishing the requirements listed below, Contractor shall maintain vertical transportation to provide for a comfortable ride with smooth acceleration, deceleration, start, and soft stop. Elevator door operation shall be quiet with smooth checking at extremes of travel.

Door Operators: Door performance is based upon thirty to forty-eight inch doors (30” – 48”). Should doors be wider than forty-eight inches (48”), add one (1) second to the values listed below.

Door Width	DOOR OPERATORS			
	SIDE OPEN SINGLE-SPEED		CENTER OPEN SINGLE-SPEED	
	Open (Seconds)	Close* (Seconds)	Open (Seconds)	Close* (Seconds)
30” – 34” Medium Speed	2.2	3.2	--	--
36” Medium Speed	2.5	3.5	--	--
42” High Speed	2.3	4.0	1.8	3.0
42” Medium Speed	3.0	4.0	2.0	3.0
48” High Speed	2.5	4.5	2.0	3.5
48” Medium Speed	3.5	4.5	2.2	3.5

Floor-to-Floor Performance Times: Measured by the time it takes an Elevator to start, travel one floor, level, and stop at that floor.

FLOOR-TO-FLOOR PERFORMANCE TIMES

Speed	Hydraulic (Seconds)	Geared Traction (Seconds)	Gearless Traction (Seconds)
100 FPM	11.0	--	--
125 FPM	10.5	--	--
150 FPM	10.0	--	--
200 FPM	--	10.0	--

Door Open Times: Measured from start of car door open until doors are in the fully open position.

*Door Close Times: Measured from start of door close until hoist way doors are fully closed. Contract times will be those shown or minimum permitted by Code.

Leveling: Accuracy of leveling shall be measured under all load conditions and consistent with OEM installation and Code requirements.

Variance from rated contract speed, regardless of load, shall not exceed ten percent (10%) for Traction Elevators and fifteen percent (15%) for Hydraulic Elevators.

TROUBLE CALL SERVICE:

Contractor shall provide 24-Hour, 7-Day per Week Trouble Call Service. After hours, weekends, and holidays, Contractor shall pay straight time portion and the University shall pay overtime portion of trouble calls.

Trouble Calls: In the event of failures, provide Trouble Call Service during normal working hours of the elevator trade at no additional cost to the University.

Maximum overtime travel charge is 1.0 hours.

CONTRACTOR RESPONSE TIME:

After and during regular working hours, on weekends and holidays, Contractor shall have a mechanic on Premises within two (2) hours of any trouble call request made by the University and within thirty (30) minutes for an entrapment.

Vertical Transportation Shutdowns:

Should any vertical transportation become inoperative, it shall be repaired as soon as possible and within twenty-four (24) hours of notification.

Breakdown of major components shall be completed and service restored as soon as possible and within seventy-two (72) hours.

Any elevator out of service longer than required in item 1 & 2 above, the cost of monthly maintenance for the unit shall be credited to the University on the next month's invoice.

Should Contractor fail to comply, the University may order Work done by another elevator company at Contractor's expense. The cost of such Work shall be credited to the University on the next month's invoice. Devices repaired or replaced by another elevator company shall become part of this Agreement and, as such, shall become Contractor's responsibility for the life of this Agreement.

MINIMUM MAN-HOURS AT PREMISES:

Contractor shall furnish a mechanic(s) to provide preventative maintenance service at Premises, for a minimum, 48 hour(s) per month as required in EXHIBIT A. It is understood that such minimum service hours do not limit labor required to maintain equipment in top running condition. Trouble Calls and repair labor are not considered service time.

Contractor's Supervisor will examine all equipment semi-annually and in accordance with this Agreement and all Exhibits attached thereof.

Notwithstanding anything to the contrary contained herein, Contractor shall continue to provide routine servicing and Trouble Call troubleshooting on a continuous basis, regardless of labor disputes, strikes, or other similar type interruptions of service as covered in this Agreement, unless building or a portion thereof has been evacuated or temporarily closed. During any interruption, Contractor shall not reduce service mechanic's time.

Failure to provide services required in this Agreement shall be cause for retention of monthly fees equal to the reduction of Contractor's services, and shall continue until full normal service is restored. Contractor may, at Contractor's option, choose to make up time lost at the conclusion of any period of interrupted service.

Contractor shall provide sufficient backup in times of staff shortages due to vacations, extended holidays, etc.

HOURS OF WORK:

Regular Working Hours. All preventative maintenance, repairs, routine adjusting, and service procedures will be performed during working hours (6:00 AM TO 6:00 PM) of regular working days of the elevator trade. Notification to the University must be made prior to removal of vertical transportation from normal service for maintenance, testing, and adjustments.

Reporting In/Out, Logs. All Contractor's personnel, whether servicing, performing trouble calls, or repairs, shall check in and out with the University on each visit to the Premises and log their activities.

Special Events Coverage. Provide elevator mechanic standby service during four (4) special events as designated by the University.

PERFORMANCE SCHEDULE AND SEQUENCE OF WORK:

Contractor shall commence maintenance on each piece of equipment described in this Agreement on effective Agreement date.

Contractor shall perform additional Work as requested from time to time as authorized by the University. The University will provide a description of Work to be performed. Contractor will provide an estimate of cost to perform Work. Contractor's authorization to commence Work shall be a signed written proposal.

Contractor shall submit timesheets, for validation by the University, covering chargeable time by Contractor's personnel on University Premises at the time of the Work performance.

REPORTS AND DOCUMENTATION:

Reports and Logs. Contractor will maintain trouble call, repair, preventative maintenance, fire service testing, and Contractor's Supervisor reports on a current basis, at all times throughout the term of this Agreement. These reports will be maintained in the elevator machine room in a conspicuous location.

In addition to the above requirements, Contractor shall provide all available electronic system maintenance records to the University on a monthly basis.

POLICIES FOR EMPLOYEES/AGENTS OF CONTRACTOR:

Contractor agrees that, at all times, Contractor personnel furnishing or performing any services, shall do so in a proper, workmanlike, and dignified manner and wearing uniforms which shall be neat, clean, well-pressed, and in good condition.

Contractor shall provide, at all times, adequate and expert managerial and administrative supervision for its personnel. Contractor agrees that all persons working for or on behalf of Contractor, whose duties bring them upon the Premises, shall comply with all applicable rules and regulations established by the University and shall comply with reasonable directions of the University and the University's Public Safety Officers.

Contractor shall comply with any requirements required by the University to obtain access identification passes.

WORK NOT CONSIDERED PART OF THIS SCOPE:

Installation of new attachments as may be recommended or directed by authority having jurisdiction or insurance companies.

In addition, the following items are not included in the scope of services (maintaining, refinishing, repairing, or replacement):

- a) Elevator Cab, Floor, Floor Covering, Exposed Sills, Handrails, Ceilings, etc.
- b) Hoist way Enclosures, Doors, Frames, Other Portions of Equipment Subject to Public Abuse
- c) Underground Hydraulic Cylinders, Casings, Hydraulic Piping
- d) Replacement of Light Bulbs, Fluorescent Tubes, and Associated Fixtures used for Cab or Machine Room Illumination
- e) Obsolete Equipment No Longer Available Through Normal or Alternate Supply Sources
- f) Equipment such as, but not limited to: Card Readers, Security, Intercom and Building Management systems are specifically excluded from coverage.
- g) Smoke Sensors and Heat Detectors

SECTION IV – PROPOSAL FORMAT AND CONTENT

A responsive proposal shall include the following information:

- a) An overview of the organization proposing to complete the work
- b) A statement of qualification outlining the organization's experience with similar work
- c) Three (3) projects that have been completed by the contractor that are similar in nature with contact information for each project.
- d) Three (3) professional references
- e) A completed cost proposal (see Attachment B)
- f) Any exceptions to the terms and condition of the Sample Agreement (See Attachment E)

Proposals must be submitted electronically as a single PDF attachment to the attention of Theresa Harris, Director, Procurement Services: theresaharris@sandiego.edu before the proposal due date. Proposals submitted after the deadline will not be accepted.

USD reserves the right to schedule onsite interviews with contractors selected as part of a short list for potential contract award. The date and time of the interview will be communicated to contractors selected for interview at least one week prior to the interview.

The USD Procurement Department is the issuing office for this RFP and all subsequent addenda. All questions regarding the RFP should be directed to the procurement department as indicated on the RFP Cover. The Procurement Department is the only office authorized to change or modify the RFP and any resulting contract.

ATTACHMENTS AND EXHIBITS

- 1) Schedule of Locations, Examination Hours, Frequency Chart – Attachment A
- 2) Cost Proposal – Attachment B
- 3) Supplier Registration Form – Attachment C
- 4) Conflict of Interest Statement – Attachment D
- 5) Sample Maintenance Agreement – Attachment E (list exceptions in response)

1	074691	COPLEY LIBRARY	PASSENGER	24 HOUR 858/279-8900	AMTECH/RELIABLE	2/2 IN-LINE
2	074692	COPLEY LIBRARY	DUMBWAITER	24 HOUR 858/279-8900	ATLAS	2/2 IN-LINE
3	074693	COPLEY LIBRARY	DUMBWAITER	24 HOUR 858/279-8900	ATLAS	2/2 IN-LINE
4	028973	HUGHES CENTER - PRESIDENT	PASSENGER	24 HOUR 858/279-8900	SD ELEVATOR	3/3 IN-LINE
5	108009	HUGHES CENTER	PASSENGER	24 HOUR 858/279-8900	OTIS	3/3 IN-LINE
6	032479	LEGAL RESEARCH CTR - NORTH	PASSENGER	24 HOUR 858/279-8900	OTIS	2/2 IN-LINE
7	093161	LEGAL RESEARCH CTR - SOUTH	PASSENGER	24 HOUR 858/279-8900	AMTECH/RELIABLE	6/6 IN-LINE
8	067104	LAW SCHOOL	PASSENGER	24 HOUR 858/279-8900	MONTGOMERY	3/3 IN-LINE
9	103286	LOMA/BOOKSTORE	PASSENGER	24 HOUR 858/279-8900	AMTECH/RELIABLE	2/2 IN-LINE
10	103288	LOMA/BOOKSTORE	PASSENGER	24 HOUR 858/279-8900	AMTECH/RELIABLE	4/4 IN-LINE
11	031069	MAHER - EAST	PASSENGER	24 HOUR 858/279-8900	OTIS	5/5 IN-LINE
12	031070	MAHER - WEST	PASSENGER	24 HOUR 858/279-8900	OTIS	5/5 IN-LINE
13	031071	MAHER - KITCHEN	PASSENGER	24 HOUR 858/279-8900	OTIS	2/2 IN-LINE
14	074706	MANCHESTER	PASSENGER	24 HOUR 858/279-8900	AMTECH/RELIABLE	2/2 IN-LINE
15	074758	OLIN	PASSENGER	24 HOUR 858/279-8900	AMTECH/RELIABLE	3/3 IN-LINE
16	113825	MISSION PARKING - NORTH	PASSENGER	24 HOUR 858/279-8900		5/5 IN-LINE
17	113811	MISSION PARKING - SOUTH	PASSENGER	24 HOUR 858/279-8900		5/5 IN-LINE
18	064144	SCHOOL OF NURSING	PASSENGER	24 HOUR 858/279-8900	MONTGOMERY	2/2 IN-LINE
19	062750	SERRA	PASSENGER	24 HOUR 858/279-8900	OTIS	3/3 IN-LINE
20	084716	UNIVERSITY CENTER	PASSENGER	24 HOUR 858/279-8900	MONTGOMERY	2/2 IN-LINE
21	084717	UNIVERSITY CENTER	FREIGHT	24 HOUR 858/279-8900	MONTGOMERY	2/2 IN-LINE
22	048960	SAP'S - SOUTH (BAHIA LOMA)	PASSENGER	24 HOUR 858/279-8900	US ELEVATOR	4/4 IN-LINE
23	048379	SAP'S - NORTH (BAHIA LOMA)	PASSENGER	24 HOUR 858/279-8900	US ELEVATOR	4/4 IN-LINE
24	118266	J.C.P.	PASSENGER	24 HOUR 858/279-8900	MONTGOMERY	4/4 IN-LINE
25	119432	KROC - SOUTH	PASSENGER	24 HOUR 858/279-8900	KONE	4/4 IN-LINE
26	119433	KROC - NORTH	PASSENGER	24 HOUR 858/279-8900	KONE	4/4 IN-LINE
27	119437	KROC - KITCHEN LIFT	DUMBWAITER	24 HOUR 858/279-8900		2/2 IN-LINE
28	072696	U.O.P. (ALCALA WEST)	PASSENGER	24 HOUR 858/279-8900	OLIVER & WILLIAMS	3/3 IN-LINE
29	119557	CASA DE LA PAZ	PASSENGER	24 HOUR 858/279-8900	KONE	2/2 IN-LINE
30	119855	MVA1 (1720)	PASSENGER	24 HOUR 858/279-8900	KONE	5/5 IN-LINE
31	119796	MVA2 (1714) - LEFT	PASSENGER	24 HOUR 858/279-8900	KONE	6/6 IN-LINE
32	119797	MVA2 (1714) - RIGHT	PASSENGER	24 HOUR 858/279-8900	KONE	6/6 IN-LINE
33	125318	ALUMNI CENTER	PASSENGER	24 HOUR 858/279-8900	OTIS	3/3 IN-LINE
34	125284	WEST PARKING STRUCTURE - NORTH (1)	PASSENGER	24 HOUR 858/279-8900	THYSSEN	6/6 IN-LINE
35	125366	WEST PARKING STRUCTURE - SOUTH (2)	PASSENGER	24 HOUR 858/279-8900	THYSSEN	6/6 IN-LINE
36	119983	SCIENCE/TECHNOLOGY - FREIGHT	PASSENGER	24 HOUR 858/279-8900	THYSSEN	5/5 IN-LINE
37	125127	SCIENCE/TECHNOLOGY - WEST	PASSENGER	24 HOUR 858/279-8900	THYSSEN	4/4 IN-LINE
38	125128	SCIENCE/TECHNOLOGY - EAST	PASSENGER	24 HOUR 858/279-8900	THYSSEN	4/4 IN-LINE
39	142917	SOLES (1) - EAST	PASSENGER	24 HOUR 858/279-8900	MITSUBISHI	3/3 IN-LINE
40	142918	SOLES (2) - WEST	PASSENGER	24 HOUR 858/279-8900	MITSUBISHI	3/3 IN-LINE
41	142894	SOLES (3) WHEELCHAIR LIFT	LIFT	24 HOUR 858/279-8900	PORCH LIFT	
42	142821	SAN BUENAVENTURA (1) - SOUTH	PASSENGER	24 HOUR 858/279-8900	THYSSEN/KRUPP	4/4 IN-LINE
43	142822	SAN BUENAVENTURA (2) - RIGHT	PASSENGER	24 HOUR 858/279-8900	THYSSEN/KRUPP	4/4 IN-LINE
44	142823	SAN BUENAVENTURA (3) - LEFT	PASSENGER	24 HOUR 858/279-8900	THYSSEN/KRUPP	4/4 IN-LINE
45	141026	CAFÉ FITNESS	PASSENGER	24 HOUR 858/279-8900	THYSSEN/KRUPP	3/3 IN-LINE
46	149665	STUDENT LIFE PAVILION	PASSENGER	24 HOUR 858/279-8900	MITSUBISHI	5/5 IN-LINE
47	158152	FOWLER PARK - #1 HOMEPLATE		24 HOUR 858/279-8900	MITSUBISHI	3/3 IN-LINE
48	158153	FOWLER PARK - #2 3 RD BASE		24 HOUR 858/279-8900	MITSUBISHI	3/3 IN-LINE
49	154475	FOWLER PARK - WHEELCHAIR LIFT		24 HOUR 858/279-8900		
50	165256	BINR	PASSENGER	24 HOUR 858/279-8900	MITSUBISHI	3/3 IN-LINE

ATTACHMENT B

RFP # 181001 – COST PROPOSAL

Base Period (July 2018 – June 2021) \$ _____
Option Year 1 (July 1, 2021 – June 30, 2022) \$ _____
Option Year 2 (July 1, 2022 – June 30, 2023) \$ _____

CONTRACTOR’S BILLING RATES: (Base Period)

A. Mechanic:

- 1. Straight Time: \$ _____
- 2. Time & One-Seventh: \$ _____
- 3. Double Time: \$ _____
- 4. Bonus Time Only: \$ _____

B. Team Hour:

- 1. Straight Time: \$ _____
- 2. Double Time: \$ _____

Labor Rate, Including Fringe:

Benefits Applicable: _____ Rate _____

Metal Products Index: _____ Rate _____

CONTRACTOR’S BILLING RATES: (Option Year 1)

C. Mechanic:

- 1. Straight Time: \$ _____

- 2. Time & One-Seventh: \$ _____
- 3. Double Time: \$ _____
- 4. Bonus Time Only: \$ _____

D. Team Hour:

- 1. Straight Time: \$ _____
- 2. Double Time: \$ _____

Labor Rate, Including Fringe:

Benefits Applicable: _____ Rate _____

Metal Products Index: _____ Rate _____

CONTRACTOR'S BILLING RATES: (Option Year 2)

E. Mechanic:

- 1. Straight Time: \$ _____
- 2. Time & One-Seventh: \$ _____
- 3. Double Time: \$ _____
- 4. Bonus Time Only: \$ _____

F. Team Hour:

- 1. Straight Time: \$ _____
- 2. Double Time: \$ _____

Labor Rate, Including Fringe:

Benefits Applicable: _____ Rate _____

Metal Products Index: _____ Rate _____

Contractor shall furnish a mechanic(s) to provide preventative maintenance services for a minimum of fifty (50) hours per month. The minimum service hours shall not limit the labor required to maintain equipment in top running conditions. Please refer to the Sample Agreement outlined in Exhibit E.

SUPPLIER INFORMATION / SUBSTITUTE W9

PURPOSE: Information contained in this form will be used by University of San Diego to prepare Information Returns (Form 1099 Misc. or 1042S) and for withholding on payments to CA nonresidents reported on form CA592. Prompt return of this fully completed form will prevent delays when processing payments. An IRS W-9 Form may NOT be substituted in lieu of this form.

<input type="checkbox"/> NEW - Oracle Supplier Number:	<input type="checkbox"/> CHANGE		
Section 1 – Name and Address			
<i>Name as shown on income tax return of: Individual, Business, or if a Sole Proprietor Business enter owner's Full Name (Last, First, MI): Doing Business as name (DBA) - Checks will be made to this person</i>			
Name:	Contact (if other than payee):		
Address (Street/City/State/Zip code):			
Remit to Address (if different than above):			
Telephone #:	Fax #:		
Email Address (required for ACH Payment):			
Section 2 – Supplier's Federal Tax Classification & Ownership Information			
<input type="checkbox"/> Individual/Sole Proprietor	<input type="checkbox"/> Partnership	<input type="checkbox"/> S - Corporation	<input type="checkbox"/> C - Corporation
<input type="checkbox"/> Medical Corporation	<input type="checkbox"/> Exempt Organization (Not for Profit)		<input type="checkbox"/> Estate or Trust
<input type="checkbox"/> Limited Liability Company:	<input type="checkbox"/> C= C corporation	<input type="checkbox"/> S=S corporation	<input type="checkbox"/> P= partnership
<i>(Check All Boxes that Apply)</i>			
<input type="checkbox"/> Minority Owned	<input type="checkbox"/> Small Business	<input type="checkbox"/> Service Disabled /Veteran Owned	<input type="checkbox"/> Veteran Owned <input type="checkbox"/> Women Owned
<input type="checkbox"/> African American	<input type="checkbox"/> Native American	<input type="checkbox"/> Asian	<input type="checkbox"/> Hispanic
<input type="checkbox"/> Other:			
Section 3 – Supplier's Taxpayer ID Number			
<i>Social Security Number (SSN) or Federal Employer Identification Number (FEIN) must be on file for ALL suppliers receiving payments from University of San Diego.</i>			
SSN or TIN:		EIN:	
Section 4 – ACH Information/Method of Payment - Complete bank information ONLY if you are selecting payment method of ACH			
Name on Acct:		Bank ID/Routing#:	Bank Account#:
Section 5 – Supplier's Residency Declaration for Tax Purposes			
<i>All payments made by the University are subject to Federal and/or California State Tax Withholding Status (see page 2)</i>			
<input type="checkbox"/> I am a U.S. Citizen or U.S. Person - a U.S. person defined for U.S. tax purposes is a Partnership, Corporation, Company, or Association created or organized in the United States or under the laws of the United States; An estate; or a domestic trust			
<input type="checkbox"/> I am a Permanent Resident Alien and I have a Green Card - (Attach a copy of documentation)			
<input type="checkbox"/> I am not a US Citizen/Business and I do not have a Permanent Resident Green Card. Payments may be subject to Federal tax withholding. Contact Payroll for a list of required documents to determine if you are eligible to work in the USA.			
<input type="checkbox"/> All Services related to this payment are performed OUTSIDE of the United States			
Section 6 – Supplier's State of California Residency Certification (you must check a box)			
<input type="checkbox"/> Product Purchase only - Not Applicable	<input type="checkbox"/> California Resident		
<input type="checkbox"/> California Nonresident (see Page 2, Section 5) Payments to CA nonresidents may be subject to 7% tax withholding. Attach a completed CA587 non- CA resident withholding allocation worksheet			
<input type="checkbox"/> I am not a US Citizen/Business and I do not have a Permanent Resident Green Card. Payments may be subject to state tax withholding at 12.3%. Contact Payroll for a list of required documents to determine if you are eligible to work in the USA.			
<input type="checkbox"/> Qualified to do business in CA or have a permanent place of business in CA Attach Withholding Exemption Certificate (CA590).			
Section 7 – Certifying Signature			
Under the law in the State of California, that the information provided on this document is true and correct. If my residency status should change, I will promptly inform you; the payee's TIN is correct. The payee is not subject to backup withholding (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. The payee is a U.S. person, and the payee is exempt from FATCA reporting.			
Exempt payee code (if any) _____ Exempt from FATCA reporting code (if any) _____			
Signature of U.S. Person: _____ Date: _____			

Requirements to Complete Supplier Information Form

A completed Supplier Information Form is required and will be kept on file.

Amounts paid to supplier's can be reported on Information Returns (1099 MISC, CA592 and 1042-S) are in accordance with the Internal Revenue Code and the California Revenue and Taxation Code.

Section 1

Enter the Payee's legal name/business name. Sole proprietorships must also include the owner's full name. An individual must list his/her full name. The home/ business address should be the address at which the payee chooses to receive correspondence. Do not enter payment address or lock box information here. Complete *remit* to address for payments.

Section 2

Check ONE box that corresponds to the payee entity type. Check ALL boxes that are applicable to the category of payment/ownership.

Section 3

The IRS requires that all parties entering into business transactions that may lead to payment(s) provide their Taxpayer Identification Number (TIN). The TIN is required to facilitate tax compliance enforcement activities and the preparation of Form 1099 and other information returns as required by the Internal Revenue Code Section 6109(a). Individuals and sole proprietorships shall provide Social Security Number (SSN) or Individual Tax Identification Number (ITIN). Only partnerships, estates, trusts, and corporations will enter their Federal Employer Identification Number (FEIN).

Section 4

Check the appropriate box. If ACH is selected, complete banking information. Do not leave any of these spaces blank.

Sections 5 & 6: Are you a California resident or nonresident?

A corporation will be defined as a "resident" if it has a permanent place of business in California or is qualified through the Secretary of State to do business in California.

A partnership is considered a resident partnership if it has a permanent place of business in California. An estate is a resident if the decedent was a California resident at time of death. A trust is a resident if at least one trustee is a California resident.

For individuals and sole proprietors, the term "resident" includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for a temporary or transitory purpose. Generally, an individual who comes to California for a purpose that will extend over a long or indefinite period will be considered a resident. However, an individual who comes to perform a particular contract of short duration will be considered a nonresident.

Payments to all nonresidents may be subject to CA withholding. Nonresident payees performing services in California or receiving rent, lease, or royalty payments from property (real or personal) located in California will have 7% of their total payments withheld for State income taxes. However, no withholding is required if total payments to the payee are \$1,500 or less for the calendar year.

Foreign Citizens and Foreign Businesses

Federal tax withholding regulations differ significantly from California tax withholding requirements. There are several additional forms required and they must be completed before a payment can be released. You will also need to provide a copy of your VISA, a copy of the picture page of your passport and a print out of their arrival and departure record from the U.S. Customs & Border Protection website.

Foreign Alien/Entity or Resident Alien

University of San Diego requires a W-8 Form for all foreign aliens/entities being paid for a service, copyrights, permissions and royalties performed in the United States to conform to IRS regulations. The IRS requires University of San Diego to obtain a signed and dated W-8 Form prior to issuing payment. There are four different types of W-8 Forms. The Foreign Alien/Entity will need to determine which type of form applies to them; they will need to fill out the appropriate form/ and they will need to return the form to University of San Diego. The links for the W-8 Forms are as follows:

<http://www.irs.gov/pub/irs-pdf/fw8exp.pdf> (Form W-8EXP) <http://www.irs.gov/pub/irs-pdf/iw8exp.pdf> (Instructions Form W-8EXP)

<http://www.irs.gov/pub/irs-pdf/fw8eci.pdf> (Form W-8ECI) <http://www.irs.gov/pub/irs-pdf/iw8eci.pdf> (Instructions Form W-8ECI)

<http://www.irs.gov/pub/irs-pdf/fw8ben.pdf> (Form W-8BEN) <http://www.irs.gov/pub/irs-pdf/iw8ben.pdf> (Instructions Form W-8BEN)

<http://www.irs.gov/pub/irs-pdf/fw8imy.pdf> (Form W-8IMY) <http://www.irs.gov/pub/irs-pdf/iw8imy.pdf> (Instructions Form W-8IMY)

Section 7

Provide the name, title, signature and telephone number of the beneficial owner of the payment requested or authorized agent of beneficial owner. Certification Instructions: You must cross out item 3 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, items 3 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 taxpayer identification number.