



ROANOKE COUNTY

FINANCE & MANAGEMENT SERVICES DEPARTMENT PURCHASING DIVISION

INVITATION FOR BID

IFB # 2023-057 **Water Source Heat Pump Units**

OPENING DATE: January 31, 2023
OPENING TIME: 2:00 P.M.

The Invitation to Bid and related documents may be obtained during normal business hours from the Purchasing Division, at the Roanoke County Administration Building, 5204 Bernard Drive, Suite 300F, Roanoke, VA 24018. This document may be viewed and/or downloaded from the County of Roanoke Purchasing Division's website at <https://www.roanokecountyva.gov/bids.aspx>. If you have any problems accessing the documents, you may contact Purchasing at (540) 772-2061.

**THIS PUBLIC BODY DOES NOT DISCRIMINATE
AGAINST FAITH-BASED ORGANIZATIONS**

DATE of IFB: January 20, 2023

INVITATION FOR BID (IFB)

IFB No. 2023-057

Issue Date: January 20, 2023

Title: Water Source Heat Pump Units

Issued By: **County of Roanoke**
Roanoke County Administration Building
Purchasing Division
5204 Bernard Drive, SW, Suite 300-F
Roanoke, VA 24018-0798
Phone (540) 772-2061
Email: KHoyt@roanokecountyva.gov

Sealed Bids will be received on or before **2:00 P.M., January 31, 2023** for furnishing the services and/or items described herein. The time of receipt shall be determined by the time clock stamp in the Purchasing office.

All questions must be submitted in writing before 5:00 p.m., **January 24, 2023**. If necessary, an addendum will be issued and posted to the County website on the Current Bids/RFP Requests tab at <https://www.roanokecountyva.gov/bids.aspx>.

If proposals are hand delivered or mailed, send directly to the Purchasing Division at the address listed above. If the Roanoke County Administration Building is closed for business at the time scheduled for the proposal opening, the sealed proposal will be accepted and opened on the next business day of the County, at the originally scheduled hour.

THIS PUBLIC BODY DOES NOT DISCRIMINATE AGAINST FAITH-BASED ORGANIZATIONS.

The County reserves the right to cancel this IFB and/or reject any or all proposals and to waive any informalities in any proposal.

This section is to be completed by the Offeror and this page must be returned with the bid. In compliance with this Invitation For Bid and subject to all terms and conditions imposed herein, which are hereby incorporated herein by reference, the undersigned offers and agrees to furnish the services and/or items requested in this solicitation if the undersigned is selected as the successful Bidder. No Bid may be withdrawn within a period of sixty (60) days after Bid opening except for clerical errors, as set forth in part (1) of Section 2.2-4330(B), Virginia Code, 1950, as amended. Notices of bid withdrawal must be submitted in writing to the Purchasing Division.

My signature certifies that the bid as submitted complies with all requirements specified in this Invitation for Bid ("IFB"). If this Bid is accepted by the County, to provide the services and/or items in accordance with this Invitation for Bid and to execute a Contract/Purchase Order substantially similar to the attached Contract/Purchase Order Terms and Conditions for such services and/or items. My signature also certifies that by submitting a bid in response to this IFB, the Bidder represents that in the preparation and submission of this bid, the Bidder did not, either directly or indirectly, enter into any combination or arrangement with any person or business entity, or enter into any agreement, participate in any collusion, or otherwise take any action in the restraining of free, competitive bidding in violation of the Sherman Act (15 U.S.C. Section 1) or Sections 59.1-9.1 through 59.1-9.17 or Sections 59.1-68.6 through 59.1-68.8 of the Code of Virginia.

I hereby certify that I am authorized to sign as a legal representative for the business entity submitting this bid.

Legal Name and Address of Firm:

Date:

By:

Name: _____ (Signature in Ink)

Zip: _____ Title: _____ (Please Print)
Phone: _____ FAX: _____
Email: _____ Business License# _____
Virginia State Corporation Commission Identification Number: _____

TABLE OF CONTENTS
INVITATION FOR BID NO. 2023-057
Water Source Heat Pump Units

Contents

SECTION 1. PURPOSE.....	6
SECTION 2. BACKGROUND	6
SECTION 3. SERVICES AND/OR ITEMS REQUIRED	6
SECTION 4. REQUIRED QUALIFICATIONS FOR BIDDERS	7
SECTION 5. TERM OF CONTRACT OR TIME OF PERFORMANCE OR NOT USED.	7
SECTION 6. PAYMENT FOR SERVICES	8
SECTION 7. GENERAL INSTRUCTIONS TO BIDDERS	8
SECTION 8. MISCELLANEOUS	13
SECTION 9. EVALUATION FOR LOWEST RESPONSIVE AND RESPONSIBLE BIDDER.....	14
SECTION 10. CONTRACTOR'S AND SUBCONTRACTOR'S INSURANCE.....	15
SECTION 11. NEGOTIATIONS WITH LOWEST RESPONSIVE AND RESPONSIBLE BIDDER	15
SECTION 12. BID AWARD	15
SECTION 13. FAITH BASED ORGANIZATIONS	15
SECTION 14. HOLD HARMLESS AND INDEMNITY	15
SECTION 15. PROTESTS	16
SECTION 16. COOPERATIVE PROCUREMENT	16
SECTION 17. INFORMATION ON CONTRACT/PURCHASE ORDER TO BE AWARDED	16

ATTACHMENT A: BID FORM/SPECIFICATIONS	18
ATTACHMENT B: Virginia State Corporation Commission (SCC) Registration Information	20
ATTACHMENT C: NOTICE OF PROPRIETARY INFORMATION FORM.....	21
ATTACHMENT D: PURCHASE ORDER TERMS AND CONDITIONS	22

COUNTY OF ROANOKE, VIRGINIA
INVITATION FOR BID NO. 2023-057
Water Source Heat Pump Units

SECTION 1. PURPOSE

The purpose of this Invitation for Bid (IFB) is the procurement of a total of eighty-two (82) self-contained water source heat pump units, for use by Roanoke County Public Schools. 46 units will be used at W.E. Cundiff Elementary School; 36 units will be used at Fort Lewis Elementary School.

The County of Roanoke invites any qualified Bidder to respond to this IFB by submitting a Bid for such work, service, and/or items consistent with the terms and conditions herein set forth.

The County will review each bid and may elect to issue separate awards to the lowest responsive and responsible Bidder(s) for such goods/services. Bidders may submit bids for one or both locations. Award will be based on the total cost of units for each location.

SECTION 2. BACKGROUND

Not used.

SECTION 3. SERVICES AND/OR ITEMS REQUIRED

A description and/or listing of the services and/or items that the Successful Bidder (the term "Successful Bidder" includes all Bidders to whom an award may be made) will be required to provide to the County under this IFB are those that are set forth below and/or referred to in any way in the sample contract, any terms and conditions, and/or any attachments referred to in this IFB. Each Bidder should carefully read and review all such documents.

The following are the services and/or items that the Successful Bidder shall provide to the County of Roanoke:

A. Heat pump units with the following specifications:

1. It is the intent of RCPS to purchase a total of eighty-one (82) units
2. Units must be self-contained water source heat pump units.
3. Bidders shall provide models and quantities as shown on Attachment A: Bid Form.
4. Bidder's proposed units must meet or exceed the specifications and performance of existing units to be replaced.
5. All units shall be shipped to the RCPS Warehouse at 5924 Cove Road, Roanoke VA 24019.

B. Data on existing unit types to be replaced is provided as follows:

W.E. Cundiff Elementary: 46 Carrier units

Carrier Model/Serial No.	Voltage	Quantity
50QXH048---601	460	4
50QXH018---411	265	3
50QXV036---621	460	4

50QXV048R---611	460	31
50QXV030R---421	460	1
50PCV036RCC6ACC1	460	1
HCV018B8C30CLT	265	1
HBH024A8C30CRS	265	1

Fort Lewis Elementary: 36 McQuay units

McQuay Model/Serial No.	Connection	Quantity
WMH019CMGR	RIGHT	5
WMH019CXGR	RIGHT	5
WMH019CMGL	LEFT	4
WMH019CXGL	LEFT	5
WMH007CXGL	LEFT	2
WMH007CXGR	RIGHT	2
WMH012CXGL	LEFT	2
WMH009CXGL	LEFT	1
WMH015CXGR	RIGHT	1
CCH042CMGS	RIGHT	3
CCH060CMGS	LEFT	1
CCH090CMFS	RIGHT	3
CCH036CMGS	RIGHT	1
LWP07DMD02	RIGHT	1

SECTION 4. REQUIRED QUALIFICATIONS FOR BIDDERS

Not used.

SECTION 5. TERM OF CONTRACT OR TIME OF PERFORMANCE OR NOT USED

- A. The Successful Bidder shall start the performance of any resultant Contract/Purchase Order as fixed by a notice to proceed given by the County to the Successful Bidder and fully and completely deliver the items within 180 consecutive calendar days after such date, all in accordance with the specifications of this IFB.
- A. The time of performance for any resultant Purchase Order is as follows: 180 calendar days.
- C. All terms and conditions shall remain in force for the term of the Contract/Purchase Order and for any renewal period unless modified by mutual agreement of both parties. Prices shall not be increased during the initial term of the Contract. Prices for any renewal periods will be subject to the mutual agreement of both parties.

SECTION 6. PAYMENT FOR SERVICES

Payment(s) to the Successful Bidder shall be made in accordance with the provisions of the resultant Contract or Purchase Order, subject to final approval by the County.

SECTION 7. GENERAL INSTRUCTIONS TO BIDDERS

- A. Bids, to be considered, must be received by the County of Roanoke Purchasing Division, at the Roanoke County Administration Building, 5204 Bernard Drive, Suite 300F, Roanoke, VA 24018, at or before 2:00 p.m., local time, on January 31, 2023, at which time all Bids received will be publicly opened and read. **Bids received after 2:00 p.m. will NOT be accepted or considered.** The time of receipt shall be determined by the time clock stamp in the Purchasing Office, or if it is not working, such time shall be determined by the Purchasing official who is to open the bids.

Each Bid, **one (1) original, marked as such** and **one (1) copy, marked as such**, must be appropriately signed by an authorized representative of the Offeror, and must be submitted in a **SEALED** envelope or package. A removable media storage device containing two (2) digital copies of the proposal, one as submitted, and one **redacted to remove all confidential and proprietary material**, must be included in the proposal packet. The notation “**RCPS HEAT PUMP UNITS**”, **IFB No. 2023-057**, and the specified opening time and date must be clearly marked on the front of that sealed envelope or package.

FAXED OR E-MAILED BIDS ARE NOT ACCEPTABLE.

The Invitation for Bid and related documents may be obtained during normal business hours from the Purchasing Division, at the Roanoke County Administration Building, 5204 Bernard Drive, Suite 300F, Roanoke, VA 24018. This document may be viewed and/or downloaded from the County of Roanoke Purchasing Division's website at <https://www.roanokecountyva.gov/bids.aspx>.

If you have any problems accessing the documents, you may contact Purchasing at (540) 772-2061.

If proposals are hand delivered or mailed, send directly to the Purchasing Division at the address listed above. If the Roanoke County Administration Building is closed for business at the time scheduled for the Bid opening, the sealed bid will be accepted and opened on the next business day of the County, at the originally scheduled hour.

All questions must be submitted *in writing* before 5:00 P.M. on January 24, 2023. If necessary, an addendum will be issued and posted to the County website on the Current Bids/RFP Requests tab at <https://www.roanokecountyva.gov/bids.aspx>.

- B. If you download this IFB from the County website and intend to submit a proposal, you should notify Purchasing that you have done so. However, each Bidder is solely responsible for ensuring that such Bidder has the current, complete version of the IFB documents, including any addenda, before submitting a bid. Receipt by the bidder of

such addendum should be acknowledged on the Bid Form and/or addendum. The County Purchasing Division or its designee will issue Addenda that will be posted to the County website on the Current Bid Opportunities tab at <https://www.roanokecountyva.gov/bids.aspx>.

C. **IMPORTANT NOTICE - ADDENDUMS AND NOTICES OF AWARD**

Vendors may visit <http://roanokecountyva.gov/list.aspx> to sign up to receive emails or text message notices about bids, proposals, addendums, bid tabulation and awards. Vendors can sign up to receive notification in selected commodity/service categories. It is the vendor's responsibility to keep information current in the system in order to receive the notifications. The sign up only requires an email address and/or a cell phone number for receiving text messages (if your phone is capable) and your choice of categories.

Although '**Notify Me**' will be the only way to receive automatic notification, all BIDS/RFP Information will continue to be posted on our website, and can be picked up at the Purchasing Division, 5204 Bernard Drive, Suite 300F, Roanoke, VA 24018. Phone # (540) 772-2061.

The County is not responsible for any IFB obtained from any source other than the County. Contact Kate Hoyt, by phone at 540-283-8149, or by email at KHoyt@roanokecountyva.gov.

- D. Payment terms and delivery date(s) must be shown on the submitted Bid, if applicable.
- E. All Bids are to be submitted in accordance with all terms, conditions, rules, regulations, requirements and specifications identified in and by this IFB.
- F. Bids are to be on the Form as provided with OR as otherwise specified in this IFB. If a Bid Form is provided, **no changes are to be made to the Bid Form**. Any changes to Bid amounts must be initialed.
- G. All Bids shall be signed by a person on behalf of the responding Bidder who is appropriately authorized to do so. The printed name of that authorized person should be shown as well. Any Bid submitted should be in the complete legal name of the Bidder responding. No Bid will be considered from any Bidder not properly licensed as may be required by law.
- H. Except in cases of emergency, all bids for construction contracts shall be accompanied by a bid bond from a surety company selected by the bidder, which is legally authorized to do business in Virginia.
 - (1) A bid, payment or performance bond for contracts for goods or services other than construction may be required if provided in the Invitation for Bid.
 - (2) The amount of the bid bond shall not exceed five percent (5%) of the total amount of the bid.
 - (3) In lieu of a bid bond, a bidder may furnish a certified check or cash escrow in the face amount required for the bond.
 - (4) Upon award of any public construction contract exceeding \$100,000 awarded to any prime contractor, such contractor shall furnish:
 - i. Performance bond in the sum of the contract amount.

- ii. Payment bond in the sum of the contract amount.
- (5) Performance and/or payment bonds may be required for construction contracts below \$100,000 at the discretion of the County.
- (6) In cases of emergency performance bonds/payment bonds are required within ten (10) calendar days of notice to proceed or project commencement.
- I. Bids that have been appropriately opened cannot be changed, adjusted, corrected or modified in any way other than complete withdrawal. The County's procedures for withdrawal of bids (whether construction or other than construction) is that set forth in Code of Virginia, §2.2-4330(A)&(B)(1), which allows withdrawal of a Bid due to an error such as an unintentional arithmetic error or an unintentional omission of a quantity of work, labor or material made directly in the compilation of a Bid, which unintentional arithmetic error or unintentional omission can be clearly shown by objective evidence drawn from inspection of original work papers, documents and materials used in the preparation of the Bid. Withdrawal must be requested within two days of the Bid opening by delivering to the County original work papers, documents, and materials used in preparation of the Bid.
- J. All Bids, appropriately received, will be evaluated by considering the requirements set forth in the IFB, the quality, workmanship, economy of operation, suitability for intended purpose, delivery, payment terms and price of product or service being requested in this Bid.
- K. Bids are to be submitted on the type, brand, make, and/or kind of product and/or service requested or its approved equal, to be solely determined by the County, unless otherwise specified. Should a Bid be for a product and/or service as an equal, the name, make, model and type of that which is being Bid must be clearly stated. The Bid must also be accompanied by descriptive literature of the product or service Bid to allow for evaluation. Failure to provide this information may result in the Bid being considered non-responsive and may not be considered.

It is not the intent of the specifications to be proprietary, nor to exclude any manufacturer or dealer. Deviations will be given consideration if they are considered to be suitable and acceptable for comparison. Any deviations must be submitted, in writing, with your bid. Deviations discovered after bid award or material receipt, not stated in your bid, shall be grounds for disqualification and nullification of order. It is the responsibility of the Offeror to prove that the deviation is equal to the product/service specified. The County of Roanoke will make the final determination as to whether the product is equivalent.

- L. If an award is made for the item(s) and/or services requested, a notice of award will be made which will be posted for public review on the County of Roanoke Purchasing Division's website under Current Bid Opportunities at <https://www.roanokecountyva.gov/bids.aspx> or you may contact Purchasing directly at (540) 772-2061 to request a copy of the award notification.

Upon completion of the Purchase Order, payment will be made only to the Successful Bidder at the address as shown on the Purchase Order. If the remittance address is other than the address on the Bid, it must be clearly noted and explained in the Bid. Purchase Order(s) will be paid only when the items and/or services have been supplied to and approved by the County.

- M. All items, identified in this IFB, are to be quoted and provided **F.O.B. DESTINATION-INSIDE DELIVERY**, unless otherwise stated in this IFB. All furniture items, if any, are to be put together and set in place.
- N. The County reserves the right to cancel this IFB or reject any or all Bids, to waive any informalities in any Bid and to purchase any whole or part of the items and/ or services listed in the IFB.
- O. Each Bidder is to notify in writing the Purchasing Division if any of Bidder's owners, officers, employees, or agents, or their immediate family members, is currently or has been in the past year, an employee of the County of Roanoke or has any responsibility or authority with the County that might affect the procurement transaction or any claim resulting therefrom. If so, please provide the Purchasing Division with the complete name and address of each such person and their connection to the County of Roanoke. Each Bidder is advised that the Ethics in Public Contracting and Conflicts of Interests Act of the Code of Virginia, as set forth in this IFB, apply to this IFB. Such information should be provided in writing before the Bid opening date or may also be provided with the Bid response.
- P. **The attention of each Bidder is directed to VA Code Sections 54.1-1100 et seq. which requires certain licenses for contractors, tradesmen and others. Each Bidder is required to determine which license, if any, it is required to have under such sections. Each Bidder shall so state on the Bid Form, or in its response, if no Bid Form is provided, whether it has a VA license under such sections and, if so, the type of license and/or license number. Failure to include this information may result in the Bid being rejected as non-responsive.**
- Q. **Bid Submittals shall include:**
1. **Pages 2-3, Invitation for Bid** (signed)
 2. **Attachment A: Bid Form** (unit prices shall include all labor, material, delivery costs, overhead and profit.)
 3. **Required Attachments: B, C.**
 4. **Signed copies of any Addenda issued**

Failure to do so may result in the Bid being determined as non-responsive.

Questions or concerns may be addressed by contacting Kate Hoyt by phone at 540-283-8149, or by email at KHoyt@roanokecountyva.gov.

- R. Ethics in Public Contracting. The provisions, requirements, and prohibitions as contained in Sections 2.2-4367 through 2.2-4377, of the Virginia Code, pertaining to bidders, offerors, contractors, and subcontractors are applicable to this IFB.
- S. Conflict of Interests Act. The provisions, requirements, and prohibitions as contained in Sections 2.2-3100, et seq., of the Virginia Code are applicable to this IFB.
- T. The procurement provisions of the Virginia Public Procurement Act as well as the County Procurement Manual, apply to this RFP, unless specifically modified herein. The County's Procurement Manual can be reviewed on the County's electronic procurement website.

- U. The County may request clarification from any of the Bidders after review of the Bids received.
- V. The County is not liable for any costs incurred by any Bidder in connection with this IFB or any response by any Bidder to this IFB. The expenses incurred by a Bidder in the preparation, submission, and presentation of the Bid are the sole responsibility of the Bidder and may not be charged to the County.
- W. General and/or technical questions regarding the Scope of Services and/or items required, or procurement questions under this IFB may be directed *in writing* to Kate Hoyt, Buyer, by email at KHoyt@roanokecountyva.gov.
- X. Each Bidder is required to state if it has ever been debarred, fined, had a contract terminated, or found not be a responsible bidder or Offer or by any federal, state, or local government and/or private entity. If so, please give the details of each such matter and include this information with Bidder's response.
- Y. **Data on Convictions for Certain Crimes and Child Abuse and Neglect Certification of Contractor:** The Consultant certifies that none of the persons who will provide services requiring direct contact with students on school property during school hours or during school-sponsored activities has been convicted of any of the following felony or misdemeanor offenses: felony sex or violence offenses, other felony offenses or misdemeanor sex offenses within the past ten years.

The Consultant further understands and acknowledges (1) that if he makes a materially false statement regarding any of the above offenses, he will be guilty of a Class 1 misdemeanor and may forfeit profits derived from the contract. Further, the Consultant understands and acknowledges that before any person is permitted to provide such services subsequent to this certification, he must complete a new certification regarding such person in a form satisfactory to Roanoke County and the Roanoke County School Board. **Data and Convictions information will be requested before the County of Roanoke/Schools enters into a contract when required.**

- Z. Each Bidder who is a stock or Nonstock Corporation, Limited Liability Company, business trust, or a limited partnership or other business entity shall be authorized to transact business in the Commonwealth of Virginia as a domestic or foreign business entity if required by law. Each such Bidder shall include in its bid response the Identification Number issued to it by the Virginia State Corporation Commission (SCC) and should list its business entity name as it is listed with the SCC. Any Bidder that is not required to be authorized to transact business in the Commonwealth as a domestic or foreign business entity as required by law shall include in its bid response a statement describing why the Bidder is not required to be so authorized. (See Va. Code Section 2.2-4311.2).
- AA. Unless participating in a pending solicitation, vendors/prospective vendors may visit County departments without advance approval of the Purchasing Division to make sales calls, drop off literature, or conduct demonstrations. Advance appointments must be confirmed with the Director or their designee for the department to be visited.

Direct contact with any County employee without the permission of the Purchasing Division, on the subject of this solicitation, is strictly forbidden.

During an active solicitation all communications (email, phone, text, letter) must be conducted through the Purchasing Division. Purchasing staff will coordinate responses to any inquiries, as necessary. *If any vendor involved in a pending solicitation or bid violates this communication protocol, any submittals from the vendor may be rejected/disqualified at the discretion of the Purchasing Division.*

SECTION 8. MISCELLANEOUS

- A. Ownership of all data, materials, and documentation originated and prepared for the County pursuant to the IFB shall belong exclusively to the County and be subject to public inspection in accordance with the *Virginia Freedom of Information Act*. The trade secrets or proprietary information submitted by the Bidder shall not be subject to public disclosure under the *Freedom of Information Act*, unless otherwise required by law or a court. **However, the Bidder must invoke the protection of Section 2.2-4342(F) of the Code of Virginia, in writing, either before or at the time the data or other material is submitted.** The written notice must SPECIFICALLY identify the data or materials to be protected and state the reason why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices, and/or total proposal prices as proprietary, or trade secrets, is NOT ACCEPTABLE and may result in REJECTION of the Bid.
- B. All Bidders shall be solely responsible for making sure that they have the most current and complete version of this IFB and all addenda that may have been issued for this IFB and that such Bidder has examined all such documents and data. Any interpretation, correction, or change of the IFB will be made by an addendum. Interpretations, corrections or changes of this IFB made in any other manner will not be binding and Bidders must not rely upon such interpretations, corrections, or changes. The County Purchasing Division or its designee will issue Addenda that will be posted to the County website on the Current Bid Opportunities tab at <https://www.roanokecountyva.gov/bids.aspx>.
- C. No Bidder shall confer on any public employee having official responsibility for a purchasing transaction any payment, loan, subscription, advance, deposit or money, service, or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value is exchanged.
- D. The County may make investigations to determine the ability of the Bidder to perform the work and/or provide the services and/or items as described in this IFB. The County of Roanoke reserves the right to reject any Bid if the Bidder fails to satisfy the County of Roanoke that it is qualified to carry out the obligations and requirements requested in this IFB.
- E. The Successful Bidder must comply with the nondiscrimination provisions of Virginia Code Section 2.2-4311, which are incorporated herein by reference.
- F. The Successful Bidder must comply with the drug-free workplace provisions of Virginia Code Section 2.2-4312, which are incorporated herein by reference.
- G. It is the policy of the County of Roanoke to maximize participation whenever possible by minority and women owned business enterprises in all aspects of

County contracting opportunities.

- H. The Successful Bidder shall comply with all applicable County, State, and Federal laws, codes, provisions, and regulations. The successful Bidder shall not during the performance of any resultant contract knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.
- I. Providers of any outside services and/or items shall be subject to the same conditions and requirements as the Successful Bidder in regards to law, code, or regulation compliance. The County reserves the right of approval for any subcontract work, including the costs thereof.

SECTION 9. EVALUATION FOR LOWEST RESPONSIVE AND RESPONSIBLE BIDDER

To determine the lowest responsive and responsible Bidder with respect to this Bid, the following factors, among such others as will protect and preserve the interest of the County may be considered:

- A. Unit prices, and total extended Bid price, as set forth on the Bid Form;
- B. The specified terms and discounts, if any, of the Bid;
- C. The ability, capacity and skill of the Bidder to perform the Contract and/or provide the services and/or items required;
- D. Whether the Bidder can perform the Contract and/or perform the services and/or provide the items promptly, or within the time specified, without delay or interference;
- E. The character, integrity, reputation, judgment, experience and efficiency of the Bidder;
- F. The quality of performance on previous contracts or services;
- G. The previous and existing compliance by the Bidder with laws and ordinances relating to other contracts, purchase orders, items and/or services provided by Bidder in other matters;
- H. The equipment and facilities available to the Bidder to perform the Contract and/or provide the services and/or items requested in the IFB;
- I. The sufficiency of the financial resources and ability of the Bidder to perform the Contract and/or provide the services and/or items requested in the IFB;
- J. The quality, availability, and adaptability of the supplies, materials, equipment and/or services the Bidder can provide for the particular use and/or work requested in the IFB; and
- K. The ability of the Bidder to provide future maintenance, parts, and service for the items requested in the IFB.

SECTION 10. CONTRACTOR'S AND SUBCONTRACTOR'S INSURANCE

Successful Bidder, and any of its subcontractors, shall, at its sole expense, obtain and maintain during the life of the resulting Purchase Order the insurance policies and/or bonds required. Any required insurance policies and/or bonds shall be effective prior to the beginning of any work or other performance by Successful Bidder, or any of its subcontractors, under any resultant Purchase Order. All such insurance shall be primary and noncontributory to any insurance or self-insurance the County may have. The policies and coverages required are those as may be referred to in the terms and conditions attached to this IFB, but shall include workers' compensation coverage regardless of the number of employees, unless otherwise approved by the County's Risk Manager.

SECTION 11. NEGOTIATIONS WITH LOWEST RESPONSIVE AND RESPONSIBLE BIDDER

If the bid by the lowest responsive and responsible bidder exceeds available funds, the County reserves the right to negotiate with the apparent lowest responsible bidder pursuant to County Code Chapter 17 (Ord. No. 3350, S2-30,12-14-82). State Code 2.2.4318. The conditions and procedures under which such negotiation may be undertaken are that the appropriate County officials shall determine that the lowest responsive and responsible bid exceeds available funds and notify such bidder in writing of its desire to negotiate. Thereafter, negotiations with the apparent low bidder may be held to obtain a Contract within available funds involving discussions of reduction of quantity, quality, or other cost saving mechanisms. Any such negotiated Contract shall be subject to final approval of the County, in the sole discretion of the County.

SECTION 12. BID AWARD

If an award of a Purchase Order is made, it will be awarded to the lowest responsive and responsible bidder(s). If an award of a contract is made, notification of such award will be posted for public review on the County of Roanoke Purchasing Division's website under Current Bid Opportunities at <https://www.roanokecountyva.gov/bids.aspx> or you may contact Purchasing directly at (540) 772-2061 to request a copy of the award notification.

SECTION 13. FAITH BASED ORGANIZATIONS

Pursuant to Virginia Code Section 2.2-4343.1, be advised that the County does not discriminate against faith-based organizations.

SECTION 14. HOLD HARMLESS AND INDEMNITY

Successful Bidder shall indemnify and hold harmless the County and its officers, agents, and employees against any and all liability, losses, damages, claims, causes of action, suits of any nature, costs, and expenses, including reasonable attorney's fees, resulting from or arising out of

Successful Bidder's or its employees, agents, or subcontractors actions, activities, or omissions, negligent or otherwise, on or near County's property or arising in any way out of or resulting from any of the work or items to be provided under the Purchase Order, and this includes, without limitation, any fines or penalties, violations of federal, state, or local laws or regulations, personal injury, wrongful death, or property damage claims or suits. Successful Bidder agrees to and shall protect, indemnify, and hold harmless all the parties referred to above from any and all demands for fees, claims, suits, actions, causes of action, settlement or judgments based on the alleged or actual infringement or violation of any copyright, trademark, patent, invention, article, arrangement, or other apparatus that may be used in the performance of the Purchase Order.

SECTION 15. PROTESTS

Any Bidder who wishes to protest or object to any award made or other decisions Pursuant to this IFB may do so only in accordance with the provisions of Sections 2.2-4357, 4358, 4359, 4360, 4363, and 4364 of the Code of Virginia, and only if such is provided for in such Code section. Any such protest or objection must be in writing signed by a representative of the entity making the protest or objection and contain the information required by the applicable Code Sections set forth above. Such writing must be delivered to the County Manager within the required time period.

SECTION 16. COOPERATIVE PROCUREMENT

The procurement of goods and/or services provided for in this procurement is being conducted in accordance with Virginia Code Section 2.2-4304 and on behalf of other public bodies in Virginia. Unless specifically prohibited by the Successful Bidder, any resultant contract may be used by other public bodies in Virginia as allowed by Section 2.2-4304. The Successful Bidder shall deal directly with each public agency or body seeking to obtain any goods and/or services pursuant to this procurement or from this procurement and in accordance with Virginia Code Section 2.2-4304. The County of Roanoke shall not be responsible or liable for any costs, expenses, or any other matters of any type to either the Bidder or the public agency or body seeking to obtain any goods and/or services pursuant to this cooperative procurement provision.

SECTION 17. INFORMATION ON CONTRACT/PURCHASE ORDER TO BE AWARDED

The **Purchase Order Terms and Conditions** marked as Attachment D to IFB No. 2023-057 contains Terms and Conditions that the County plans to include in any Purchase Order that may be awarded, but such Terms and Conditions may be added to, deleted, or modified as may be agreed to between the County and the Successful Bidder. However, if a Bidder has any objections to any of the Terms or Conditions set forth in the such Attachment or any changes or additions thereto that the Bidder wants to discuss before submitting a bid, the Bidder should set forth such objections, changes, or additions in written correspondence to the Purchasing Division at least five (5) days before the bid opening date for this IFB. Otherwise, submission of a bid by a Bidder will obligate such Bidder, if it is the Successful Bidder, to enter into a Purchase Order containing the same or substantially similar Terms and Conditions as contained in such Attachment, and to comply with such Terms and Conditions. Also, such Terms and Conditions, together with the

requirements of this IFB, shall be deemed to be a part of any resultant Purchase Order that may be issued by the County to the Successful Bidder.

END.

IFB # 2023-057
ATTACHMENT A: BID FORM/SPECIFICATIONS

County of Roanoke
Purchasing Division
5204 Bernard Drive, SW, Suite 300-F
Roanoke, VA 24018-0798

The County/RCPS reserves the right to add, delete, or adjust quantities as deemed necessary by the County.

Bids containing any conditions, omissions, unexplained erasures, alterations or items not called for in the bid, or irregularities of any kind, may be rejected by the County as being nonresponsive. No changes are to be made to the Bid Form. Any changes to a Bid Amount must be initialed by the person signing the Bid Form.

I/We hereby propose to furnish and provide self-contained water source heat pump units, in accordance with the enclosed general terms, conditions and specifications contained in IFB No. 2023-057. The Bid Form must be completed in blue or black ink. Discrepancies in the multiplication of units of work and the unit prices will be resolved in favor of the correct multiplication of the unit prices. Discrepancies between the indicated sum of any column of figures and the correct sum thereof will be resolved in favor of the correct sum. My/Our prices are as follows:

PRICES QUOTED SHALL BE FOB DESTINATION. Freight charges shall be included in the bid price.

W.E. Cundiff Elementary

Current Model (Carrier)	Voltage	Unit Price	Qty	Total Price	Proposed Model No.
50QXH048---601	460		4		
50QXH018---411	265		3		
50QXV036---621	460		4		
50QXV048R---611	460		31		
50QXV030R---421	460		1		
50PCV036RCC6ACC1	460		1		
HCV018B8C30CLT	265		1		
HBH024A8C30CRS	265		1		
Total Price:			46		

Fort Lewis Elementary

Current Model (McQuay)	Connection	Unit Price	Qty	Total Price	Proposed Model No.
WMH019CMGR	RIGHT		5		
WMH019CXGR	RIGHT		5		

WMH019CMGL	LEFT		4		
WMH019CXGL	LEFT		5		
WMH007CXGL	LEFT		2		
WMH007CXGR	RIGHT		2		
WMH012CXGL	LEFT		2		
WMH009CXGL	LEFT		1		
WMH015CXGR	RIGHT		1		
CCH042CMGS	RIGHT		3		
CCH060CMGS	LEFT		1		
CCH090CMFS	RIGHT		3		
CCH036CMGS	RIGHT		1		
LWP07DMD02	RIGHT		1		
Total Price:			36		

Payment terms are: net 30. If Bidder offers a cash discount for prompt payment, it will only be considered in determining the lowest responsible Bidder if the Bidder allows at least twenty (20) days for the prompt payment after the goods or services are received or after the invoice is rendered, whichever is later.

____ (Initial) I/We can furnish and deliver all items within 180 calendar days after the date of the written notice to proceed with the contract from the County.

To aid in the evaluation of bids, bidders must submit the original Bid Form and one copy of the Bid Form, Attachments, and detailed specification sheets, if applicable. If you fail to do so, your bid may be considered non-responsive and rejected.

Have you complied with this requirement? __Yes / __No.

Indicate whether your business _____ IS or _____ IS NOT located in Roanoke County. If it is, please include a copy of your Roanoke County business license with your bid.

I/We acknowledge the receipt of:

Addendum No. _____ Dated _____.

Addendum No. _____ Dated _____.

Addendum No. _____ Dated _____.

Addendum No. _____ Dated _____.

ATTACHMENT B: Virginia State Corporation Commission (SCC) Registration Information

The attention of each Bidder is directed to VA Code sections 54.1-1100, et seq. which requires certain licenses for contractors, tradesmen, and others. Each Bidder is required to determine which license, if any, it is required to have under such sections. Complete the following:

Bidder ___ does have or ___ does not have a Virginia Contractor's License. (Check appropriate block)

If Bidder has a Virginia Contractor's License, circle the class Bidder has and list the number.

Licensed "Class A", "Class B", or "Class C" Virginia Contractor Number: _____

If Bidder has another type of Virginia License, please list the type and number:

Type of license: _____ and number: _____.

Bidder is a ___ resident or ___ nonresident of Virginia. (Check appropriate blank.) See VA Code Sections 54.1-1100, et seq.

The attention of each Bidder is directed to Virginia Code Section 2.2-4311.2 which requires a bidder organized or authorized to transact business in the Commonwealth of Virginia pursuant to Title 13.1 or Title 50 of the Code of Virginia, as amended, or as otherwise required by law, shall include in its bid the Identification Number issued to such bidder by the Virginia State Corporation Commission (SCC). Furthermore, any bidder that is not required to be authorized to transact business in the Commonwealth of Virginia as a domestic or foreign business entity under Title 13.1 or Title 50 or as otherwise required by law shall include in its bid a statement describing why the bidder is not required to be so authorized. Please complete the following by checking the appropriate line that applies and providing the requested information:

- A. _____ Bidder is a Virginia business entity organized and authorized to transact business in Virginia by the SCC and such bidder's/offeror's Identification Number issued to it by the SCC is: _____.
- B. _____ Bidder is an out-of-state (foreign) business entity that is authorized to transact business in Virginia by the SCC and such bidder's Identification Number issued to it by the SCC is: _____.
- C. _____ Bidder does not have an Identification Number issued to it by the SCC and such bidder is not required to be authorized to transact business in Virginia by the SCC for the following reason(s):

Please attach additional sheets of paper if you need more space to explain why such bidder is not required to be authorized to transact business in Virginia.

Signature page required with submittal of bid

ATTACHMENT C: NOTICE OF PROPRIETARY INFORMATION FORM

Confidentiality References Protection in Accordance with the Code of Virginia, Section 2.2-4342

Section Title	Page #	Reason(s) for Withholding from Disclosure

INSTRUCTIONS: Identify the data or other materials to be protected and state the reasons by using the codes listed below. Indicate the specific words, figures, or paragraphs that constitute trade secrets or proprietary materials. The classification of an entire bid or proposal document, line item prices, and/or total bid or proposal prices as proprietary or trade secret is not acceptable and will result in rejection of the bid or proposal.

- A) This page contains information relating to "trade secrets", and "proprietary information" including processes. Operations, style of work, or apparatus. Identify confidential statistical data. Amount or source of any income...of any person (or) partnership. See Virginia Public Procurement Act. Section 2.2-4342. Unauthorized disclosure of such information would violate the Trade Secrets Act 18 U.S.C. 1905.
- B) This page contains proprietary information including confidential, commercial or financial information, which was provided to the Government on a voluntary basis and is of the type that would not customarily release to the public. See Virginia Public Procurement Act, Section 2.2-4342; 5 U.S.C. 552 (b) (4); 12 C.F.R. 309.5(c) (4).
- C) This page contains proprietary information including confidential, commercial or financial information. The disclosure of such information would cause substantial harm to competitive position and impair the Government's ability to obtain necessary information from contractors in the future. 5 U.S.C. See Virginia Public Procurement Act. Section 2.2-4342; 552 (b) (4)12 C.F.R. 309.5(c) (4).

ATTACHMENT D: PURCHASE ORDER TERMS AND CONDITIONS

1. Definitions.

County – Board of Supervisors of Roanoke County, Virginia (Includes any Agency for which Roanoke County is a fiscal agent, and sometimes also referred to as “Buyer”).

Items – All materials, goods, components, end products, data (including electronic data), work, and/or services described in and/or called for by the Purchase Order.

Purchase Order, Order or Service Contract – The Purchase Order, Service Contract or other document (which can include an electronic document) issued by the County to obtain the items identified in such document.

Vendor – The person or entity to which the Purchase Order is directed and who will provide the items identified therein (sometimes also referred to as Seller).

2. Invoicing.

All invoices shall be sent to the Buyer’s Contact and Address listed on the Purchase Order **OR** Contact Administrator and Address determined during contract negotiation.

3. Termination for Default and Convenience.

- A.** If Vendor refuses or fails to perform any of the terms of this Purchase Order, including but not limited to, failure to render the services, perform the work or provide materials described herein, the County may, by written notice to Vendor, terminate this Purchase Order, in whole or in part. In addition to any right to terminate, the County may enforce any remedy available at law or in equity in connection with such default, and Vendor shall be liable for all damages to the County resulting from Vendor’s default. The County further reserves the right to obtain immediately such items from other vendors in the event of Vendor’s default. Furthermore, the County may reject any items that do not comply with the requirements of this Purchase Order and any such items may be returned to Vendor at Vendor’s sole cost and risk of loss.
- B.** The County may also terminate this Purchase Order for convenience by giving written notice to Vendor at least 15 days prior to the effective date of cancellation. Any such termination shall be without liability of any type to the County except for payment for items delivered or completed services rendered to and accepted by the County.
- C.** The County may exercise the County’s right of setoff as to any amounts the County may owe the Vendor. County may require Vendor to transfer title and deliver to the County any or all items produced or procured by Vendor for performance of the work terminated.

4. Changes By Vendor.

No changes, deletions or additions may be made by the Vendor to this Purchase Order, including the terms and conditions, without the express written approval of the County.

5. Changes By County.

At any time the County may by written notice to Vendor make changes to the scope of this Purchase Order in any one or more of the following: (1) drawings, designs or specifications; (2) method of shipping/packaging; (3) place of inspection, delivery or acceptance; and/or (4) quantity. Vendor shall proceed immediately to perform this Purchase Order as changed. If any such change causes a material increase or decrease in the cost of the items, or the time required for performance of any part of the work required by this Purchase Order, the County and Vendor will agree upon an equitable adjustment in the price and/or delivery schedule. To qualify for adjustment consideration, Vendor must send written notice to the County of Vendor's intent to file a claim under this clause within 14 calendar days from the date of receipt by Vendor of such written notice of change. Vendor shall proceed with the changed Purchase Order pending resolution of the claim for adjustment. The County may act on any such claim at any time prior to final payment under this Purchase Order. Nothing in this clause shall excuse Vendor from proceeding with this Purchase Order as changed.

6. Payment.

The price(s) to be paid the Vendor shall be the current price(s) as stated in this Purchase Order. Unless otherwise stated in this Purchase Order, the price(s) shall include all applicable taxes and other charges such as packaging, shipping, duties, customs, tariffs and government imposed surcharges. All personal property taxes assessable upon the items prior to the receipt and acceptance by the County of such items shall be borne by Vendor. The County will not be responsible for or pay for any items that may be ordered or received without an authorized Purchase Order number. Except for subscription services, the County shall not pay for any goods or services until they have been delivered or rendered.

7. Appropriations

It is understood and agreed that this contract shall be subject to annual appropriations by the County of Roanoke, Board of Supervisors. Should the Board fail to appropriate funds for this contract, the contract shall be terminated when existing funds are exhausted. The supplier shall not be entitled to seek redress from the County of Roanoke, Virginia should the Board of Supervisors fail to make annual appropriations for this contract.

8. Sales Tax Exemption.

The County is exempt from payment of State and/or Federal Sales and Use Tax on all tangible personal property purchased or leased for the County's use or consumption. Upon notification, the County will furnish a certificate of exemption.

9. Free on Board (F.O.B.), Risk of Loss, and Title.

All prices are to be quoted F.O.B. Destination. The risk of loss from any casualty, regardless of cause, shall be on the Vendor until the items have been delivered to the place specified in the Purchase Order and accepted by the County. The risk of loss shall also be on the Vendor during the return of any items to the Vendor. Title to the items shall pass to the County upon receipt and acceptance of such items by the County at the designated destination

10. Inspection.

The County shall have a reasonable time after receipt of items and before payment to inspect all items for conformity with this Purchase Order. If all or some of the items delivered to the County do not fully conform to the provisions herein, the County shall have the right to reject and return such nonconforming items.

11. Insurance.

Vendor, and any of its subcontractors, shall, at its sole expense, obtain and maintain during the term of this Purchase Order the insurance policies and/or bonds, if any, that may be required by this Purchase Order.

12. Warranty.

Vendor hereby warrants that all items and work covered by this Purchase Order shall conform to the specifications, drawings, samples, or other description furnished by the County and shall be merchantable, of good material and workmanship, and free from any defects. Vendor also warrants good title to and freedom from any encumbrances for all items and warrants against any infringement. Acceptance by Vendor may not exclude any warranty. If this Purchase Order is for services, Vendor warrants that the services shall be completed in a professional, good and workmanlike manner, with the degree of skill and care that is required by like vendors in Virginia. Further, Vendor warrants that such services shall be completed in accordance with the applicable requirements of this Purchase Order and shall be correct and appropriate for the purposes contemplated in this Purchase Order. Such warranties are in addition to any of the Vendor's other guarantees or obligations under this Purchase Order, or those that may arise by statute or regulation. Vendor agrees that Vendor shall repair or replace, at Vendor's sole expense, and to the satisfaction of the County, any items, work, material, equipment, or part of the item that is found by the County to be defective or not in accordance with the terms of this Purchase Order.

13. Independent Contractor.

The relationship between Vendor and the County is a contractual relationship. Vendor shall, at all times, maintain its status as an independent contractor. County and Vendor acknowledge that neither is an agent, partner or employee of the other for any purpose. Vendor shall be responsible for causing all required insurance, workers' compensation and unemployment insurance to be provided for itself and all its employees and subcontractors. Vendor will be responsible for all actions and omissions of any of its subcontractors, and certifies that all subcontractors are properly licensed.

14. Nondiscrimination.

Vendor shall comply with the nondiscrimination provisions of Section 2.2-4311 of the Code of Virginia, which are incorporated herein by reference.

15. Drug-Free Workplace.

Vendor shall comply with the drug-free workplace provisions of Section 2.2-4312 of the Code of Virginia, which are incorporated herein by reference.

16. Faith-Based Organizations.

Pursuant to the Code of Virginia, Section 2.2-4343.1, be advised that the County does not discriminate against faith-based organizations.

17. Assignment.

Vendor may not assign or transfer this Purchase Order in whole or in part except with the prior written consent of the County, which consent shall not be unreasonably withheld.

18. Successors and Assigns.

The terms, conditions, provisions, and undertakings of this Purchase Order shall be binding upon and inure to the benefit of each of the parties hereto and their respective successors and assigns.

19. Indemnification.

Vendor agrees to indemnify and hold harmless the County and its officers, governing body, employees, and agents against any and all liability, losses, damages, claims, causes of action, suits of any nature, costs, and expenses, including reasonable attorney's fees, arising out of or caused by Vendor's or its employees, agents, or subcontractors' actions, activities, or omissions, arising in any way out of or resulting from any of the work, services, or items to be provided under this Purchase Order. In the event that suit is brought against the County, its officers, governing body, and/or its employees (either independently or jointly with the Vendor), arising out of this Purchase Order and/or the goods and/or services that are the subject of this Purchase Order, the

Vendor shall defend the County, its officers and employees, in any such suit at no cost to them. In the event that final judgment is obtained against the County, its officers and/or its employees, either independently or jointly with the supplier, then the Vendor shall pay such judgment, including costs and attorneys' fees, if any, and hold the County, its officers and employees, harmless therefrom.

20. Governing Law and Forum Selection.

By virtue of entering into this Purchase Order, Vendor submits itself to a court of competent jurisdiction in Roanoke County, Virginia, and further agrees that this Purchase Order is controlled by the laws of the Commonwealth of Virginia and that all claims, disputes, and other matters shall only be decided by such court according to the laws of the Commonwealth of Virginia.

21. Acceptance – Entire Agreement - Modification.

Acceptance of this Purchase Order shall be limited to the terms and conditions herein or as modified pursuant to the procedure set forth herein. To the extent that any terms and conditions in the Vendor's acknowledgment, bid, or other forms conflict with those contained in this Purchase Order, those contained in the Purchase Order shall prevail. This Purchase Order shall be deemed accepted and agreed to upon the commencement of performance by the Vendor. County rejects any additional and/or inconsistent terms and conditions offered by Vendor at any time, irrespective of County's acceptance of or payment for Vendor's items. The provisions of this Purchase Order, including these terms and conditions, constitute the entire agreement between the parties and no change to or modification of this Purchase Order shall be binding upon County unless signed by an authorized representative of County's purchasing office. Vendor's shipment or provision of the items and/or performance of services as called for in this Purchase Order shall constitute acceptance by Vendor of this Purchase Order with its terms and conditions.