

PART 1 – BID REQUIREMENTS

- A. Specifications herein will be incorporated with the State of Indiana *Professional Services Contract Template* (found at <https://www.in.gov/idoa/state-purchasing/contract-administration/contract-forms-manuals-and-templates/>) to create the full **DNR Preventative Maintenance Service Contract**. Prior to submitting their completed *Request for Quotation (RFQ)* bid packet, Contractors are responsible for reviewing all clauses in the template and discussing any desired modifications with the DNR Purchasing Buyer.
- B. Prior to bidding, it is the responsibility of each Contractor to thoroughly familiarize themselves with:
- the location(s) of the proposed site(s),
 - the tools, materials, maintenance-related parts, and labor necessary to execute the required services,
 - each site's seasonal start-up/shut down timing, maintenance histories, and active equipment warranties, and
 - the existence of any deferred maintenance items.
- C. Prior to bidding, and/or as soon as it is known throughout the life of the contract, the Contractor shall notify the State, in writing, of any deferred maintenance, or obsolete equipment, maintenance-related parts or components, that are not maintainable under the terms of the contract. Contractors may perform site visits, if desired, prior to submitting bid proposals to inspect and evaluate all equipment relevant to the contract. If notification of non-maintainable equipment occurs prior to the bid due/open date, then the State will inform other bidders accordingly of the disposition of those items, by addendum of these specifications. If no such notification by the Contractor is given, then the Contractor shall be responsible, at no additional charge to the State, for the preventative maintenance services for all items, regardless of condition, as set forth in this contract.
- D. At a minimum, pricing which shall be included in the Contractor's bid are the following: all overhead, profit, equipment, materials, vehicles, tools, overtime, travel expenses, and labor costs for crews performing the scheduled service visits.

PART 2 – GENERAL REQUIREMENTS

- A. Failure of the Contractor to meet all terms and conditions in the final, executed contract will result in termination of the contract.
- B. Contractor shall perform an initial site inspection separate from and prior to any pre-scheduled service visits. During this initial inspection, the Contractor shall:
- Discuss with the property manager and the operators of equipment, or their designees, any maintenance problems encountered historically,
 - Become aware of manufacturer servicing recommendations and any existing equipment warranties,
 - Develop a maintenance protocol, and
 - Return to proper condition any system that is discovered not to be in proper operation, as defined by equipment maintenance manuals and/or this contract's specifications, and

- Review onsite operations and preventative maintenance documentation (e.g. manufacturer's maintenance recommendations, conditions reports, inspections, etc.) and provide any relevant maintenance documents that may be missing.
- C. It is the responsibility of the Contractor to verify the system equipment and any included appurtenant devices/systems during the initial inspection and, prior to beginning work, provide a written assessment of system equipment and appurtenant devices/systems, including any necessary correction or update to the provided Schedule A (see **PART 9 – SCHEDULE A**).
- D. The State shall provide the Contractor with a reasonable means of accessing the equipment covered by this contract. The Contractor shall be free to start and stop all primary equipment critical to the operation of the systems listed herein as arranged with the site's property manager or their designee.
- E. In the event a system is altered, or if any equipment is added or deleted, the specifications and contract shall be amended by the State as required to reflect these changes.
- F. The Contractor shall be liable for damage to property or injury to persons directly resulting from accidents caused by the performance or non-performance of its obligations under this contract.

PART 3 – EMERGENCY SERVICES

- A. Contractor may be called upon by the State to provide emergency services related to the systems and equipment identified within the scope of this contract. Emergencies shall be considered as additional to, and outside of, the specifications, terms, and conditions, outlined by this preventative maintenance services contract and its related purchase order. Emergency services are defined as work requested by the State which is outside of the dates identified in the planned maintenance schedule submitted by the Contractor and in exception to the conditions and requirements outlined in the contract's technical specifications.
- B. Emergency calls may occur outside of normal business hours, including evenings, weekends, or holidays, and may necessitate the incurrence of overtime to maintain proper operation of the systems listed herein. The Contractor shall respond by phone to an emergency call within thirty (30) minutes and provide onsite service within a timeframe agreed upon with the site's property manager or their designee. If the Contractor is unable to respond timely, or is unable to provide the requested emergency service, then the site's property manager may opt to contact another vendor.
- C. Emergency calls shall be invoiced by the Contractor separately from any planned costs allowable under this preventative maintenance services contract.

PART 4 – CODE REQUIREMENTS AND MANUFACTURER INSTRUCTIONS

- A. Contractor shall perform the work under this contract in accordance with the requirements of manufacturer recommendations, industry standards, and all Federal, State and Local codes govern the requirements of the services. In case of conflicts between State and Local codes and regulations, State codes and regulations shall prevail.
- B. Contractor shall immediately notify the State, in writing, if they observe that these contract specifications are at variance with or in conflict of the service instructions of any manufacturer in any respect.

- C. If the Contractor performs any work contrary to State Building Rules and Regulations, ordinances, or any manufacturer's printed instructions, then the Contractor shall bear all costs resulting from such non-compliance.

PART 5 – SCHEDULING SERVICE VISITS

- A. All work pursuant to the preventative maintenance services contract shall be performed Monday through Friday, between the hours of 8 am and 5 pm (local site time), unless otherwise authorized in advance by the site's property manager or their designee. On each scheduled day of service, prior to performing any work or inspections, the Contractor's personnel shall report to the site's office to inform the site's property manager or their designee of their arrival.
- B. Each preventive maintenance service visit shall be pre-scheduled and directed from a maintenance management program initiated and maintained by the Contractor.
- C. A scheduled visit is defined as the contiguous number of work hours or days required to inspect and service the identified equipment outlined in or implied as covered in the scope of this specification and contract. This, however, does not limit the Contractor from scheduling as many inspections or service calls as deemed practical and necessary to keep all equipment in satisfactory operating condition.
- D. Scheduled visits may not begin until the contract and its related purchase order have been fully executed and approved. The Contractor's preventative maintenance schedule shall be submitted to the site's property manager or their designee, at least seven (7) days prior to the first visit. This schedule shall specify the following:
- Dates of scheduled preventive maintenance service visits per building or equipment
 - Description of service to be performed during each visit
 - Listing of the service report/work order document(s) that will be submitted by the Contractor after each service visit
- E. Once the Contractor's maintenance schedule has been submitted and approved, no deviation from the scheduled date(s) of service shall be permitted without prior approval from the site's property manager or their designee.
- F. Any required call-back maintenance within ten (10) calendar days of a scheduled maintenance visit shall be considered a continuation of the visit service period and not considered as a separate emergency visit. Call backs on failed equipment which has not received the required service within the service period shall be considered as covered expenses within this contract and shall not be charged to the State.
- G. No additional fees shall be charged to the State for time spent by the Contractor's personnel awaiting the arrival of additional coworkers or the delivery of tools, materials, parts, or equipment, nor will additional fees be charged for multiple visits resulting from contractor deficiencies including, but not limited to, inexperienced personnel, incorrect or temporary installation of parts/equipment, or poor workmanship.

- H. If the Contractor does not appear for a preventative maintenance service visit on the scheduled date(s) and has not made any prior reasonable attempt to reschedule the date(s), then payment shall not be approved for that maintenance period.

PART 6 – SERVICE DOCUMENTATION

- A. Immediately upon conclusion of a scheduled preventative maintenance or emergency service visit, the Contractor shall provide the site's property manager or their designee with a legible service report or work order, including any checklist(s) or notes. If, for some reason, the property manager or their designee cannot be located at the conclusion of the service visit, then the service report/work order shall be provided via email or US Mail by the Contractor directly to the site within three (3) business days after the visit.
- B. Service reports/work orders shall state what work was performed on what equipment, as well as the location, the technician's name, the wrench time for each item, and a list of all maintenance-related parts and materials used during performance of the preventative maintenance service visit.
- C. The State shall sign the provided service report/work order and retain one (1) copy. Failure to supply a complete, legible, and acceptable service report/work order will constitute an incomplete service visit.

PART 7 – PAYMENT

- A. Payment shall follow all terms and conditions outlined within the preventative maintenance services contract and/or the associated purchase order.
- B. The contract pricing base bid shall be payable in arrears.
- C. Invoices resulting from preventative maintenance service or emergency visits shall be provided directly to the site's property manager or their designee either at the conclusion of the service visit or via email or US Mail no later than seven (7) business days after the conclusion of the service visit. The State shall require the Contractor to update or adjust the invoice date on any invoices not provided in a timely manner.
- D. Invoices will not be processed until any necessary post-service visit inspections by the State have been completed.

PART 8 – SUMMARY OF WORK

- A. Contractor shall provide sufficient means and methods, including experienced and qualified personnel, to keep all equipment covered by these specifications operating properly.
- B. Contractor shall be able to program and service the control systems specific to the site(s) and equipment included in this agreement and shall be responsible for the procurement of any software required to perform this function.

- C. Work shall be performed on major items of equipment listed in **PART 9 – SCHEDULE A** at the site(s) indicated on this bid/contract, plus any appurtenant devices/systems that are related to the listed equipment covered by this contract.
- D. This preventative maintenance services program shall include the systematic inspections, service, restoration, maintenance-related part replacements, call-back service, testing, cleaning and adjustments, as specified herein, to maintain all **Heating, Ventilating, and Air Conditioning, and Water Treatment Equipment** in accordance with manufacturer specifications, industry standards, building codes, and State expectations. This includes, but is not limited to, boilers, exhaust fans, temperature controls, air compressors (used for temperature control), potable water heaters, softening equipment, cooling towers, condensers, all related valves, pumps, dampers, diffusers, and controls; and appurtenant devices and systems related to the HVAC equipment, including but not limited to, valves, pneumatic switches, back flow preventers, dampers, and diffusers.
- E. Unless identified on the Schedule A, the Contractor shall make **four (4) pre-scheduled service visits per year**, conducted Quarterly, and perform all necessary preventive maintenance services as required by these specifications. Facilities with equipment requiring two (2) seasonal visits per year shall be conducted Spring/Fall, while equipment requiring additional visits are noted on the Schedule A. Where two (2) visits are specified, the Contractor shall schedule with the site's property manager or their designee all planned work requiring completion before seasonal start-up each year, as well as assist the site with seasonal shut down of equipment, including winterization of components subject to freezing.

Temperature Control Systems:

- 1. Examine each piece of equipment and device to ensure proper functioning and good operational condition, as well as any components of an older pneumatic system that may be in use including air compressor, dryer, condensate drainage systems, etc.
- 2. Calibrate all sensing, monitoring, output, safety, and readout devices for proper ranges, settings, and optimum efficiencies per the State's requests.
- 3. Adjust all linkages, drives, dampers, diffusers, etc. that have drifted from initial design setting and positions.
- 4. Clean and lubricate all equipment as required.
- 5. Inspect piping and valves for leaks; tighten connections as necessary.
- 6. Clean area around equipment.
- 7. Exercise and lubricate all valves and treat all corrosion found.

Chillers:

- 1. Inspections shall include a complete system diagnostic test and check of all safety controls, operating pressures, temperatures, oil level, refrigerant level, amps, voltage, and all controls pertaining to the units.
- 2. Repair any leaks and replace refrigerant lost. Report all leaks and amount of refrigerant used.
- 3. Inspect, calibrate, repair, or replace defective controls.
- 4. On shutdown, perform the necessary preventive maintenance-related repairs and service as required including winterization required. This work shall include, but is not limited to, changing dryer cores and oil, oil analysis, inspection, and cleaning condenser tubes, and conducting eddy current tests at least every five (5) years, where applicable. Contractor must determine when next test is due and provide a copy of the previous test. If one cannot be found, Contractor must assume it is due.
- 5. If a problem is detected that requires a tear down inspection of the unit, this shall be reported immediately to the site's property manager or their designee. Tear-down and replacement of major, stand-alone-type compressors are not included within the scope of this contract and shall require

prior approval and payment outside of this contract, under a separate invoice and purchase order (which may include the State's Public Works emergency process).

6. Inspect piping and valves for leaks; tighten connections as necessary.
7. Clean area around equipment.

Condensers:

1. Check unit for proper operation, excessive noise, or vibration.
2. Pressure wash all coils and fans with appropriate coil cleaning solution.
3. Check electrical wiring and connections; tighten loose connections. If power factor correction is suspected or under-sizing of conductors, report these findings.
4. Lubricate shaft bearings and motor end bearings.
5. Inspect fans or blowers for bent blades or imbalance; adjust or replace as needed.
6. Check belts for condition, proper tension, and misalignment; adjust or replace as needed. All replaced belts must be pre-tensioned prior to installation. Multiple belts shall be matched and replaced all at one time.
7. Inspect piping and valves for leaks; tighten connections as necessary.
8. Clean area around equipment including sweeping area and contacting the site's property manager or their designed about any clutter DNR staff must remove. Indicate this in the report.

Air Handlers and Forced Air Equipment:

1. Inspect each piece of equipment and all controls for proper operation, alignments, and calibration.
2. Check for unusual noise or vibration.
3. Lubricate all moving parts as required.
4. Check for wear, alignment, and proper tension; adjust or replace belts as required. Pre-tension all replacement belts.
5. Visually inspect and clean coils, fans, drain pan, blower, motor, condensate pan or pumps, piping, and once per year check for leaks and treat for algae or molds. Where mold seems excessive, provide recommendations for improvement such as UV or other means.
6. Replace air filters four (4) times per year using pleated filters. For residences and equipment operated seasonally, replace air filters two (2) times per year using pleated filters. At no time will filter media be replaced with a less efficient type. High efficiency and UV filtration are included in this contract, including UV tube replacement in compliance with manufacturer recommendations.
7. Inspect piping and valves for leaks; tighten connections as necessary.
8. Clean area around equipment including sweeping area and contacting site's property manager or their designee about clutter DNR staff must remove. Indicate this in the report.
9. Humidifiers will have annual service including media replacement and water conditioning/filtering as required.
10. All forced air systems serving public use facilities shall be balanced once per year for air distribution. A balance report shall be submitted to the site's property manager or their designee. Check steam/condensation traps annually while in operation.

Chilled/Hot Water Supply/Return Pumps and Hot Water Circulating Pumps:

1. Inspect all pumps for proper operation and assure no cavitation or NPSH problems exist.
2. Clean and lubricate as required.
3. Check isolation valves and gauges; provide if missing or not working. Establish a gauge reading schedule to record findings on date, temperatures, or pressures.
4. Provide a means to diagnose operational problems, determine GPM, Delta T, system balance, and system curve.
5. Inspect piping and valves for leaks; tighten connections as necessary. Excessive condensation on piping should be reported and insulated. Repair/replace failed insulation.

6. Balance all hydronic systems once per year for water distribution.
7. Clean area around equipment including sweeping area and contacting the site's property manager or their designee about clutter DNR staff must remove.

Potable Water Heaters:

1. Drain and flush all water heaters one (1) time per year at all locations after turning equipment off. Check that the pressure temperature relief valve is functioning properly, and the piping is grounded as required.
2. Check smoke pipe and related exhaust equipment, burner areas, power ventilators, combustion chambers, isolation valves, pressure relief valves (including drains accepting flows from these devices), tank, and other controls and circulating pumps for proper operation. Remove corrosion and repaint as needed.
3. Inspect piping and valves for leaks; tighten connections as necessary.
4. Clean area around equipment.

Boilers:

1. Check all safety devices, controls, and operating controls.
2. Clean, inspect, lubricate, and perform any necessary adjustments to obtain optimum burner(s) efficiency.
3. Include burner test reports with the service report.
4. Clean area around equipment.
5. Complete maintenance checklist and report deficiencies to the site's property manager or their designee.
6. Perform annual inspection of units to determine code safety requirements and satisfactory operation. Provide written report to the site's property manager or their designee.
7. Boilers, burners, fuel delivery and filtration systems (including fuel oil filters, vents, and overflow warning systems), condensate return systems, and water treatment services including chemical injection equipment and storage, including the cost of chemicals used, are the contractor's responsibility. Perform tests with every visit to ensure proper chemical treatment is occurring via analysis of the boiler chemistry typical of these systems. All boiler rooms shall have a valve inventory made and each valve tagged with a brass tag. A valve and pump schedule shall be placed in the boiler room identifying each valve and pump by tag, what its function is, and when it is to be exercised for what purpose (start-ups/shutdowns etc. such as for lock-out tag-out purposes). A complete seasonal start up and shutdown instruction sheet shall also be placed next to the valve schedule – mounted for visibility and laminated for protection. An electronic copy of these documents shall be given to the site's property manager or their designee.

Water Conditioning and Softening Equipment:

1. Check hardness before and after conditioning in equipment room and farthest fixture. Report findings and recommendations.
2. Check calibration of equipment and adjust for fewer than 5-grains hardness for other than boiler feed uses (which shall be less than 1-grain hardness). Chemical treatment of boiler water shall be provided where needed and contractor shall be responsible for chemicals added and reports of conditions treated. All boilers for State Park Inns shall be tested for water quality four (4) times per season of operation.
3. Check usage of salt and report if excessive or low for expected use. Report level of media where the softening occurs. Verify that it is not being flushed into the potable water system during regeneration.

4. Annually clean the equipment and verify that back flushing and regeneration cycles are adequate, and that softening media is at adequate levels and not being expelled into the system. Inspect piping and valves for leaks; tighten connections as necessary.
5. Clean area around equipment including sweeping area and contacting the site's property manager or their designee about clutter DNR staff must remove. Indicate this in the report.

Cross-Connection Control Devices:

- Shall be inspected by a backflow inspector or tester who has successfully completed training in the testing and inspection of cross connection control devices from an IDEM-approved training provider.
- Devices shall be maintained, repaired, and documented as stipulated in the IDEM Cross Connection and Backflow Prevention Manual.

Swimming Pool and Spa Equipment (if included on Schedule A):

1. Where facilities have swimming pools or spas, all the associated HVAC, potable water heating, dehumidification, pumps, filtration, chemical treatment, valves, piping, and controls shall be covered in this specification, whether or not listed in the Schedule A.
2. Inn pools shall be visited four (4) times per year; Park (outdoor) pools shall be visited two (2) times per year for scheduled preventive maintenance. In addition, one (1) mid-season operational check is required to verify proper operation of all equipment.
3. Test the electrical connections, grounding, and proper watertight seal of fixtures. Replace submerged light bulbs where needed.

PART 9 – SCHEDULE A

For each site covered by this contract, the **Schedule A** provides the following:

- Contact information for the IDNR site's property manager or their designee
- Inventory of equipment to be serviced, including its location at the site, description, manufacturer, and other known identifying information
- List of equipment warranties with expiration dates

The Schedule A shall be updated by the Contractor throughout the life of the contract.

The Schedule A document(s) relevant to this contract are attached to these specifications on the following page(s).