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|  <b>UNIVERSITY OF<br/>SOUTH CAROLINA</b> | <b>REQUEST<br/>FOR<br/>PROPOSALS</b> | Solicitation Number | <b>USC-RFP-2816-CJ</b>        |
|   |                                      | Date Printed        | <b>May 15, 2015</b>           |
|   |                                      | Date Issued         | <b>May 15, 2015</b>           |
|   |                                      | Procurement Officer | <b>Charles Johnson</b>        |
|   |                                      | Phone               | <b>803-777-4115</b>           |
|   |                                      | E-Mail Address      | <b>charles.johnson@sc.edu</b> |

DESCRIPTION: **PROVIDE HVAC SYSTEMS WATER TREATMENT CHEMICALS AND SERVICES FOR USC UPSTATE**

USING GOVERNMENT AGENCY: UNIVERSITY OF SOUTH CAROLINA

*The Term "Offer" Means Your "Bid" or "Proposal".*

SUBMIT OFFER BY: (Opening Date/Time): **6/2/2015 at 3:00 PM** See "Deadline for Submission of Offer" provision

QUESTIONS MUST BE RECEIVED BY: **5/22/2015 at 11:00 AM** See "Questions From Offerors" provision

NUMBER OF COPIES TO BE SUBMITTED: **One (1) Original and Three (3) Hardcopies (marked "COPY") Plus (1) Electronic Copy (Original Hardcopy Shall Prevail)**

**Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior.**

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

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| <b>MAILING ADDRESS:</b>  | <b>PHYSICAL ADDRESS:</b>   |
| University of South Carolina – Purchasing Dept.<br>1600 Hampton St., Suite 606<br>Columbia, SC 29208 | University of South Carolina – Purchasing Dept.<br>1600 Hampton St., Suite 606<br>Columbia, SC 29208 |

See "Submitting Your Offer" provision

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| <b>CONFERENCE TYPE: N/A</b><br><b>DATE &amp; TIME:</b><br><br>As appropriate, see "Conferences-Pre-Bid/Proposal" & "Site Visit" provisions | <b>LOCATION:</b> |
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| <b>AWARD &amp; AMENDMENTS</b> | Award will be posted at the Physical Address stated above on <b>6/15/2015</b> . The award, this solicitation, and any amendments will be posted at the following web address: <a href="http://purchasing.sc.edu">http://purchasing.sc.edu</a> |
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You must submit a signed copy of this form with Your Offer. By submitting a bid or proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the Opening Date.

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| <b>NAME OF OFFEROR</b><br><small>(Full legal name of business submitting the offer)</small>   | <b>OFFEROR'S TYPE OF ENTITY:</b><br><small>(Check one)</small><br><input type="checkbox"/> Sole Proprietorship<br><input type="checkbox"/> Partnership<br><input type="checkbox"/> Corporate entity (not tax-exempt)<br><input type="checkbox"/> Tax –exempt corporate entity<br><input type="checkbox"/> Government entity (federal, state, or local)<br><input type="checkbox"/> Other _____<br><small>(See "Signing Your Offer" provision.)</small> |
| <b>AUTHORIZED SIGNATURE</b><br><small>(Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above.)</small> |  |
| <b>TITLE</b><br><small>(Business title of person signing above)</small>   |  |
| <b>PRINTED NAME</b><br><small>(Printed name of person signing above)</small>  |  |
| <b>DATE SIGNED</b>  |  |

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the offeror above. An offer may be submitted by only one legal entity. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, *i.e.*, a separate corporation, partnership, sole proprietorship, etc.

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| <b>STATE OF INCORPORATION</b>                                   | <small>(If offeror is a corporation, identify the state of Incorporation.)</small> |
| <b>TAXPAYER IDENTIFICATION NO.</b>                              |  |
| <small>(See "Taxpayer Identification Number" provision)</small> |  |

**PAGE TWO**  
**(Return Page Two with Your Offer)**

|  |   |           |           |           |           |                |  |  |  |
|--|---|-----------|-----------|-----------|-----------|----------------|--|--|--|
| <b>HOME OFFICE ADDRESS</b> (Address for offeror's home office / principal place of business) | <b>NOTICE ADDRESS</b> (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause)   |           |           |           |           |                |  |  |  |
|  | <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:15%;">Area Code</td> <td style="width:25%;">Number</td> <td style="width:25%;">Extension</td> <td style="width:35%;">Facsimile</td> </tr> <tr> <td colspan="4" style="padding: 5px;">E-mail Address</td> </tr> </table> | Area Code | Number    | Extension | Facsimile | E-mail Address |  |  |  |
| Area Code  | Number  | Extension | Facsimile |           |           |                |  |  |  |
| E-mail Address   |   |           |           |           |           |                |  |  |  |

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| <b>PAYMENT ADDRESS</b> (Address to which payments will be sent.) (See "Payment" clause)  | <b>ORDER ADDRESS</b> (Address to which purchase orders will be sent) (See "Purchase Orders" and "Contract Documents" clauses)                        |
| <input type="checkbox"/> Payment Address same as Home Office Address<br><input type="checkbox"/> Payment Address same as Notice Address (check only one) | <input type="checkbox"/> Order Address same as Home Office Address<br><input type="checkbox"/> Order Address same as Notice Address (check only one) |

|  |               |                      |               |                      |               |                      |               |                      |
|--|---------------|----------------------|---------------|----------------------|---------------|----------------------|---------------|----------------------|
| <b>ACKNOWLEDGMENT OF AMENDMENTS</b><br><br>Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue.<br><br>See "Amendments to Solicitation" Provision | Amendment No. | Amendment Issue Date | Amendment No. | Amendment Issue Date | Amendment No. | Amendment Issue Date | Amendment No. | Amendment Issue Date |
|  |               |                      |               |                      |               |                      |               |                      |
|  |               |                      |               |                      |               |                      |               |                      |

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| <b>DISCOUNT FOR PROMPT PAYMENT</b><br>See "Discount for Prompt Payment" clause | 10 Calendar Days (%) | 20 Calendar Days (%) | 30 Calendar Days (%) | _____ Calendar Days (%) |
|--|----------------------|----------------------|----------------------|-------------------------|

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| <b>PREFERENCES – SC RESIDENT VENDOR PREFERENCE</b> (June 2005): Section 11-35-1524 provides a preference for offerors that qualify as a resident vendor. A resident vendor is an offeror that (a) is authorized to transact business within South Carolina, (b) maintains an office* in South Carolina, (c) either (1) maintains a minimum \$10,000.00 representative inventory at the time of the solicitation, or (2) is a manufacturer which is headquartered and has at least a ten million dollar payroll in South Carolina, and the product is made or processed from raw materials into a finished end-product by such manufacturer or an affiliate (as defined in section 1563 of the Internal Revenue Code) of such manufacturer, and (d) has paid all assessed taxes. If applicable, preference will be applied as required by law. | <b>OFFERORS REQUESTING THIS PREFERENCE MUST INITIAL HERE.</b> _____<br><br>*ADDRESS AND PHONE OF IN-STATE OFFICE<br><br><input type="checkbox"/> In-State Office Address same as Home Office Address<br><input type="checkbox"/> In-State Office Address same as Notice Address<br><div align="right"><b>(CHECK ONLY ONE)</b></div> |
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| <b>PREFERENCES – SC/US END-PRODUCT</b> (June 2005): Section 11-35-1524 provides a preference to vendors offering South Carolina end-products or US end-products, if those products are made, manufactured, or grown in SC or the US, respectively. An end-product is the item identified for acquisition in this solicitation, including all component parts in final form and ready for the use intended. The terms "made," "manufactured," and "grown" are defined by Section 11-35-1524(B). By signing your offer and checking the appropriate space(s) provided and identified on the bid schedule, offeror certifies that the end-product(s) is either made, manufactured or grown in South Carolina, or other states of the United States, as applicable. Preference will be applied as required by law. | <b>IF THIS PREFERENCE APPLIES TO THIS PROCUREMENT, PART VII (BIDDING SCHEDULE) WILL INCLUDE A PLACE TO CLAIM THE PREFERENCE. OFFERORS REQUESTING THIS PREFERENCE MUST CHECK THE APPROPRIATE SPACES ON THE BIDDING SCHEDULE.</b> |
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## **Solicitation Outline**

- I. Scope of Solicitation
- II. Instructions to Offerors
  - A. General Instructions
  - B. Special Instructions
- III. Scope of Work / Specifications  
May be blank if Bidding Schedule / Cost Proposal attached
- IV. Information for Offerors to Submit
- V. Qualifications
- VI. Award Criteria
- VII. Terms and Conditions
  - A. General
  - B. Special
- VIII. Bidding Schedule / Cost Proposal
- IX. Attachments to Solicitation

### **I. Scope Of Solicitation**

ACQUIRE SERVICES (January 2006): The purpose of this solicitation is to acquire services complying with the enclosed description and/or specifications and conditions.

MAXIMUM CONTRACT PERIOD — ESTIMATED (January 2006): [August 13, 2015 – August 12, 2020] Dates provided are estimates only. Any resulting contract will begin on the date specified in the notice of award. See clause entitled "Term of Contract – Effective Date / Initial Contract Period".

It is the intent of the University of South Carolina to solicit proposals from qualified sources of supply to provide a complete service-oriented water treatment program to include chemical products and water treatment services in accordance with all requirements stated herein.

### **II. Instructions To Offerors - A. General Instructions**

DEFINITIONS (JANUARY 2006) EXCEPT AS OTHERWISE PROVIDED HEREIN, THE FOLLOWING DEFINITIONS ARE APPLICABLE TO ALL PARTS OF THE SOLICITATION.

AMENDMENT – means a document issued to supplement the original solicitation document.

BUYER – means the Procurement Officer.

CHANGE ORDER - means any written alteration in specifications, delivery point, rate of delivery, period of performance, price, quantity, or other provisions of any contract accomplished by mutual agreement of the parties to the contract.

CONTRACT - See clause entitled "Contract Documents & Order of Precedence."

CONTRACT MODIFICATION – means a written order signed by the Procurement Officer, directing the contractor to make changes which the changes clause of the contract authorizes the Procurement Officer to order without the consent of the contractor.

CONTRACTOR - means the Offeror receiving an award as a result of this solicitation.

COVER PAGE – means the top page of the original solicitation on which the solicitation is identified by number. Offerors are cautioned that Amendments may modify information provided on the Cover Page.

OFFER – means the bid or proposal submitted in response this solicitation. The terms "Bid" and "Proposal" are used interchangeably with the term "Offer."

OFFEROR – means the single legal entity submitting the offer. The term "Bidder" is used interchangeably with the term "Offeror." See bidding provisions entitled "Signing Your Offer" and "Bid/Proposal As Offer To Contract."

ORDERING ENTITY - Using Governmental Unit that has submitted a Purchase Order.

PAGE TWO – means the second page of the original solicitation, which is labeled Page Two.

PROCUREMENT OFFICER – means the person, or his successor, identified as such on the Cover Page.

YOU and YOUR – means Offeror.

SOLICITATION – means this document, including all its parts, attachments, and any Amendments.

STATE – means the Using Governmental Unit(s) identified on the Cover Page.

SUBCONTRACTOR – means any person having a contract to perform work or render service to Contractor as a part of the Contractor's agreement arising from this solicitation.

USING GOVERNMENTAL UNIT – means the unit(s) of government identified as such on the Cover Page. If the Cover Page names a “Statewide Term Contract” as the Using Governmental Unit, the Solicitation seeks to establish a Term Contract [11-35-310(35)] open for use by all South Carolina Public Procurement Units [11-35-4610(5)].

WORK - means all labor, materials, equipment and services provided or to be provided by the Contractor to fulfill the Contractor’s obligations under the Contract.

AMENDMENTS TO SOLICITATION (JANUARY 2006) (a) The Solicitation may be amended at any time prior to opening. All actual and prospective Offerors should monitor the following web site for the issuance of Amendments: <http://purchasing.sc.edu>. (b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment. (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

AWARD NOTIFICATION (NOV 2007): Notice regarding any award or cancellation of award will be posted at the location specified on the Cover Page. If the contract resulting from this Solicitation has a total or potential value of fifty thousand dollars or more, such notice will be sent to all Offerors responding to the Solicitation. Should the contract resulting from this Solicitation have a total or potential value of one hundred thousand dollars or more, such notice will be sent to all Offerors responding to the Solicitation and any award will not be effective until the eleventh day after such notice is given. [02-2A010-1]

BID / PROPOSAL AS OFFER TO CONTRACT (JANUARY 2006) By submitting Your Bid or Proposal, You are offering to enter into a contract with the Using Governmental Unit(s). Without further action by either party, a binding contract shall result upon final award. Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror on the Cover Page. An Offer may be submitted by only one legal entity; “joint bids” are not allowed.

BID ACCEPTANCE PERIOD (JANUARY 2006) In order to withdraw Your Offer after the minimum period specified on the Cover Page, You must notify the Procurement Officer in writing.

BID IN ENGLISH & DOLLARS (JANUARY 2006) Offers submitted in response to this solicitation shall be in the English language and in US dollars, unless otherwise permitted by the Solicitation.

CERTIFICATION REGARDING DEBARMENT AND OTHER RESPONSIBILITY MATTERS (JANUARY 2006)

(a)(1) By submitting an Offer, Offeror certifies, to the best of its knowledge and belief, that-

(i) Offeror and/or any of its Principals-

(A) Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any state or federal agency;

(B) Have not, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

(C) Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of this provision.

(ii) Offeror has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any public (Federal, state, or local) entity.

(2) "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions).

(b) Offeror shall provide immediate written notice to the Procurement Officer if, at any time prior to contract award, Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

(c) If Offeror is unable to certify the representations stated in paragraphs (a)(1), Offer must submit a written explanation regarding its inability to make the certification. The certification will be considered in connection with a review of the Offeror's responsibility. Failure of the Offeror to furnish additional information as requested by the Procurement Officer may render the Offeror nonresponsible.

(d) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

(e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly or in bad faith rendered an erroneous certification, in addition to other remedies available to the State, the Procurement Officer may terminate the contract resulting from this solicitation for default.

#### CERTIFICATE OF INDEPENDENT PRICE DETERMINATION (MAY 2008)

GIVING FALSE, MISLEADING, OR INCOMPLETE INFORMATION ON THIS CERTIFICATION MAY RENDER YOU SUBJECT TO PROSECUTION UNDER SECTION 16-9-10 OF THE SOUTH CAROLINA CODE OF LAWS AND OTHER APPLICABLE LAWS.

(a) By submitting an offer, the offeror certifies that-

(1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to-

- (i) Those prices;
- (ii) The intention to submit an offer; or
- (iii) The methods or factors used to calculate the prices offered.

(2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and

(3) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit an offer for the purpose of restricting competition.

(b) Each signature on the offer is considered to be a certification by the signatory that the signatory-

(1) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this certification; or

(2)(i) Has been authorized, in writing, to act as agent for the offeror's principals in certifying that those principals have not participated, and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this certification [As used in this subdivision (b)(2)(i), the term "principals" means the person(s) in the offeror's organization responsible for determining the prices offered in this bid or proposal];

(ii) As an authorized agent, does certify that the principals referenced in subdivision (b)(2)(i) of this certification have not participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this certification; and

(iii) As an agent, has not personally participated, and will not participate, in any action contrary to paragraphs (a)(1) through (a)(3) of this certification.

CODE OF LAWS AVAILABLE (JAN 2006): The South Carolina Code of Laws, including the Consolidated Procurement Code, is available at <http://www.scstatehouse.net/code/statmast.htm>. The South Carolina Regulations are available at: <http://www.scstatehouse.net/coderegs/statmast.htm>.

COMPLETION OF FORMS / CORRECTION OF ERRORS (JAN 2006): All prices and notations should be printed in ink or typewritten. Errors should be crossed out, corrections entered and initialed by the person signing the bid. Do not modify the solicitation document itself (including bid schedule). (Applicable only to offers submitted on paper.)

DEADLINE FOR SUBMISSION OF OFFER (JANUARY 2006) Any offer received after the Procurement Officer of the governmental body or his designee has declared that the time set for opening has arrived, shall be rejected unless the offer has been delivered to the designated purchasing office or the governmental bodies' mail room which services that purchasing office prior to the bid opening. [R.19-445.2070(H)]

**DISCLOSURE OF CONFLICTS OF INTEREST OR UNFAIR COMPETITIVE ADVANTAGE (MAY 2011):** You warrant and represent that your offer identifies and explains any unfair competitive advantage you may have in competing for the proposed contract and any actual or potential conflicts of interest that may arise from your participation in this

competition or your receipt of an award. The two underlying principles are (a) preventing the existence of conflicting roles that might bias a contractor's judgment, and (b) preventing an unfair competitive advantage. If you have an unfair competitive advantage or a conflict of interest, the state may withhold award. Before withholding award on these grounds, an offeror will be notified of the concerns and provided a reasonable opportunity to respond. Efforts to avoid or mitigate such concerns, including restrictions on future activities, may be considered.

**DRUG FREE WORK PLACE CERTIFICATION (JANUARY 2006)** By submitting an Offer, Contractor certifies that, if awarded a contract, Contractor will comply with all applicable provisions of The Drug-free Workplace Act, Title 44, Chapter 107 of the South Carolina Code of Laws, as amended.

**DUTY TO INQUIRE (JANUARY 2006)** Offeror, by submitting an Offer, represents that it has read and understands the Solicitation and that its Offer is made in compliance with the Solicitation. Offerors are expected to examine the Solicitation thoroughly and should request an explanation of any ambiguities, discrepancies, errors, omissions, or conflicting statements in the Solicitation. Failure to do so will be at the Offeror's risk. Offeror assumes responsibility for any patent ambiguity in the Solicitation that Offeror does not bring to the State's attention.

**ETHICS CERTIFICATE (May 2008):** By submitting an offer, the offeror certifies that the offeror has and will comply with, and has not, and will not, induce a person to violate Title 8, Chapter 13 of the South Carolina Code of Laws, as amended (ethics act). The following statutes require special attention: Section 8-13-700, regarding use of official position for financial gain; Section 8-13-705, regarding gifts to influence action of public official; Section 8-13-720, regarding offering money for advice or assistance of public official; Sections 8-13-755 and 8-13-760, regarding restrictions on employment by former public official; Section 8-13-775, prohibiting public official with economic interests from acting on contracts; Section 8-13-790, regarding recovery of kickbacks; Section 8-13-1150, regarding statements to be filed by consultants; and Section 8-13-1342, regarding restrictions on contributions by contractor to candidate who participated in awarding of contract. The state may rescind any contract and recover all amounts expended as a result of any action taken in violation of this provision. If contractor participates, directly or indirectly, in the evaluation or award of public contracts, including without limitation, change orders or task orders regarding a public contract, contractor shall, if required by law to file such a statement, provide the statement required by Section 8-13-1150 to the procurement officer at the same time the law requires the statement to be filed. [02-2A075-2]

**IRAN DIVESTMENT ACT- CERTIFICATION (JAN 2015):** (a) The Iran Divestment Act List is a list published by the Board pursuant to Section 11-57-310 that identifies persons engaged in investment activities in Iran. Currently, the list is available at the following URL: <http://procurement.sc.gov/PS/PS-irandivestment.phtm>(.) Section 11-57-310 requires the government to provide a person ninety days written notice before he is included on the list. The following representation, which is required by Section 11-57-330(A), is a material inducement for the State to award a contract to you. (b) By signing your Offer, you certify that, as of the date you sign, you are not on the then-current version of the Iran Divestment Act List. (c) You must notify the Procurement Officer immediately if, at any time before posting of a final statement of award, you are added to the Iran Divestment Act List.

**OMIT TAXES FROM PRICE (JANUARY 2006):** Do not include any sales or use taxes in Your price that the State may be required to pay.

**PROCUREMENT AGENT (AUG 2004)** Authorized Agent. All authority regarding the conduct of this procurement is vested solely with the responsible Procurement Officer. Unless specifically delegated in writing, the Procurement Officer is the only government official authorized to bind the government with regard to this procurement.

**PROTESTS (JUNE 2006)** Any prospective bidder, offeror, contractor, or subcontractor who is aggrieved in connection with the solicitation of a contract shall protest within fifteen days of the date of issuance of the applicable solicitation document at issue. Any actual bidder, offeror, contractor, or subcontractor who is aggrieved in connection with the intended award or award of a contract shall protest within ten days of the date notification of award is posted in accordance with this code. A protest shall be in writing, shall set forth the grounds of the protest and the relief requested with enough particularity to give notice of the issues to be decided, and must be received by the appropriate Chief Procurement Officer within the time provided. See clause entitled "Protest-CPO". [~ 11-35-4210]

**PUBLIC OPENING (JANUARY 2006)** Offers will be publicly opened at the date / time and at the location identified on the Cover Page, or last Amendment, whichever is applicable

**QUESTIONS FROM OFFERORS (JANUARY 2006):** (a) Any prospective offeror desiring an explanation or interpretation of the solicitation, drawings, specifications, etc., must request it in writing. Questions must be received by the Procurement Officer no later than five (5) days prior to opening unless otherwise stated on the Cover Page. Label any communication regarding your questions with the name of the procurement officer, and the solicitation's title and number. Oral explanations or instructions will not be binding. Any information given a prospective offeror concerning a solicitation will

be furnished promptly to all other prospective offerors as an Amendment to the solicitation, if that information is necessary for submitting offers or if the lack of it would be prejudicial to other prospective offerors. (b) The State seeks to permit maximum practicable competition. Offerors are urged to advise the Procurement Officer – as soon as possible – regarding any aspect of this procurement, including any aspect of the Solicitation that unnecessarily or inappropriately limits full and open competition.

**REJECTION/CANCELLATION (JAN 2004)** The State may cancel this solicitation in whole or in part. The State may reject any or all proposals in whole or in part. [SC Code Section 11-35-1710 & R.19-445.2065.]

**RESPONSIVENESS / IMPROPER OFFERS (JANUARY 2006)**

(a) Bid as Specified. Offers for supplies or services other than those specified will not be considered unless authorized by the Solicitation.

(b) Multiple Offers. Offerors may submit more than one Offer, provided that each Offer has significant differences other than price. Each separate Offer must satisfy all Solicitation requirements. If this solicitation is an Invitation for Bids, each separate offer must be submitted as a separate document. If this solicitation is a Request for Proposals, multiple offers may be submitted as one document, provided that you clearly differentiate between each offer and you submit a separate cost proposal for each offer, if applicable.

(c) Responsiveness. Any Offer which fails to conform to the material requirements of the Solicitation may be rejected as nonresponsive. Offers which impose conditions that modify material requirements of the Solicitation may be rejected. If a fixed price is required, an Offer will be rejected if the total possible cost to the State cannot be determined. Offerors will not be given an opportunity to correct any material nonconformity. Any deficiency resulting from a minor informality may be cured or waived at the sole discretion of the Procurement Officer. [R.19-445.2070 and Section 11-35-1520(13)]

(d) Price Reasonableness: Any offer may be rejected if the Procurement Officer determines in writing that it is unreasonable as to price. [R. 19-445.2070].

(e) Unbalanced Bidding. The State may reject an Offer as nonresponsive if the prices bid are materially unbalanced between line items or subline items. A bid is materially unbalanced when it is based on prices significantly less than cost for some work and prices which are significantly overstated in relation to cost for other work, and if there is a reasonable doubt that the bid will result in the lowest overall cost to the State even though it may be the low evaluated bid, or if it is so unbalanced as to be tantamount to allowing an advance payment.

**RESTRICTIONS APPLICABLE TO OFFERORS (JANUARY 2006)** Violation of these restrictions may result in disqualification of your offer, suspension or debarment, and may constitute a violation of the state Ethics Act. (a) After issuance of the solicitation, ***you agree not to discuss this procurement activity in any way with the Using Governmental Unit or its employees, agents or officials.*** All communications must be solely with the Procurement Officer. This restriction may be lifted by express written permission from the Procurement Officer. This restriction expires once a contract has been formed. (b) Unless otherwise approved in writing by the Procurement Officer, ***you agree not to give anything to any Using Governmental Unit***

**SIGNING YOUR OFFER (JANUARY 2006)** Every Offer must be signed by an individual with actual authority to bind the Offeror. (a) If the Offeror is an individual, the Offer must be signed by that individual. If the Offeror is an individual doing business as a firm, the Offer must be submitted in the firm name, signed by the individual, and state that the individual is doing business as a firm. (b) If the Offeror is a partnership, the Offer must be submitted in the partnership name, followed by the words “by its Partner,” and signed by a general partner. (c) If the Offeror is a corporation, the Offer must be submitted in the corporate name, followed by the signature and title of the person authorized to sign. (d) An Offer may be submitted by a joint venturer involving any combination of individuals, partnerships, or corporations. If the Offeror is a joint venture, the Offer must be submitted in the name of the Joint Venture and signed by every participant in the joint venture in the manner prescribed in paragraphs (a) through (c) above for each type of participant. (e) If an Offer is signed by an agent, other than as stated in subparagraphs (a) through (d) above, the Offer must state that it has been signed by an Agent. Upon request, Offeror must provide proof of the agent's authorization to bind the principal.

**STATE OFFICE CLOSINGS (JANUARY 2006)** If an emergency or unanticipated event interrupts normal government processes so that offers cannot be received at the government office designated for receipt of bids by the exact time specified in the solicitation, the time specified for receipt of offers will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal government processes resume. In lieu of an automatic extension, an Amendment may be issued to reschedule bid opening. If state offices are closed at the time a pre-bid or pre-proposal conference is scheduled, an Amendment will be issued to reschedule the conference. Useful information may be available at: [http://www.scemd.org/scgovweb/weather\\_alert.htm](http://www.scemd.org/scgovweb/weather_alert.htm).

**SUBMITTING CONFIDENTIAL INFORMATION (AUG 2002):** (An overview is available at [www.procurement.sc.gov](http://www.procurement.sc.gov)) For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the word "CONFIDENTIAL" every page, or portion thereof, that Offeror contends contains information that is exempt from public disclosure because it is either (a) a trade secret as defined in Section 30-4-40(a)(1), or (b) privileged and confidential, as that phrase is used in Section 11-35-410. For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the words "TRADE SECRET" every page, or portion thereof, that Offeror contends contains a trade secret as that term is defined by Section 39-8-20 of the Trade Secrets Act. For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the word "PROTECTED" every page, or portion thereof, that Offeror contends is protected by Section 11-35-1810. All markings must be conspicuous; use color, bold, underlining, or some other method in order to conspicuously distinguish the mark from the other text. Do not mark your entire response (bid, proposal, quote, etc.) as confidential, trade secret, or protected! If your response, or any part thereof, is improperly marked as confidential or trade secret or protected, the State may, in its sole discretion, determine it nonresponsive. If only portions of a page are subject to some protection, do not mark the entire page. By submitting a response to this solicitation or request, Offeror (1) agrees to the public disclosure of every page of every document regarding this solicitation or request that was submitted at any time prior to entering into a contract (including, but not limited to, documents contained in a response, documents submitted to clarify a response, and documents submitted during negotiations), unless the page is conspicuously marked "TRADE SECRET" or "CONFIDENTIAL" or "PROTECTED", (2) agrees that any information not marked, as required by these bidding instructions, as a "Trade Secret" is not a trade secret as defined by the Trade Secrets Act, and (3) agrees that, notwithstanding any claims or markings otherwise, any prices, commissions, discounts, or other financial figures used to determine the award, as well as the final contract amount, are subject to public disclosure. In determining whether to release documents, the State will detrimentally rely on Offeror's marking of documents, as required by these bidding instructions, as being either "Confidential" or "Trade Secret" or "PROTECTED". By submitting a response, Offeror agrees to defend, indemnify and hold harmless the State of South Carolina, its officers and employees, from every claim, demand, loss, expense, cost, damage or injury, including attorney's fees, arising out of or resulting from the State withholding information that Offeror marked as "confidential" or "trade secret" or "PROTECTED". (All references to S.C. Code of Laws.)

**SUBMITTING YOUR OFFER OR MODIFICATION (JANUARY 2006)** (a) Offers and offer modifications shall be submitted in sealed envelopes or packages (unless submitted by electronic means) – (1) Addressed to the office specified in the Solicitation; and (2) Showing the time and date specified for opening, the solicitation number, and the name and address of the bidder. (b) If you are responding to more than one solicitation, each offer must be submitted in a different envelope or package. (c) Each Offeror must submit the number of copies indicated on the Cover Page. (d) Offerors using commercial carrier services shall ensure that the Offer is addressed and marked on the outermost envelope or wrapper as prescribed in paragraphs (a)(1) and (2) of this provision when delivered to the office specified in the Solicitation. (e) Facsimile or e-mail offers, modifications, or withdrawals, will not be considered unless authorized by the Solicitation. (f) Offers submitted by electronic commerce shall be considered only if the electronic commerce method was specifically stipulated or permitted by the solicitation.

**TAX CREDIT FOR SUBCONTRACTING WITH DISADVANTAGED SMALL BUSINESSES (JAN 2008):** Pursuant to Section 12-6-3350, a taxpayer having a contract with this State who subcontracts with a socially and economically disadvantaged small business is eligible for an income tax credit equal to four percent of the payments to that subcontractor for work pursuant to the contract. The subcontractor must be certified as a socially and economically disadvantaged small business as defined in Section 11-35-5010 and regulations pursuant to it. The credit is limited to a maximum of fifty thousand dollars annually. A taxpayer is eligible to claim the credit for ten consecutive taxable years beginning with the taxable year in which the first payment is made to the subcontractor that qualifies for the credit. After the above ten consecutive taxable years, the taxpayer is no longer eligible for the credit. A taxpayer claiming the credit shall maintain evidence of work performed for the contract by the subcontractor. The credit may be claimed on Form TC-2, "Minority Business Credit." A copy of the subcontractor's certificate from the Governor's Office of Small and Minority Business (OSMBA) is to be attached to the contractor's income tax return. Questions regarding the tax credit and how to file are to be referred to: SC Department of Revenue, Research and Review, Phone: (803) 898-5786, Fax: (803) 898-5888. Questions regarding subcontractor certification are to be referred to: Governor's Office of Small and Minority Business Assistance, Phone: (803) 734-0657, Fax: (803) 734-2498. [02-2A135-1]

**TAXPAYER IDENTIFICATION NUMBER (JANUARY 2006):** (a) If Offeror is owned or controlled by a common parent as defined in paragraph (b) of this provision, Offeror shall submit with its Offer the name and TIN of common parent. (b) Definitions: "Common parent," as used in this provision, means that corporate entity that owns or controls an affiliated group of corporations that files its Federal income tax returns on a consolidated basis, and of which the offeror is a member. "Taxpayer Identification Number (TIN)," as used in this provision, means the number required by the Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The TIN may be either a Social Security Number or an Employer Identification Number. (c) If Offeror does not have a TIN, Offeror shall indicate if either a TIN has been applied for or a TIN is not required. If a TIN is not required, indicate whether (i) Offeror is a nonresident alien, foreign corporation, or foreign partnership that does



not have income effectively connected with the conduct of a trade or business in the United States and does not have an office or place of business or a fiscal paying agent in the United States; (ii) Offeror is an agency or instrumentality of a state or local government; (iii) Offeror is an agency or instrumentality of a foreign government; or (iv) Offeror is an agency or instrumentality of the Federal Government.

**WITHDRAWAL OR CORRECTION OF OFFER (JANUARY 2006)** Offers may be withdrawn by written notice received at any time before the exact time set for opening. If the Solicitation authorizes facsimile offers, offers may be withdrawn via facsimile received at any time before the exact time set for opening. A bid may be withdrawn in person by a bidder or its authorized representative if, before the exact time set for opening, the identity of the person requesting withdrawal is established and the person signs a receipt for the bid. The withdrawal and correction of Offers is governed by S.C. Code Section 11-35-1520 and Regulation 19-445.2085.

## **II. Instructions To Offerors - B. Special Instructions**

### **SUBMISSION OF QUESTIONS**

**Mark envelopes on questions mailed:**

**QUESTIONS: USC-RFP-2816-CJ**

**Title: Provide HVAC Systems Water Treatment Chemicals and Services for USC Upstate**

**Attn.: Charles Johnson**

**QUESTIONS MAY BE E-MAILED TO:**

[Charles.Johnson@sc.edu](mailto:Charles.Johnson@sc.edu)

**FAXED TO:**

**803-777-2032**

### **CLARIFICATION (NOV 2007)**

Pursuant to Section 11-35-1530(6), the Procurement Officer may elect to communicate with you after opening for the purpose of clarifying either your offer or the requirements of the solicitation. Such communications may be conducted only with offerors who have submitted an offer which obviously conforms in all material aspects to the solicitation. Clarification of an offer must be documented in writing and included with the offer. Clarifications may not be used to revise an offer or the solicitation. [Section 11-35-1530(6); R.19-445.2080] [02-2B055-1]

**CONTENTS OF OFFER (RFP) – SPO (JAN 2006):** (a) Offers should be complete and carefully worded and should convey all of the information requested. (b) Offers should be prepared simply and economically, providing a straightforward, concise description of offeror's capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content. (c) Each copy of your offer should be bound in a single volume where practical. All documentation submitted with your offer should be bound in that single volume. (d) If your offer includes any comment over and above the specific information requested in the solicitation, you are to include this information as a separate appendix to your offer. Offers which include either modifications to any of the solicitation's contractual requirements or an offeror's standard terms and conditions may be deemed non-responsive and not considered for award.

**DISCUSSIONS and NEGOTIATIONS (NOV 2007):** Submit your best terms from a cost or price and from a technical standpoint. Your proposal may be evaluated and your offer accepted without any discussions, negotiations, or prior notice. Ordinarily, nonresponsive proposals will be rejected outright. Nevertheless, the State may elect to conduct discussions, including the possibility of limited proposal revisions, but only for those proposals reasonably susceptible of being selected for award. If improper revisions are submitted, the State may elect to consider only your unrevised initial proposal. [11-35-1530(6); R.19-445.2095(I)] The State may also elect to conduct negotiations, beginning with the highest ranked offeror, or seek best and final offers, as provided in Section 11-35-1530(8). If negotiations are conducted, the State may elect to disregard the negotiations and accept your original proposal. [02-2B060-1]

**DISCUSSION WITH OFFERORS:** After opening, the Procurement Officer may, in his sole discretion, initiate discussions with you to discuss your offer. [Section 11-35-1530(6)]

**MAGNETIC MEDIA – REQUIRED FORMAT (JAN 2006):** As noted on the cover page, an original hard copy of your offer must be accompanied by the specified number of copies in the following electronic format: compact disk (CD) in one of the following formats: **CD-R; DVD ROM; DVD-R; or DVD+R**. Formats such as CD-RW, DVD-RAM, DVD-RW, DVD-

+RW, or DVIX **are not acceptable** and will result in the Offeror's proposal being rejected. Every CD must be labeled with offeror's name, solicitation number, and specify whether contents address technical proposal or business proposal. If multiple CD sets are provided, each CD in the set must be appropriately identified as to its relationship to the set, e.g., 1 of 2. Each CD must be identical to the original hard copy. File format shall be MS Word 97 or later.

OPENING PROPOSALS – PRICES NOT DIVULGED (JAN 2006): In competitive sealed proposals, prices will not be divulged at opening. [§ 11-35-1530 & R. 19-445.2095(c) (1)]

PROTEST - CPO - MMO ADDRESS (JUNE 2006)

Any protest must be addressed to the Chief Procurement Officer, Materials Management Office, and submitted in writing (a) by email to protest-mmo@mmo.state.sc.us, (b) by facsimile at 803-737-0639, or (c) by post or delivery to 1201 Main Street, Suite 600, Columbia, SC 29201. [02-2B122-1]

**LEGAL AGREEMENTS INCLUDED WITH BIDS MUST BE CLEARLY LABELLED “SAMPLE”**

**Every page of legal agreement(s) that Offeror expects the University to sign in order to do business with Offeror, Offeror's terms and conditions, and/or similar type legal documents pursuant to potential contract award that Offeror chooses to include with its proposal must be clearly labelled “SAMPLE”. If Offeror's proposal is the highest ranked offer from the evaluation process for the solicitation, then the University will consider the legal documents pursuant to potential contract award that the Offeror included with its proposal and clearly labelled “SAMPLE”.**

**III. Scope of Work / Specifications**

DELIVERY / PERFORMANCE LOCATION – PURCHASE ORDER (JAN 2006): After award, all deliveries shall be made and all services provided to the location specified by the Using Governmental Unit in its purchase order.

**1.0 INTRODUCTION**

USC Upstate is interested in contracting the services of a qualified firm that can provide a complete service-oriented water treatment program. Your company is invited to submit a proposal for the purpose of providing water treatment services and chemical products. Each treatment company who submits a response is expected to meet the qualifications stated below. Offerors will be asked to provide information pertaining to these qualifications and will be evaluated on their responses.

The goal of USC Upstate is to establish a successful water treatment program, which can produce clean heat transfer surfaces with a minimum corrosion rate at a reasonable cost. Since service, including operator training, is an essential aspect of a successful treatment program, consideration will be given to the water treatment company's (offeror's) experience, research capabilities, reputation and the experience of the service personnel who will be dedicated to this program. Price of the chemical program will not be the sole determining factor for the selection of the successful treatment company (contractor).

System specifications and operating conditions provided in the solicitation must be used in making your calculations. Bidder is to provide a Single Monthly Fee that will include all services, products and training as outlined in this solicitation.

This specification will become an integral part of the contract to furnish chemicals and services as described herein.

## **2.0 TREATMENT COMPANY QUALIFICATION**

### **2.1 Company Experience**

The offeror shall be an organization which has had water treatment as its primary business. The offeror must be regionally established in scope and coverage. The offeror should be actively engaged in water treatment research and chemical treatment product development.

### **2.2 Service Representatives**

The contractor must be able to assign a service representative to this contract plus one authorized alternate. All of the service representatives shall be full-time employees of the contractor. Contractor's Reps shall reside within a radius of the greater Spartanburg area in order to provide quick response to emergency calls. The contractor's representatives must be available to USC Upstate on a 24-hour basis and must be capable of physically responding within two hours after contact. The contractor's representatives shall be familiar with all aspects of industrial water treatment and will be required to perform routine testing and monitoring of boilers, condensate systems, softeners, HVAC cooling systems, low conductivity systems, hot water closed loops, and related systems at The USC Upstate site.

USC Upstate requires the contractor's service representatives to have the following minimum requirements:

Education Level: Bachelor of Science in Chemistry, Chemical Engineering or Related Engineering Discipline is preferred, or the equivalent in knowledge, training, skills, education certifications and work experience. **Equivalent knowledge and experience also applies to the ability to conduct/ perform water tests, read and analyze results and make the necessary proper adjustments as water conditions dictate. A legible detailed report from each visit is a requirement and shall highlight any required changes or potential pending problems.**

Water Treatment Work Experience: Contractor's Primary Service Representative - 10 years  
Contractor's Alternate Service Representative - 5 years

The contractor's service representative must be trained in the following areas; HAZCOM, personal protective equipment, respiratory protection, hearing conservation, transporting hazardous materials, Lockout/Tagout, and chemical safety.

In the event that any contractor service representative is terminated from employment, or reassigned, a contractor's replacement representative of equal or superior qualifications shall be offered (via resume) for USC Upstate approval prior to commencing service.

### **2.3 References**

In its proposal, the offeror shall submit a list of five (3) present customers, serviced for at least one year. USC Upstate reserves the right to contact or visit customers so listed. At least two (2) of these references should have cooling towers operating in excess of 300 tons, and chilled water system greater than 1,000 tons.

## **2.4 Service Level and Response Time**

It is desired that all contractor services representatives be permanently housed in the Spartanburg, South Carolina area. A contractor representative shall be able to visit USC Upstate a minimum of twice a month unless otherwise noted in this contract provided at no additional cost. The contractor representatives must be available to USC Upstate on a 24-hour, 7 days per week basis and must be capable of physically responding within two hours after contact. Beeper or mobile cellular phone service must be made available by the contractor.

## **2.5 Health and Safety**

USC Upstate requires that all biocides to be used on property must be registered with the EPA and have an EPA registration number clearly printed on the label. The contractor's service consultants and technicians are required to be trained in the local, state and federal regulations concerning the safe and proper use, storage and disposal of biocides.

All chemicals proposed for use at our facility shall be acceptable for use in Spartanburg, and the State of South Carolina, and must be approved by the Federal Government. Chemicals used for water treatment must comply with all EPA, and DOT requirements, including packaging and labeling.

## **2.6 Material and Safety Data Sheets**

The contractor must be able to provide Material Safety Data Sheets to ensure a safe work environment for USC Upstate personnel and to comply with all state and federal laws concerning the handling of hazardous materials. USC Upstate requires that a Material Safety Data Sheet accompany all first time orders and that the contractor operate a 24-hour, 7 days per week emergency phone number which can be called for emergency information regarding chemical spills and/or accidents involving your products. New Material Safety Data Sheets shall be submitted by the contractor to USC Upstate each time a formulation change is made to a chemical product. All MSDS records will be verified up to date every 3 months and at the renewal of the contract year.

## **2.7 Laboratory Capabilities**

The contractor must have laboratory facilities capable of performing a wide array of analytical work to facilitate monitoring, control, and troubleshooting USC Upstate's systems. All laboratory services shall be provided by the treatment company (contractor) at no additional cost. Subcontracted work or the use of independent laboratories is not allowed. Laboratory services which shall be available include: corrosion coupon analysis, water analysis, scale analysis, resin analysis and metallurgical analysis. A tour of the contractor's analytical, research, and production facilities is required, if requested by USC Upstate. Consulting staff from the contractor's corporate headquarters must be made available for special projects.

## **2.8 Microbiological Testing**

The contractor must have the capability to field test for bacteria and provide results for the plant within 48 hours. Extensive additional Microbiological test for fungi, sulfate-reducers and total aerobic bacteria must be conducted by the contractor on a regular basis

## **2.9 Domestic Water Systems**

To prevent general corrosion and insure the integrity of USC Upstate's domestic water systems for feed water purposes, the successful treatment company (contractor) must have the experience and ability to monitor test and chemically treat these systems as required.

## **2.10 Reagent Capabilities and Test Equipment**

The contractor must be able to provide complete testing and reagent capabilities through its internal equipment/testing organization. The reagents provided will be appropriately labeled, dated to include shelf life or expiration date, and appropriately contained. Contractor's training program, operation and maintenance instructions and procedures shall include use and handling of reagents as well as proper disposal. The contractor as part of this contract will dispose any expired reagents in accordance with Federal, State or local regulations.

All analytical test kits, strips, reagents, scales, glass or plastic ware will be provided by the contractor under the terms of this contract. This includes devices that require calibration for analytical measurements.

## **2.11 Quality Improvement**

USC Upstate is firmly committed to continuously improving the quality of its products and services to its customers.

## **2.12 Program Administration**

Organization is key to a well run water treatment program. In order to have quick access to all technical and safety information regarding the water treatment program, we require that the contractor provide USC Upstate with two (2) operations manuals and a copy on computer disc using Microsoft Word. At the very least, this manual will be indexed and tabbed and must contain an outline of the chemical program to encompass systems prescribed with regards to normal operation, short term shutdown and long term lay-up and shutdown conditions (seasonal and extended maintenance), all chemical control test procedures, Log Sheets, Chemical Analysis Graphs Log (by system), Vendor Product Bulletins, Material Safety Data Sheets, Feed and Control Equipment Specifications and Service Reports and maintenance records.

## **2.13 Product Development and Application Technology**

To insure that USC Upstate is using the safest, most cost effective treatment products and equipment available, the contractor will be required to inform USC Upstate of all new product developments and application technology changes as they occur.

## **2.14 Specialized Analytical and Testing Evaluation Equipment**

The contractor must own and be able to provide boroscope equipment for routine inspections of equipment.

### **2.15 Chemical Deliveries**

All chemicals must be in returnable containers and delivered to the USC Upstate Purchasing Department. Delivery hours are 8:30 am to 3:00 p.m. (typical) and EMERGENCIES- Anytime- at owners request. No drum deliveries will be accepted without agreement from USC Upstate. USC Upstate reserves the right to order quantities as needed.

### **2.16 Subcontractors**

Subcontractors are not to be used in any portion of contractor's service unless expressly approved by USC Upstate

## **3.0 GENERAL REQUIREMENTS AND CONDITIONS**

**Closed Systems tight at present time with the exception of the Hodge Hot water system. There is a construction project underway that required this system to be drained.**

**We are not sure the systems are being treated properly now. We do have a buildup in the open systems piping.**

**The Following chemicals are being used in both the hot and chilled water systems now:**

**Hot Water – Nitrite**

**Chilled Water - Nitrite**

**Cooling Towers – Molybdate, Phosphonate**

**Tonnage of chillers:**

**Hodge 1 - 350 tons**

**Hodge 2 – 450 tons**

**Hodge 3 – 300 tons**

**CASB – 70 tons - Air cooled**

**CLC – 140 tons**

**URC – 136 tons**

**HEC 1 – 300 tons**

**HEC 2 – 261 tons**

**Palmetto House – 202 tons**

**Magnolia House 1 – 140 tons**

**Magnolia House 2 – 140 tons**

**George Dean Johnson Building (see below):**

SCAC-1 85 tons  
SCAC-2 85 tons  
SCAC-1 85 tons

**Makeup water quantity to hot water systems and chilled water systems are not separately metered.**

In addition to the requirements as defined in 2.0 Treatment Company Qualification the **contractor** will be required to meet the general requirements and conditions outlines in this section.

### **3.1 Length of Contract**

The initial contract period will be for one year from the effective date listed on the award document. This contract will automatically extend on each anniversary date unless either party elects to terminate or as otherwise allowed in the contract. The extensions may be less than, but will not exceed four (4) additional one (1) year periods. The length of the Contract shall not exceed a total of five (5) years. If the contractor elects not to extend on the anniversary date, the contractor must notify the University of South Carolina Purchasing Department of its intention in writing at least ninety (90) days prior to the anniversary date of the contract.

### **3.2 Service Costs**

The contractor will be required to provide all normal service and monitoring including special services and process simulation studies if required as part of a Monthly Service Fee. The Expected Treatment Services as described in Subsection 4.10 of Section III of the solicitation is the best estimate available of the service requirements, on a system type basis, at the time this document is issued. Service shall include all expected clerical, overhead, laboratory, delivery and training costs.

#### **3.2.1 Chemical Products**

All chemical products proposed for use at USC Upstate shall be acceptable for use in the State of South Carolina and must be approved by the Federal government. All chemical products shall comply with all EPA and DOT requirements, including packaging and labeling.

#### **3.2.2 Implementation Schedule**

An implementation schedule shall be provided within (4) weeks after contract award. The schedule, developed from site visits, shall identify an expected timetable for service to begin. All site visits during this time period shall be by appointment only.

This schedule will include contractor's training of USC Upstate Personnel, installation of equipment and delivery of chemical, reagents and test equipment, as well as operation manuals identified in this agreement. **There shall be no lapse in USC Upstate's current service.** Contractor shall agree to use all existing chemicals on-site at time of contract award.

## **4.0 SERVICE REQUIREMENTS**

The contractor will be required to meet the service requirements outlines in this section. The following objectives are to be considered as a baseline for chemical treatment service under the duration of this contract.

### **4.1.1. Open Cooling Systems**

The contractor will implement an effective chemical treatment and service program to:

1. Control general corrosion within all open systems to a measurable amount of less than 2.0 mil per year, for carbon and stainless steels. Admiralty and other copper alloys shall be controlled to less than 0.2 mils per year. Corrosion rates shall be measured on site by stand-alone electronic equipment. No coupon sampling shall be permitted.
2. Prevent hardness, silica, or other scale forming deposits in cooling towers heat exchangers or related system components.
3. Control biological and bacterial growths to prevent corrosion and fouling of heat exchangers, cooling towers or related system components. Must have a clearly published company position on Legionella bacteria control.
4. Effectively neutralize, emulsify and or disperse of process fluid contaminants within process cooling systems.

### **4.1.2. Closed Heating, Chilled, and Cooling Systems**

The contractor will implement an effective chemical treatment and service program to:

1. Control general corrosion within all closed systems to a measurable amount of less than 0.5 mils per year for carbon steel, stainless steel, admiralty, and other copper alloys.
2. Control biological and bacterial growth to prevent corrosion and failing of heat exchangers or related system components.

**NOTE: ABSOLUTELY NO FAILURES CAUSED BY IMPROPER WATER TREATMENT WILL BE ALLOWED**

## **4.2. General Service Requirements**

The contractor shall check all equipment upon receipt of contract to determine the status and condition of the equipment and shall provide written preliminary recommendations (cleaning and treating) as part of the required Service Plan and Operations Manual Section 4.4.

The contractor shall continuously examine and evaluate the individual treatment program requirements and make recommendations to USC Upstate representatives.

The individual USC Upstate representatives shall have final approval of the water treatment program for each piece of equipment and upon approval, the contractor shall provide the chemicals and be responsible for the implementation of the program.

A minimum of two (2) visits per month will be required unless directed otherwise by USC Upstate representative. Unless otherwise noted during these visits all treatment program testing inspections and USC Upstate operator monitoring shall be completed in accordance with the



requirements specified in 4.10 Expected Treatment Services contained at the end of this section.

The contractor may be required to setup and maintain a data management control program on a USC Upstate provided computer for our specific water treatment program. This will include the training of USC Upstate personnel on the use and operation of these type programs.

#### **4.3. Service Representatives**

The contractor shall provide to USC Upstate, a minimum of two (2) qualified and approved service representatives to assist in the testing and monitoring of boilers, chilled and hot water closed systems, HVAC cooling towers, and domestic water systems.

The contractor's service representatives are expected to meet the requirements as previously specified in 2.2 Service Representatives.

All of the requirements as specified in 4.10 Expected Services Requirements, at end of this section must be met. Upon completion of testing, an original log of the test results will be given to USC Upstate representative. All recommendations and changes of chemical products, dosages, feed rates or equipment alterations must be reviewed with and approved by USC Upstate representative.

#### **4.4. Service Plan and Operations Manuals**

USC Upstate shall be provided (2) complete sets of individual manuals for Boiler Water, and Cooling Tower, Chilled Water and Hydronic Systems Treatment, and a copy of these documents on computer disk of the service plan and operations manuals using Microsoft Word. This document is to be developed by the contractor from site visits after contract award. Each manual shall address the systems under this contract and shall be updated every review period.

The manual will be indexed and tabbed and shall address and contain the following:

1. Treatment company contacts (telephone and page numbers).
2. Outline of the site chemical program including preliminary recommendations.
3. Chemical control test procedures and parameters.
4. Operator test log.
5. Chemistry Graphs For Each Component Or System
6. Product data and material safety data sheets.
7. Product bulletins.
8. Service reports.

The service plan operations manual shall be reviewed with each operator (and/or his supervisor) in charge of the chemical treatment programs. Upon presentation of this manual, the contractor's service representative shall assess the need of supplemental operator training classes. It is expected that USC Upstate personnel shall be training accordingly.

#### **4.5. Written Service Reports**

The contractor's service representative shall be required to contact USC Upstate representative at the beginning and conclusion of each visit.

Written service reports shall be given to the responsible USC Upstate personnel at the conclusion of each normal site visit. The service reports shall assess the status of the chemical

treatment program, identify any problems and subsequent corrective action required, and clearly indicate the results of all vendor field tests conducted.

#### **4.6. Performance Evaluation and Reviews**

In an effort to assure each chemical treatment program is implemented in a timely manner and is working effectively, performance reviews will be held semi-annually during the term of the contract. The contractor's service representatives shall meet with the designated USC Upstate representatives to present the treatment program's past performance, define and discuss problem areas, implement action plans, and outline the goals and objectives for the next review period. The contractor's service representatives may be requested to be present when chillers, cooling towers and boilers are open for preventive maintenance.

#### **4.7. Operator Training Program**

To insure the success of the treatment program performance objectives, operator training is essential. The contractor shall conduct semi-annual on-site operator training seminars on the aspects of boiler, cooling water, and wastewater treatment. Published manuals and materials must be available for classroom training use. In addition to the formal classroom program, the contractor's field representative shall work with the operators during service visits to demonstrate water analysis technique and confirm operator performance and treatment log reliability.

The contractor shall also provide on-line, self-paced training courses to USC Upstate personnel, with records of student performance and achievement levels.

Following completion of training, copies of the instruction materials, outlines, and lesson plans will be provided by the contractor for reading and refresher of back shift USC Upstate Personnel. All services and training listed in this document shall be provided by the contractor and included in the contractor's price.

The contractor must be able to provide operator training seminars on site. Contractor's training will include HAZCOM, analytical procedures, operating and maintenance procedures required to handle, operate and maintain the chemicals, inventory, injection systems and records for a viable chemical water treatment program. This training will include MSDS, OSHA and EPA requirements.

All contractor training will be conducted following an approved training plan outline or lesson plan including references. Published training manuals, lesson plans and materials must be available for classroom use by USC Upstate personnel for refresher training- outside of normal training intervals.

USC Upstate requires that contractor must have the capability for on-site analysis of energy efficiency. Boiler efficiency, overall chiller efficiency, condenser efficiency, and evaporator efficiency must be able to be performed **by** the contractor on a regular basis.

#### 4.8. Results Assurance

It is expected that application of bidder's program in strict accordance with instructions will result in clean heat transfer surfaces and low corrosion rates. These criteria will be monitored by the contractor and USC Upstate through the use of:

1. Corrosion monitoring with rates not to exceed levels in section 4.1 on mild steel and copper.
2. Chiller efficiency studies utilizing bidders on site computer capability.
3. Laboratory analysis.

Failure of contractor to meet efficiency and corrosion goals will result in immediate contract termination. Ability to monitor these goals is essential.

#### 4.9. Laboratory Service

The contractor shall provide the services of its research laboratories which will be required when necessary to perform a wide array of analytical work to facilitate the monitoring, control and troubleshooting of USC Upstate's systems. All laboratory services shall be provided by the contractor's own research facilities, unless specifically authorized by USC Upstate. The laboratory service turnaround time shall not exceed 21 calendar days from sample pick up time to report delivery.

#### 4.10 Expected Treatment Services

**NOTE:**

All water treatment services and analysis will be performed by the contractor with a USC Upstate Representative responsible for the maintenance and operation of the specific system being sampled, tested, treated or analyzed present.

##### 4.10.1 Open Cooling Systems (when operating)

| <u>Activity</u>   | <u>Frequency</u> |
|---|------------------|
| 1. Conductivity, pH, inhibitor, free chlorine residual testing  | Bi-Weekly        |
| 2. Cooling tower make-up testing  | Bi-Weekly        |
| 3. Biological testing (dip slides)  | Bi-Weekly        |
| 4. Visual inspection of cooling tower   | Bi-Weekly        |
| 5. Check operator controlled water chemistries and log sheets   | monthly          |
| 6. Physical check of treatment equipment (pumps, controllers, timers, injection equipment, water meters, valves and piping) | Bi-Weekly        |
| 7. Check chemical product inventories   | Bi-Weekly        |

|     |  |           |
|-----|--|-----------|
| 8.  | Check corrosion rates  | quarterly |
| 9.  | Visually inspect heat exchangers   | Annually  |
| 10. | Special studies (computer efficiencies, corrotor monitoring, biological optimization, approach temperatures) | Annually  |

#### **4.10.2 Closed Hot Water/Chilled Water Systems**

|    | <u>Activity</u>  | <u>Frequency</u> |
|----|--|------------------|
| 1. | Inhibitor testing (nitrate, pH, conductivity)              | quarterly        |
| 2. | Check operator controlled water chemistries and log sheets | quarterly        |
| 3. | Physical check of treatment equipment and inventories      | quarterly        |
| 4. | Biological testing   | quarterly        |
| 5. | Check corrosion coupons                                    | quarterly        |
| 6. | Special studies (efficiencies, corrosion)                  | As needed        |

### **5.0 CHEMICAL TREATMENT SPECIFICATIONS AND REQUIREMENTS**

The following specifications are intended as requirements for treatment of Boilers, Open Cooling Towers, Closed Heating and Cooling Systems. The items below will become an integral part of the contractor's service objectives after contract award.

#### **5.1 Open Cooling System Product Specifications**

1. All chemicals shall be administered into the system by existing chemical injection feed system at USC Upstate.
2. All chemicals must be in liquid form, unless otherwise approved by USC Upstate.

#### **5.2 Open Cooling Systems Product Types:**

The contractor's treatment program must be comprehensive and shall include the integrated use of scale control agents, dispersants, corrosion inhibitors, pH control agents (only if necessary), and biocides/microbiocides.

1. No heavy metals are acceptable as a tracer in cooling towers.
2. Program shall not use acid or any chemical type concentration that will cause or aggravate tower drift to precipitate any compounds that are harmful to persons or property (such as buildings or automobiles located next to the hospital).

3. Scale control, dispersion, and pH control shall be achieved with use of non-toxic organic compounds and/or polymers and without the supplementary use of acid feed.
4. Corrosion inhibitor(s) shall be non toxic organic compounds. Corrosion protection is provided for all metal surfaces encountered in this tower loop system. Bidder shall guarantee to achieve less than 2.0 MPY (mils per year) metal loss for ferrous, less than 0.2 MPY non ferrous metal and surfaces.
5. Microbiocide: microbiological growth control shall limit formation of algae, slime forming bacteria, molds, fungi, and any biological fouling organisms anywhere within the entire treated open loop cooling water system.
6. Continuous feeding of liquid bromine technology oxidizing microbiocides shall be used in conjunction with slug feeding of non-oxidizing biocides to maintain microbiological activity below 500,000 organisms per milliliter of treated cooling water. The non-oxidizing biocides cannot contain carbonates, heavy metals, be cationic, and be non-foaming. Provide dip slides to monitor effectiveness of biocide treatment in (open systems) at each site on a monthly basis.
7. Dispersant: All organic and designed for removal of microbiological growth or oil.
8. Tower Lay-up: All organic water soluble type corrosion inhibitor.

### **5.3 Closed Heating and Cooling Water Recirculating Systems**

1. No heavy metals are acceptable as a tracer in closed systems.
2. Corrosion inhibitors for ferrous and non ferrous metal with pH buffers to protect all different types of metals in the system. Bidder shall guarantee to achieve less than 0.5 MPY (mils per year) metal loss for non ferrous and for ferrous metals and surfaces.
3. Microbiocide: Non-oxidizing biocides to maintain microbiological activity to zero organisms per milliliter of treated cooling water. The non-oxidizing biocides can not contain carbonates, heavy metals, be cationic, and be non-foaming. Provide dip slides to monitor effectiveness of biocide at each (closed systems) site on a monthly basis.

## **6.0 TREATED SYSTEM SPECIFICATIONS AND OPERATING CONDITIONS**

The University of South Carolina Upstate reserves the right to add additional buildings to the contract at any time during the term of the contract as well as remove (delete) any building from the contract. This shall apply to all listed in Item 6.1.

### **6.1 Heating Hot water Boilers**

| Building:                      | Boiler Size:  | Boiler Information:  |
|--------------------------------|---------------|--|
| Administration                 | 1.44<br>MBTUH | Manf: Lockinvar<br>Natural Gas Fired<br>Installed 2007                       |
| Campus Life Center             | 3.08<br>MBTUH | Manf: Lockinvar<br>Natural Gas Fired<br>Model: CB-N3080<br>Installed in 1994 |
| Health Education Center Boiler |               | Manf: RayPak   |

|                                     |               |  |
|-------------------------------------|---------------|--|
| #1                                  |               | Model: H9-2072B<br>Natural Gas Fired<br>Installed 2008                                 |
| Health Education Center Boiler #2   |               | Manf: RayPak<br>Model: H9-2072B<br>Natural Gas Fired<br>Installed 2008                 |
| Health Education Center Boiler #3   |               | Manf: RayPak<br>Model: H9-2072B<br>Natural Gas Fired<br>Installed 2008                 |
| Health Education Center Boiler #4   |               | Manf: RayPak<br>Model: H9-2072B<br>Natural Gas Fired<br>Installed 2008                 |
| Health Education Center Boiler #5   |               | Manf: RayPak<br>Model: H9-2072B<br>Natural Gas Fired<br>Installed 2008                 |
| Hodge #1                            | 1.43<br>MBTUH | Manf: Weil-McLain<br>Model: WR8-Q-05<br>Natural Gas Fired<br>Installed 1970            |
| Hodge #2                            | 3.55<br>MBTUH | Manf: Cleaver Brooks<br>Model: CBH-200-80<br>Natural Gas Fired<br>Installed 1970       |
| Hodge Arena dehumidification boiler |               | KBN501-M13<br>A14H10289669<br>Lockinvar<br>Installed in 2014                           |
| Humanities and Performing Arts      | 1.90<br>MBTUH | Manf: Weil-McLain<br>Model: CP1726218<br>Natural Gas Fired<br>Installed 1990           |
| Library                             | 1.25<br>MBTUH | Manf: Weil-McLain<br>Model: BGL-1178-WF<br>Natural Gas fired.<br>Installed 1997        |
| Magnolia House #1                   |               | Manf: Weil-McLain<br>Model:<br>Natural Gas Fired<br>Installed 2009                     |
| Magnolia House #2                   |               | Manf: Weil-McLain<br>Model:<br>Natural Gas Fired<br>Installed 2009                     |
| Nursing                             | 1.70<br>MBTUH | Manf: Peabody Gordon Piatt<br>Model: R8.1-G0-07<br>Natural Gas Fired<br>Installed 1980 |
| Palmetto House #1                   | 1.66<br>MBTUH | Manf: Peerless<br>Model: LC-09-W-STD-80PSI<br>Natural Gas Fired<br>Installed 2003      |
| Palmetto House #2                   | 1.66<br>MBTUH | Manf: Peerless<br>Model: LC-09-W-STD-80PSI<br>Natural Gas Fired<br>Installed 2003      |
| Smith                               | 6.28<br>MBTUH | Manf: Cleaver Brooks<br>Model: CB-200-150<br>Natural Gas Fired                         |

|   |               |  |
|---|---------------|--|
|   |               | Installed 1984   |
| University Readiness Center<br>(National Guard) | 2.07<br>MBTUH | Manf: RayPak<br>Model: H9-2072 Serial: 0203192719<br>Natural Gas Fired<br>Installed 2003 |

## SPECIFICATIONS AND OPERATING CONDITIONS

### 6.2 Cooling Towers

#### Hodge Center # 1

|   |             |
|---|-------------|
| Marley Tower, Serial 10062707-B1-NC8405M-12 |             |
| Number of hours per day (average)           | 18 hours    |
| Number of hours per year (average)          | 5,760 hours |
| Normal return water temperature             | 95° F       |
| Normal supply water temperature             | 85° F       |

#### Hodge Center # 2

|  |             |
|--|-------------|
| Marley Tower, Serial NC5211 GM 142112-001-99 |             |
| Number of hours per day (average)            | 18 hours    |
| Number of hours per year (average)           | 5,760 hours |
| Normal return water temperature              | 95° F       |
| Normal supply water temperature              | 85° F       |

#### Hodge Center # 3

|   |             |
|---|-------------|
| Marley Tower, Serial 10062707-A1-NC8405M-12 |             |
| Number of hours per day (average)           | 18 hours    |
| Number of hours per year (average)          | 5,760 hours |
| Normal return water temperature             | 95° F       |
| Normal supply water temperature             | 85° F       |

#### University Readiness Center

|   |            |
|---|------------|
| Marley Tower, Serial NC 8301C1GM NC-224724-A1 |            |
| Number of hours per day (average)             | 20 hours   |
| Number of hours per year (average)            | 7000 hours |
| Normal return water temperature               | 95° F      |
| Normal supply water temperature               | 85° F      |

#### Palmetto House Dorm

|                                       |            |
|---------------------------------------|------------|
| Marley Tower, Serial 239284-P04F-2003 |            |
| Number of hours per day (average)     | 24 hours   |
| Number of hours per year (average)    | 8100 hours |
| Normal return water temperature       | 95° F      |

Normal supply water temperature 85° F

### **Campus Life Center**

Marley Tower, Serial 54277-1/B22158A/4871

Number of hours per day (average) 18 hours  
Number of hours per year (average) 6400 hours  
Normal return water temperature 95° F  
Normal supply water temperature 85° F

### **Health Education Center #1**

Evapco Tower, Serial 7-309593

Number of hours per day (average) 20 hours  
Number of hours per year (average) 7200 hours  
Normal return water temperature 95° F  
Normal supply water temperature 85° F

### **Health Education Center #2**

Evapco Tower, Serial 7-309594

Number of hours per day (average) 20 hours  
Number of hours per year (average) 7200 hours  
Normal return water temperature 95° F  
Normal supply water temperature 85° F

### **Magnolia House Dorm #1**

Marley Tower, Serial 10007992-A1-AV61032B-09

Number of hours per day (average) 24 hours  
Number of hours per year (average) 8100 hours  
Normal return water temperature 95° F  
Normal supply water temperature 85° F

### **Magnolia House Dorm #2**

Marley Tower, Serial 10007992-A1-AV61032B-09

Number of hours per day (average) 24 hours  
Number of hours per year (average) 8100 hours  
Normal return water temperature 95° F  
Normal supply water temperature 85° F

### **George Dean Johnson Business School**

Marley Tower, Model SPX, Serial 3247-496B

Number of hours per day (average) 18 hours



|                                    |            |
|------------------------------------|------------|
| Number of hours per year (average) | 6400 hours |
| Normal return water temperature    | 95° F      |
| Normal supply water temperature    | 85° F      |

### 6.3 Chilled Water Systems,

- Carrier Chiller, Model 23XRV373NQVAA51, Serial Number 0214Q23208 located at the Hodge Building.
- Carrier Chiller, Model 19XR-3-59405, Serial Number 0899J59405 located at the Hodge Building.
- Carrier Chiller, Model 19DK, Serial Number 42847 located at the Hodge Building.
- Carrier Chiller, Model 30RBA0706--0B7-3, Serial Number 0406Q80814 located at the College of Arts & Sciences Building. (Note this is an air cooled chiller – NO TOWER)
- McQuay Chiller, Model WMC145SBS-ER10, Serial Number STNU1010000178 located at the Campus Life Center.
- Carrier Chiller, Model 30HXC136MY661AA, Serial Number 3208Q16316 located at the University Readiness Center.
- Trane Chiller, Model RTHC1B2F01-10C2L3D2LFVQU0D, Serial Number U03D09942 located at the Palmetto House.
- Carrier Chiller, Model 30HXC261RZ661KA, Serial Number 3607Q07819 located at the Health Education Center.
- Carrier Chiller, Model 23XRV4042NRVAA5, Serial Number 74631 located at the Health Education Center.
- McQuay Chiller, Model WMC145DSC-ER10, Serial Number STNU090400001 located at the Magnolia House.
- McQuay Chiller, Model WMC145DSC-ER10, Serial Number STNU090400002 located at the Magnolia House.
- SCAC-1 – Trane Model SCWFR8542MOAP230077001010BCHMA131UF4AS, Serial T09613212 located at the George Dean Johnson School of Business.
- SCAC-2 – Trane Model SCWFR8542MOAP230077001010BCHMA131UF4AS, Serial T09613213 located at the George Dean Johnson School of Business.
- SCAC-3 – Trane Model SCWFR8542MOAP230077001010BCHMA131UF4AS, Serial T09613214 located at the George Dean Johnson School of Business.

#### IV. Information For Offerors To Submit

INFORMATION FOR OFFERORS TO SUBMIT - GENERAL (JAN 2006): Offeror shall submit a signed Cover Page and Page Two. Offeror should submit all other information and documents requested in this part and in parts II.B. Special Instructions; III. Scope of Work; V. Qualifications; VIII. Bidding Schedule/Price Proposal; and any appropriate attachments addressed in section IX. Attachments to Solicitations.

#### **PROPOSAL CONTENTS**

**Offerors shall submit all information and documents required here or elsewhere in this solicitation,**

To be considered for award, all proposals should include, as a minimum, the following information. **All information should be presented in the order listed. Offerors should restate each item below and provide their response to that item immediately thereafter.**

1. **Service Costs**

Offeror shall propose a **Single Monthly Fee** to provide all services, products and training required in this solicitation. The contractor will be required to provide all normal service and monitoring including special services and process simulation studies if required as part of the Monthly Fee. The Expected Treatment Services as described in item 4.10 of SubSection 4.0 Service Requirements of Section III of the solicitation is the best estimate available of the service requirements, on a system type basis, at the time the solicitation is issued. Service shall include all expected clerical, overhead, laboratory, delivery and training costs.

**Single Monthly Fee:** \$\_\_\_\_\_

2. **Company Experience**

A. Offeror is to provide a brief overview of its organization, explaining how it has provided water treatment as its primary business, refer to Item 2.1 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation.

B. In addition to the above, submit the following information:

- Business name
- Address
- Contact person
- Phone number
- Email address
- Number of full-time service employees
- Number of years in Business providing water treatment as its primary business
- Enclose a copy of firm's annual report or equivalent

3. **Service Representatives**

Identify Primary and Alternate Service Representative bidder will assign to this contract as stated in Item 2.2 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation. Provide the following for each **service** representative:

A. **Primary Service Representative:**

- Name: \_\_\_\_\_
- Address: \_\_\_\_\_
- Phone Number: \_\_\_\_\_
- School Attended: \_\_\_\_\_
- Years Attended: \_\_\_\_\_
- Degree Obtained: \_\_\_\_\_

- Full Time Employee of Bidder: \_\_\_\_\_ Yes \_\_\_\_\_ No
- Verification of Safety Training: \_\_\_\_\_ Yes \_\_\_\_\_ No  
Documentation of training from a company training / educational program must be included with your submittal.
- Verification of Safety Manual & Regulations: \_\_\_\_\_ Yes \_\_\_\_\_ No  
Copies of the company's safety manual and regulations will be provided with Bid.
- Verification of Qualifications: \_\_\_\_\_ Yes \_\_\_\_\_ No  
Provide Resume detailing experience and qualifications required to perform duties as required in this bid.

**B. Alternate Service Representative:**

- Name: \_\_\_\_\_
- Address: \_\_\_\_\_
- Phone Number: \_\_\_\_\_
- School Attended: \_\_\_\_\_
- Years Attended: \_\_\_\_\_
- Degree Obtained: \_\_\_\_\_
- Full Time Employee of Bidder: \_\_\_\_\_ Yes \_\_\_\_\_ No
- Verification of Safety Training: \_\_\_\_\_ Yes \_\_\_\_\_ No  
Documentation of training from a company training / educational program must be included with your submittal.
- Verification of Safety Manual & Regulations: \_\_\_\_\_ Yes \_\_\_\_\_ No  
Copies of the company's safety manual and regulations will be provided with Bid.
- Verification of Qualifications: \_\_\_\_\_ Yes \_\_\_\_\_ No  
Provide Resume detailing experience and qualifications required to perform duties as required in this bid.

4. **References**

Bidder is to submit a list of five (5) present customers they have serviced for at least one year. Refer to Item 2.3 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation. For each reference submit at a minimum the following information:

- Reference Name
- Address
- Contact Person
- Phone Number
- Email Address
- Brief description of services provided for reference

5. **Service Level and Response Time** - Please list examples of 24-hour coverage and emergency response available. Refer to Item 2.4 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation.

6. **Health and Safety**

Bidder shall provide a response that he has read item 2.5 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation, understands and will comply.

7. **Material and Safety Data Sheets**  
Provide a summary of your Material Safety Data Sheet program; include your emergency phone number and a sample copy of your firm's Material Safety Data Sheet. Refer to Item 2.6 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation.
8. **Laboratory Capabilities**  
Include sample analytical reports as evidence of your firm's laboratory capabilities. Refer to Item 2.7 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation.
9. **Microbiological Testing**  
Please submit a summary of your firm's capability in this area and sample test reports. Refer to Item 2.8 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation.
10. **Domestic Water Systems**  
Please submit a summary of your firm's capability and experience in this area. Refer to Item 2.9 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation.
11. **Reagent Capabilities and Test Equipment**  
Bidder shall provide a response that he has read item 2.10 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation, understands and will comply.
12. **Quality Improvement**  
Please provide a summary of your own company's continuous Quality Improvement Program. Include an outline of the quality education, which your firm's employees receive. Refer to Item 2.11 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation.
13. **Program Administration**  
Bidder shall provide a response that he has read item 2.12 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation, understands and will comply.
14. **Product Development and Application Technology**  
Bidder shall provide a response that he has read item 2.13 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation, understands and will comply.
15. **Specialized Analytical and Testing Evaluation Equipment**  
Please provide evidence of use and ownership of this equipment. Refer to Item 2.14 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation.
16. **Chemical Deliveries**  
Bidder shall provide a response that he has read item 2.15 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation, understands and will comply.
17. **Subcontractors**  
Subcontractors are not to be used in any portion of your service unless expressly approved by USC Upstate. Bidder shall provide a response that he has read item 2.16 of Subsection 2.0 Treatment Company Qualification of Section III of the solicitation, understands and will comply.
18. **Training**  
As stated in Item 4.7 Operator Training of SubSection 4.0 Service Requirements of Section III of the solicitation, please provide a summary of the training your firm can provide to USC Upstate. This training should include, but is not limited to, how to perform tests and monitor

chemical program results, how to work safely with chemical products, and general training regarding boiler, cooling, and chiller systems. Samples of published training materials should be included with your bid.

19. **On-Site Analysis**

USC Upstate requires that water treatment companies must have the capability for on-site analysis of energy efficiency. Boiler efficiency, overall chiller efficiency, condenser efficiency, and evaporator efficiency must be able to be performed on a regular basis. Please submit a summary of your firm's capability in this area.

20. Bidder shall provide a response that he has read all the items in the following SubSections of Section III of the Solicitation and understands and will comply:

- 3.0 GENERAL REQUIREMENTS AND CONDITIONS
- 4.0 SERVICE REQUIREMENTS
- 5.0 CHEMICAL TREATMENT SPECIFICATIONS AND REQUIREMENTS
- 6.0 TREATED SYSTEM SPECIFICATIONS AND OPERATING CONDITIONS

**MINORITY PARTICIPATION (JAN 2006)**

Is the bidder a South Carolina Certified Minority Business?  Yes  NO

Is the bidder a Minority Business certified by another governmental entity?  Yes  NO

If so, please list the certifying governmental entity: \_\_\_\_\_

Will any of the work under this contract be performed by a SC certified Minority Business as a subcontractor?  Yes  NO

If so, what percentage of the total value of the contract will be performed by a SC certified Minority Business as a subcontractor?  Yes  NO

Will any of the work under this contract be performed by a minority business certified by another governmental entity as a subcontractor?  Yes  NO

If so, what percentage of the total value of the contract will be performed by a minority business certified by another governmental entity as a subcontractor?  Yes  NO

If a certified Minority Business is participating in this contract, please indicate all categories for which the Business is certified:

- Traditional minority
- Traditional minority, but female
- Women (Caucasian females)
- Hispanic minorities
- DOT referral (Traditional minority)
- DOT referral (Caucasian female)
- Temporary certification
- SBA 8 (a) certification referral
- Other minorities (Native American, Asian, etc.)

(If more than one minority contractor will be utilized in the performance of this contract, please provide the information above for each minority business.)

**OFFSHORE CONTRACTING (JAN 2006)**

Work that will be performed offshore by the Offeror and/or its subcontractors must be identified in the Offeror's response. For the purpose of this solicitation, offshore is defined as outside the 50 States and US territories. Offeror is to include an explanation for the following:

(a) What type of work is being contracted offshore?  
\_\_\_\_\_

(b) What percentage (%) of the total work is being contracted offshore?  
\_\_\_\_\_

(c) What percentage (%) of the total value of the contract is being contracted offshore?  
\_\_\_\_\_

(d) Provide a Service Level Agreement (SLA) demonstrating the arrangement between the off-shore contactor and the Offeror. Attach Service Level Agreement to this document or paste here. Data provided by the Offeror in regards to this clause is for information only and will not be used in the evaluation and determination of an award.

**SUBMITTING REDACTED OFFERS (FEB 2007):** You are required to mark the original copy of your offer to identify any information that is exempt from public disclosure. You must do so in accordance with the clause entitled "Submitting Confidential Information." In addition, you must also submit one complete copy of your offer from which you have removed any information that you marked as exempt, i.e., a redacted copy. The information redacted should mirror in ever detail the information marked as exempt from public disclosure. The redacted copy should (i) reflect the same pagination as the original, (ii) show the empty space from which information was redacted, and (iii) be submitted on magnetic media. (See clause entitled "Magnetic Media Required Format.") Except for the redacted information, the CD must be identical to the original hard copy. Portable Document Format (.pdf) is preferred. [04-4030-1]

## V. Qualifications

**QUALIFICATION OF OFFEROR (JAN 2006)** To be eligible for award of a contract, a prospective contractor must be responsible. In evaluating an Offeror's responsibility, the State Standards of Responsibility [R.19-445.2125] and information from any other source may be considered. An Offeror must, upon request of the State, furnish satisfactory evidence of its ability to meet all contractual requirements. Unreasonable failure to supply information promptly in connection with a responsibility inquiry may be grounds for determining that you are ineligible to receive an award. S.C. Code Section 11-35-1810.

**SUBCONTRACTOR – IDENTIFICATION (JAN 2006):** If you intend to subcontract with another business for any portion of the work and that portion exceeds 10% of your price, your offer must identify that business and the portion of work which they are to perform. Identify potential subcontractors by providing the business' name, address, phone, taxpayer identification number, and point of contact. In determining your responsibility, the state may evaluate your proposed subcontractors.

## VI. Award Criteria

**AWARD CRITERIA – PROPOSALS (JANUARY 2006):** Award will be made to the highest ranked, responsive and responsible offeror whose offer is determined to be the most advantageous to the State.

**EVALUATIONS FACTORS – PROPOSALS (JANUARY 2006):** Offers will be evaluated using only the factors stated below. Evaluation factors are stated in the relative order of importance, with the first factor being the most important. Once evaluation is complete, all responsive offerors will be ranked from most advantageous to least advantageous. In accordance with Sections 11-35-1530(5), Cost will not be used as an initial evaluation factor. Issues of Cost will be negotiated as outlined in Section 11-35-1530(8).

- A. **Technicians Qualifications and Experience** – Item 3. Service Representatives in Section IV. Information for Offerors to Submit of the solicitation.
- B. **Service Response Time** – Item 5. Service Level and Response Time in Section IV. Information for Offerors to Submit of the solicitation.
- C. **Testing Capabilities On and Off Site** – Items 8. Laboratory Capabilities, 9. Microbiological Testing, 15. Specialized Analytical and Testing Evaluation Equipment, and 19. On-Site Analysis in Section IV. Information for Offerors to Submit of the solicitation.
- D. **References** – Item 4. References in Section IV. Information for Offerors to Submit **of the solicitation.**
- E. **Service Approach / Company Background** - Items 2. Company Experience, 7. Material and Safety Data Sheets, 10. Domestic Water Systems, 12. Quality Improvement, and 18. Training in Section IV. Information for Offerors to Submit of the solicitation.

**NEGOTIATIONS (JANUARY 2006):** The Procurement Officer may elect to make an award without conducting negotiations. However, after the offers have been ranked, the Procurement Officer may elect to negotiate price or the general scope of work with the highest ranked offeror. If a satisfactory agreement cannot be reached, negotiations may be

conducted with the second, and then the third, and so on, ranked offerors to such level of ranking as determined by the Procurement Officer.

**COMPETITION FROM PUBLIC ENTITIES (JAN 2006):** If a South Carolina governmental entity submits an offer, the Procurement Officer will, when determining the lowest offer, add to the price provided in any offers submitted by non-governmental entities a percentage equivalent to any applicable sales or use tax. S.C. Code Ann. Regs 117-304.1 (Supp. 2004).

## **VII. Terms and Conditions - A. General**

**ASSIGNMENT (JAN 2006):** No contract or its provisions may be assigned, sublet, or transferred without the written consent of the Procurement Officer.

**BANKRUPTCY (JAN 2006):** (a) Notice. In the event the Contractor enters into proceedings relating to bankruptcy, whether voluntary or involuntary, the Contractor agrees to furnish written notification of the bankruptcy to the Using Governmental Unit. This notification shall be furnished within five (5) days of the initiation of the proceedings relating to the bankruptcy filing. This notification shall include the date on which the bankruptcy petition was filed, the identity of the court in which the bankruptcy petition was filed, and a listing of all State contracts against which final payment has not been made. This obligation remains in effect until final payment under this Contract. (b) Termination. This contract is voidable and subject to immediate termination by the State upon the contractor's insolvency, including the filing of proceedings in bankruptcy.

**CHOICE-OF-LAW (JAN 2006):** The Agreement, any dispute, claim, or controversy relating to the Agreement, and all the rights and obligations of the parties shall, in all respects, be interpreted, construed, enforced and governed by and under the laws of the State of South Carolina, except its choice of law rules. As used in this paragraph, the term "Agreement" means any transaction or agreement arising out of, relating to, or contemplated by the solicitation.

**CONTRACT DOCUMENTS & ORDER OF PRECEDENCE (JAN 2006):** (a) Any contract resulting from this solicitation shall consist of the following documents: (1) a Record of Negotiations, if any, executed by you and the Procurement Officer, (2) documentation regarding the clarification of an offer [e.g., 11-35-1520(8) or 11-35-1530(6)], if applicable, (3) the solicitation, as amended, (4) modifications, if any, to your offer, if accepted by the Procurement Officer, (5) your offer, (6) any statement reflecting the state's final acceptance (a/k/a "award"), and (7) purchase orders. These documents shall be read to be consistent and complimentary. Any conflict among these documents shall be resolved by giving priority to these documents in the order listed above. (b) The terms and conditions of documents (1) through (6) above shall apply notwithstanding any additional or different terms and conditions in either (i) a purchase order or other instrument submitted by the State or (ii) any invoice or other document submitted by Contractor. Except as otherwise allowed herein, the terms and conditions of all such documents shall be void and of no effect. (c) No contract, license, or other agreement containing contractual terms and conditions will be signed by any Using Governmental Unit. Any document signed or otherwise agreed to by persons other than the Procurement Officer shall be void and of no effect.

### **DISCOUNT FOR PROMPT PAYMENT (JAN 2006)**

(a) Discounts for prompt payment will not be considered in the evaluation of offers. However, any offered discount will form a part of the award, and will be taken if payment is made within the discount period indicated in the offer by the offeror. As an alternative to offering a discount for prompt payment in conjunction with the offer, offerors awarded contracts may include discounts for prompt payment on individual invoices.

(b) In connection with any discount offered for prompt payment, time shall be computed from the date of the invoice. If the Contractor has not placed a date on the invoice, the due date shall be calculated from the date the designated billing office receives a proper invoice, provided the state annotates such invoice with the date of receipt at the time of receipt. For the purpose of computing the discount earned, payment shall be considered to have been made on the date that appears on the payment check or, for an electronic funds transfer, the specified payment date. When the discount date falls on a Saturday, Sunday, or legal holiday when Federal Government offices are closed and Government business is not expected to be conducted, payment may be made on the following business day.

**DISPUTES (JAN 2006):** (1) Choice-of-Forum. All disputes, claims, or controversies relating to the Agreement shall be resolved exclusively by the appropriate Chief Procurement Officer in accordance with Title 11, Chapter 35, Article 17 of the South Carolina Code of Laws, or in the absence of jurisdiction, only in the Court of Common Pleas for, or a federal court located in, Richland County, State of South Carolina. Contractor agrees that any act by the Government regarding the Agreement is not a waiver of either the Government's sovereign immunity or the Government's immunity under the Eleventh Amendment of the United State's Constitution. As used in this paragraph, the term "Agreement" means any transaction or agreement arising out of, relating to, or contemplated by the solicitation. (2) Service of Process. Contractor

consents that any papers, notices, or process necessary or proper for the initiation or continuation of any disputes, claims, or controversies relating to the Agreement; for any court action in connection therewith; or for the entry of judgment on any award made, may be served on Contractor by certified mail (return receipt requested) addressed to Contractor at the address provided as the Notice Address on Page Two or by personal service or by any other manner that is permitted by law, in or outside South Carolina. Notice by certified mail is deemed duly given upon deposit in the United States mail.

**EQUAL OPPORTUNITY (JAN 2006):** Contractor is referred to and shall comply with all applicable provisions, if any, of Title 41, Part 60 of the Code of Federal Regulations, including but not limited to Sections 60-1.4, 60-4.2, 60-4.3, 60-250.5(a), and 60-741.5(a), which are hereby incorporated by reference.

**FALSE CLAIMS (JAN 2006):** According to the S.C. Code of Laws § 16-13-240, "a person who by false pretense or representation obtains the signature of a person to a written instrument or obtains from another person any chattel, money, valuable security, or other property, real or personal, with intent to cheat and defraud a person of that property is guilty" of a crime.

**FIXED PRICING REQUIRED (JAN 2006):** Any pricing provided by contractor shall include all costs for performing the work associated with that price. Except as otherwise provided in this solicitation, contractor's price shall be fixed for the duration of this contract, including option terms. This clause does not prohibit contractor from offering lower pricing after award.

**IRAN DIVESTMENT ACT - ONGOING OBLIGATIONS - (JAN 2015):** (a) You must notify the procurement officer immediately if, at any time during the contract term, you are added to the Iran Divestment Act List. (b) Consistent with Section 11-57-330(8), you shall not contract with any person to perform a part of the Work, if, at the time you enter into the subcontract, that person is on the then-current version of the Iran Divestment Act List.

**NON-INDEMNIFICATION (JAN 2006):** Any term or condition is void to the extent it requires the State to indemnify anyone.

**NOTICE (JAN 2006):** (A) After award, any notices shall be in writing and shall be deemed duly given (1) upon actual delivery, if delivery is by hand, (2) upon receipt by the transmitting party of automated confirmation or answer back from the recipient's device if delivery is by telex, telegram, facsimile, or electronic mail, or (3) upon deposit into the United States mail, if postage is prepaid, a return receipt is requested, and either registered or certified mail is used. (B) Notice to contractor shall be to the address identified as the Notice Address on Page Two. Notice to the state shall be to the Procurement Officer's address on the Cover Page. Either party may designate a different address for notice by giving notice in accordance with this paragraph.

**PAYMENT & INTEREST (MAY 2011):** (a) Unless otherwise provided in this Solicitation, the State shall pay the Contractor, after the submission of proper invoices or vouchers, the prices stipulated in this contract for supplies delivered and accepted or services rendered and accepted, less any deductions provided in this contract. Unless otherwise specified herein, including the purchase order, payment shall not be made on partial deliveries accepted by the Government. (b) Unless otherwise provided herein, including the purchase order, payment will be made by check. (c) Notwithstanding any other provision, payment shall be made in accordance with S.C. Code Section 11-35-45, which provides the Contractor's exclusive means of recovering any type of interest from the Owner. Contractor waives imposition of an interest penalty unless the invoice submitted specifies that the late penalty is applicable. Except as set forth in this paragraph, the State shall not be liable for the payment of interest on any debt or claim arising out of or related to this contract for any reason. (d) Amounts due to the State shall bear interest at the rate of interest established by the South Carolina Comptroller General pursuant to Section 11-35-45 ("an amount not to exceed fifteen percent each year"), as amended. (e) Any other basis for interest, including but not limited to general (pre- and post-judgment) or specific interest statutes, including S.C. Code Ann. § 34-31-20, are expressly waived by both parties. If a court, despite this agreement and waiver, requires that interest be paid on any debt by either party other than as provided by items (c) and (d) above, the parties further agree that the applicable interest rate for any given calendar year shall be the lowest prime rate as listed in the first edition of the Wall Street Journal published for each year, applied as simple interest without compounding.

**PUBLICITY (JAN 2006):** Contractor shall not publish any comments or quotes by State employees, or include the State in either news releases or a published list of customers, without the prior written approval of the Procurement Officer.

**PURCHASE ORDERS (JAN 2006):** Contractor shall not perform any work prior to the receipt of a purchase order from the using governmental unit. The using governmental unit shall order any supplies or services to be furnished under this contract by issuing a purchase order. Purchase orders may be used to elect any options available under this contract, e.g., quantity, item, delivery date, payment method, but are subject to all terms and conditions of this contract. Purchase orders may be electronic. No particular form is required. An order placed pursuant to the purchasing card provision qualifies as a purchase order.



SETOFF (JAN 2006): The state shall have all of its common law, equitable, and statutory rights of set-off. These rights shall include, but not be limited to, the State's option to withhold for the purposes of set-off any moneys due to the Contractor under this contract up to any amounts due and owing to the state with regard to this contract, any other contract with any state department or agency, including any contract for a term commencing prior to the term of this contract, plus any amounts due and owing to the state for any other reason including, without limitation, tax delinquencies, fee delinquencies or monetary penalties relative thereto.

SURVIVAL OF OBLIGATIONS (JAN 2006): The Parties' rights and obligations which, by their nature, would continue beyond the termination, cancellation, rejection, or expiration of this contract shall survive such termination, cancellation, rejection, or expiration, including, but not limited to, the rights and obligations created by the following clauses: Indemnification - Third Party Claims, Intellectual Property Indemnification, and any provisions regarding warranty or audit.

TAXES (JAN 2006): Any tax the contractor may be required to collect or pay upon the sale, use or delivery of the products shall be paid by the State, and such sums shall be due and payable to the contractor upon acceptance. Any personal property taxes levied after delivery shall be paid by the State. It shall be solely the State's obligation, after payment to contractor, to challenge the applicability of any tax by negotiation with, or action against, the taxing authority. Contractor agrees to refund any tax collected, which is subsequently determined not to be proper and for which a refund has been paid to contractor by the taxing authority. In the event that the contractor fails to pay, or delays in paying, to any taxing authorities, sums paid by the State to contractor, contractor shall be liable to the State for any loss (such as the assessment of additional interest) caused by virtue of this failure or delay. Taxes based on Contractor's net income or assets shall be the sole responsibility of the contractor.

TERMINATION DUE TO UNAVAILABILITY OF FUNDS (JAN 2006): Payment and performance obligations for succeeding fiscal periods shall be subject to the availability and appropriation of funds therefor. When funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal period, the contract shall be canceled. In the event of a cancellation pursuant to this paragraph, contractor will be reimbursed the resulting unamortized, reasonably incurred, nonrecurring costs. Contractor will not be reimbursed any costs amortized beyond the initial contract term.

THIRD PARTY BENEFICIARY (JAN 2006): This Contract is made solely and specifically among and for the benefit of the parties hereto, and their respective successors and assigns, and no other person will have any rights, interest, or claims hereunder or be entitled to any benefits under or on account of this Contract as a third party beneficiary or otherwise.

WAIVER (JAN 2006): The State does not waive any prior or subsequent breach of the terms of the Contract by making payments on the Contract, by failing to terminate the Contract for lack of performance, or by failing to strictly or promptly insist upon any term of the Contract. Only the Procurement Officer has actual authority to waive any of the State's rights under this Contract. Any waiver must be in writing.

## **VII. Terms and Conditions - B. Special**

**HIPAA LAW:** The Contractor agrees that to the extent that some or all of the activities within the scope of this Contract are subject to the Health Insurance Portability Accountability Act of 1996, P.L. 104-91, as amended ("HIPAA"), or its implementing regulations, it will comply with the HIPAA requirements and will execute such agreements and practices as the University of South Carolina may require to ensure compliance. Additional information may be viewed at: <http://www.sc.edu/hipaa/>

**PROTECTION OF HUMAN HEALTH AND THE ENVIRONMENT** - The University of South Carolina requires that all contractual activities to be in compliance with local, state and federal mandates concerning "protection of human health and the environment". In addition, the University of South Carolina is a "Drug Free Work Place" and requires all contractors to comply with South Carolina Code of Laws Section 41-15-10 ET sequence (1976 w/amendments). Any contractor doing business with the University will be required to document compliance with these mandates and to furnish specific information requested by the University's Department of Environmental Health and Safety when notified to do so. The Contractor understands and agrees that jobsites are open at all times work is being performed by the Contractor to authorized University employees who have been trained to identify unsafe work conditions. The Contractor will immediately correct any deficiencies noted by these inspections when requested by the University's Department of Environmental Health and Safety to do so. In work areas where a specific hazard is posed which includes but is not limited to lead paint and asbestos abatement projects, Contractors will be required to produce Lead Compliance Plans and Asbestos

Project Designs which outline their method of work prior to the start of work. Each contractor shall designate a responsible member of the Contractor's organization to be at the site whose duty shall be the prevention of accidents. By submission of this bid, the vendor agrees to take all necessary steps to insure compliance with the requirements outlined above.

**CHANGES (JAN 2006):**

(1) Contract Modification. By a written order, at any time, and without notice to any surety, the Procurement Officer may, subject to all appropriate adjustments, make changes within the general scope of this contract in any one or more of the following:

- (a) drawings, designs, or specifications, if the supplies to be furnished are to be specially manufactured for the [State] in accordance therewith;
- (b) method of shipment or packing;
- (c) place of delivery;
- (d) description of services to be performed;
- (e) time of performance (i.e., hours of the day, days of the week, etc.); or,
- (f) place of performance of the services.

Subparagraphs (a) to (c) apply only if supplies are furnished under this contract. Subparagraphs (d) to (f) apply only if services are performed under this contract.

(2) Adjustments of Price or Time for Performance. If any such change increases or decreases the contractor's cost of, or the time required for, performance of any part of the work under this contract, whether or not changed by the order, an adjustment shall be made in the contract price, the delivery schedule, or both, and the contract modified in writing accordingly. Any adjustment in contract price made pursuant to this clause shall be determined in accordance with the Price Adjustment Clause of this contract. Failure of the parties to agree to an adjustment shall not excuse the contractor from proceeding with the contract as changed, provided that the State promptly and duly make such provisional adjustments in payment or time for performance as may be reasonable. By proceeding with the work, the contractor shall not be deemed to have prejudiced any claim for additional compensation, or an extension of time for completion.

(3) Time Period for Claim. Within 30 days after receipt of a written contract modification under Paragraph (1) of this clause, unless such period is extended by the Procurement Officer in writing, the contractor shall file notice of intent to assert a claim for an adjustment. Later notification shall not bar the contractor's claim unless the State is prejudiced by the delay in notification.

(4) Claim Barred After Final Payment. No claim by the contractor for an adjustment hereunder shall be allowed if notice is not given prior to final payment under this contract.

**COMPLIANCE WITH LAWS (JAN 2006):** During the term of the contract, contractor shall comply with all applicable provisions of laws, codes, ordinances, rules, regulations, and tariffs.

**CONTRACTOR'S LIABILITY INSURANCE (MAR 2013):** (a) Contractor shall procure from a company or companies lawfully authorized to do business in South Carolina and with a current A.M. Best rating of no less than A: VII; and maintain for the duration of the contract, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work and the results of that work by the contractor, his agents, representatives, employees or subcontractors. (b) Coverage shall be at least as broad as:

(1) Commercial General Liability (GCL): Insurance Services Office (ISO) Form CG 00 01 12 07 covering GCL on an "occurrence" basis, including products-completed operations, personal and advertising injury, with limits no less than \$1,000,000 per occurrence. If a general aggregate limit applies, the general aggregate limit shall be twice the required occurrence limit. This contract shall be considered to be an "insured contract" as defined in the policy.

(2) Auto Liability: ISO Form Number CA 00 01 covering any auto (Code 1), or if Contractor has no owned autos, hired, (Code 8) and non-owned autos (Code 9), with limits no less than \$1,000,000 per accident for bodily injury and property damage.

(3) Worker's Compensation: As required by the State of South Carolina, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease.

(b) Every applicable Using Governmental Unit, and the officers, officials, employees and volunteers of any of them, must be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Contractor including materials, parts or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Contractor's insurance at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10 and CG 20 37 if a later edition is used.

(c) For any claims related to this contract, the Contractor's insurance coverage shall be primary insurance as respects the State, every applicable Using Governmental Unit, and the officers, officials, employees and volunteers of any of them. Any insurance or self-insurance maintained by the State, every applicable Using Governmental Unit, or the officers, officials, employees and volunteers of any of them, shall be excess of the Contractor's insurance and shall not contribute with it.

(d) Prior to commencement of the work, the Contractor shall furnish the State with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this section. All certificates are to be received and approved by the State before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Contractor's obligation to provide them. The State reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by this section, at any time.

(e) Should any of the above described policies be cancelled before the expiration date thereof, notice will be delivered in accordance with the policy provisions. In addition, the Contractor shall notify the State immediately upon receiving any information that any of the coverages required by this section are or will be changed, cancelled, or replaced.

(f) Contractor hereby grants to the State and every applicable Using Governmental Unit a waiver of any right to subrogation which any insurer of said Contractor may acquire against the State or applicable Using Governmental Unit by virtue of the payment of any loss under such insurance. Contractor agrees to obtain any endorsement that may be necessary to effect this waiver of subrogation, but this provision applies regardless of whether or not the State or Using Governmental Unit has received a waiver of subrogation endorsement from the insurer.

(g) Any deductibles or self-insured retentions must be declared to and approved by the State. The State may require the Contractor to purchase coverage with a lower deductible or retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

(h) The State reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

**Insurance Requirement: The successful offeror must provide a copy of its Liability Insurance certificate within ten (10) days upon the posting of the intent to award statement or statement of award and on each anniversary date thereafter attesting to such insurance coverage.**

CONTRACTOR PERSONNEL (JAN 2006): The Contractor shall enforce strict discipline and good order among the Contractor's employees and other persons carrying out the Contract. The Contractor shall not permit employment of unfit persons or persons not skilled in tasks assigned to them.

CONTRACTOR'S OBLIGATION – GENERAL (JAN 2006): The contractor shall provide and pay for all materials, tools, equipment, labor and professional and non-professional services, and shall perform all other acts and supply all other things necessary, to fully and properly perform and complete the work. The contractor must act as the prime contractor and assume full responsibility for any subcontractor's performance. The contractor will be considered the sole point of contact with regard to all situations, including payment of all charges and the meeting of all other requirements.

CONTRACTOR'S USE OF STATE PROPERTY (JAN 2006): Upon termination of the contract for any reason, the State shall have the right, upon demand, to obtain access to, and possession of, all State properties, including, but not limited to, current copies of all State application programs and necessary documentation, all data, files, intermediate materials and supplies held by the contractor. Contractor shall not use, reproduce, distribute, display, or sell any data, material, or documentation owned exclusively by the State without the State's written consent, except to the extent necessary to carry out the work.

DEFAULT (JAN 2006):

(a)(1) The State may, subject to paragraphs (c) and (d) of this clause, by written notice of default to the Contractor, terminate this contract in whole or in part if the Contractor fails to-

(i) Deliver the supplies or to perform the services within the time specified in this contract or any extension;

(ii) Make progress, so as to endanger performance of this contract (but see paragraph (a)(2) of this clause); or

(iii) Perform any of the other material provisions of this contract (but see paragraph (a)(2) of this clause).

(2) The State's right to terminate this contract under subdivisions (a)(1)(ii) and (1)(iii) of this clause, may be exercised if the Contractor does not cure such failure within 10 days (or more if authorized in writing by the Procurement Officer) after receipt of the notice from the Procurement Officer specifying the failure.

(b) If the State terminates this contract in whole or in part, it may acquire, under the terms and in the manner the Procurement Officer considers appropriate, supplies or services similar to those terminated, and the Contractor will be liable to the State for any excess costs for those supplies or services. However, the Contractor shall continue the work not terminated.

(c) Except for defaults of subcontractors at any tier, the Contractor shall not be liable for any excess costs if the failure to perform the contract arises from causes beyond the control and without the fault or negligence of the Contractor. Examples of such causes include (1) acts of God or of the public enemy, (2) acts of the State in either its sovereign or contractual capacity, (3) fires, (4) floods, (5) epidemics, (6) quarantine restrictions, (7) strikes, (8) freight embargoes, and (9) unusually severe weather. In each instance the failure to perform must be beyond the control and without the fault or negligence of the Contractor.

(d) If the failure to perform is caused by the default of a subcontractor at any tier, and if the cause of the default is beyond the control of both the Contractor and subcontractor, and without the fault or negligence of either, the Contractor shall not be liable for any excess costs for failure to perform, unless the subcontracted supplies or services were obtainable from other sources in sufficient time for the Contractor to meet the required delivery schedule.

(e) If this contract is terminated for default, the State may require the Contractor to transfer title and deliver to the State, as directed by the Procurement Officer, any (1) completed supplies, and (2) partially completed supplies and materials, parts, tools, dies, jigs, fixtures, plans, drawings, information, and contract rights (collectively referred to as "manufacturing materials" in this clause) that the Contractor has specifically produced or acquired for the terminated portion of this contract. Upon direction of the Procurement Officer, the Contractor shall also protect and preserve property in its possession in which the State has an interest.

(f) The State shall pay contract price for completed supplies delivered and accepted. The Contractor and Procurement Officer shall agree on the amount of payment for manufacturing materials delivered and accepted and for the protection and preservation of the property; if the parties fail to agree, the Procurement Officer shall set an amount subject to the Contractor's rights under the Disputes clause. Failure to agree will be a dispute under the Disputes clause. The State may withhold from these amounts any sum the Procurement Officer determines to be necessary to protect the State against loss because of outstanding liens or claims of former lien holders.

(g) If, after termination, it is determined that the Contractor was not in default, or that the default was excusable, the rights and obligations of the parties shall, if the contract contains a clause providing for termination for convenience of the State, be the same as if the termination had been issued for the convenience of the State. If, in the foregoing circumstances, this contract does not contain a clause providing for termination for convenience of the State, the contract shall be adjusted to compensate for such termination and the contract modified accordingly subject to the contractor's rights under the Disputes clause.

(h) The rights and remedies of the State in this clause are in addition to any other rights and remedies provided by law or under this contract.

#### INDEMNIFICATION -- THIRD PARTY CLAIMS (NOV 2011)

Notwithstanding any limitation in this agreement, and to the fullest extent permitted by law, Contractor shall defend and hold harmless Indemnitees for and against any and all suits or claims of any character (and all related damages, settlement payments, attorneys' fees, costs, expenses, losses or liabilities) by a third party which are attributable to bodily injury, sickness, disease or death, or to injury to or destruction of tangible property arising out of or in connection with the goods or services acquired hereunder or caused in whole or in part by any act or omission of contractor, its subcontractors, their employees, workmen, servants, agents, or anyone directly or indirectly employed by them or anyone for whose acts any of them may be liable, regardless of whether or not caused in part by an Indemnitee, and whether or not such claims are made by a third party or an Indemnitee; however, if an Indemnitee's negligent act or omission is subsequently determined to be the sole proximate cause of a suit or claim, the Indemnitee shall not be entitled to indemnification hereunder. Contractor shall be given timely written notice of any suit or claim. Contractor's obligations hereunder are in no way limited by any protection afforded under workers' compensation acts, disability benefits acts, or other employee benefit acts. This clause

shall not negate, abridge, or reduce any other rights or obligations of indemnity which would otherwise exist. The obligations of this paragraph shall survive termination, cancelation, or expiration of the parties' agreement. This provision shall be construed fairly and reasonably, neither strongly for nor against either party, and without regard to any clause regarding insurance. As used in this clause, "Indemnitees" means the State of South Carolina, its instrumentalities, agencies, departments, boards, political subdivisions and all their respective officers, agents and employees. [07-7B100-2]

#### **ILLEGAL IMMIGRATION (NOV. 2008)**

(An overview is available at [www.procurement.sc.gov](http://www.procurement.sc.gov)) By signing your offer, you certify that you will comply with the applicable requirements of Title 8, Chapter 14 of the South Carolina Code of Laws and agree to provide to the State upon request any documentation required to establish either: (a) that Title 8, Chapter 14 is inapplicable to you and your subcontractors or sub-subcontractors; or (b) that you and your subcontractors or sub-subcontractors are in compliance with Title 8, Chapter 14. Pursuant to Section 8-14-60, "A person who knowingly makes or files any false, fictitious, or fraudulent document, statement, or report pursuant to this chapter is guilty of a felony, and, upon conviction, must be fined within the discretion of the court or imprisoned for not more than five years, or both." You agree to include in any contracts with your subcontractors language requiring your subcontractors to (a) comply with the applicable requirements of Title 8, Chapter 14, and (b) include in their contracts with the sub-subcontractors language requiring the sub-subcontractors to comply with the applicable requirements of Title 8, Chapter 14. [07-7B097-1]

**LICENSES AND PERMITS (JAN 2006):** During the term of the contract, the Contractor shall be responsible for obtaining, and maintaining in good standing, all licenses (including professional licenses, if any), permits, inspections and related fees for each or any such licenses, permits and /or inspections required by the State, county, city or other government entity or unit to accomplish the work specified in this solicitation and the contract.

**OWNERSHIP OF DATA & MATERIALS (JAN 2006):** All data, material and documentation either prepared for the state pursuant to this contract shall belong exclusively to the State.

**PRICE ADJUSTMENTS (JAN 2006):** (1) Method of Adjustment. Any adjustment in the contract price made pursuant to a clause in this contract shall be consistent with this Contract and shall be arrived at through whichever one of the following ways is the most valid approximation of the actual cost to the Contractor (including profit, if otherwise allowed):

(a) by agreement on a fixed price adjustment before commencement of the pertinent performance or as soon thereafter as practicable;

(b) by unit prices specified in the Contract or subsequently agreed upon;

(c) by the costs attributable to the event or situation covered by the relevant clause, including profit if otherwise allowed, all as specified in the Contract; or subsequently agreed upon;

(d) in such other manner as the parties may mutually agree; or,

(e) in the absence of agreement by the parties, through a unilateral initial written determination by the Procurement Officer of the costs attributable to the event or situation covered by the clause, including profit if otherwise allowed, all as computed by the Procurement Officer in accordance with generally accepted accounting principles, subject to the provisions of Title 11, Chapter 35, Article 17 of the S.C. Code of Laws.

(2) Submission of Price or Cost Data. Upon request of the Procurement Officer, the contractor shall provide reasonably available factual information to substantiate that the price or cost offered, for any price adjustments is reasonable, consistent with the provisions of Section 11-35-1830.

**PRICE ADJUSTMENT - LIMITED - AFTER INITIAL TERM ONLY (JAN 2006):** Upon approval of the Procurement Officer, prices may be adjusted for any renewal term. Prices shall not be increased during the initial term. Any request for a price increase must be received by the Procurement Officer at least ninety (90) days prior to the expiration of the applicable term and must be accompanied by sufficient documentation to justify the increase. If approved, a price increase becomes effective starting with the term beginning after approval. A price increase must be executed as a change order. Contractor may terminate this contract at the end of the then current term if a price increase request is denied. Notice of termination pursuant to this paragraph must be received by the Procurement Officer no later than fifteen (15) days after the Procurement Officer sends contractor notice rejecting the requested price increase.

**PRICE ADJUSTMENTS – LIMITED BY CPI “All Items” (JAN 2006):** Upon request and adequate justification, the Procurement Officer may grant a price increase up to, but not to exceed, the unadjusted percent change for the most recent 12 months for which data is available, that is not subject to revision, in the Consumer Price Index (CPI) for all urban consumers (CPI-U), “all items” for services, as determined by the Procurement Officer. The Bureau of Labor and Statistics publishes this information on the web at [www.bls.gov](http://www.bls.gov).

PRICING DATA – AUDIT – INSPECTION (JAN 2006) [Clause Included Pursuant to § 11-35-1830, - 2210, & -2220] (a) Cost or Pricing Data. Upon Procurement Officer's request, you shall submit cost or pricing data, as defined by 48 C.F.R. § 2.101 (2004), prior to either (1) any award to contractor pursuant to 11-35-1530 or 11-35-1560, if the total contract price exceeds \$500,000, or (2) execution of a change order or contract modification with contractor which exceeds \$100,000. Your price, including profit or fee, shall be adjusted to exclude any significant sums by which the state finds that such price was increased because you furnished cost or pricing data that was inaccurate, incomplete, or not current as of the date agreed upon between parties. (b) Records Retention. You shall maintain your records for three years from the date of final payment, or longer if requested by the chief Procurement Officer. The state may audit your records at reasonable times and places. As used in this subparagraph (b), the term "records" means any books or records that relate to cost or pricing data submitted pursuant to this clause. In addition to the obligation stated in this subparagraph (b), you shall retain all records and allow any audits provided for by 11-35-2220(2). (c) Inspection. At reasonable times, the state may inspect any part of your place of business which is related to performance of the work. (d) Instructions – Certification. When you submit data pursuant to subparagraph (a), you shall (1) do so in accordance with the instructions appearing in Table 15-2 of 48 C.F.R. § 15.408 (2004) (adapted as necessary for the state context), and (2) submit a Certificate of Current Cost or Pricing Data, as prescribed by 48 CFR § 15.406-2(a) (adapted as necessary for the state context). (e) Subcontracts. You shall include the above text of this clause in all of your subcontracts. (f) Nothing in this clause limits any other rights of the state.

RELATIONSHIP OF THE PARTIES (JAN 2006): Neither party is an employee, agent, partner, or joint venturer of the other. Neither party has the right or ability to bind the other to any agreement with a third party or to incur any obligation or liability on behalf of the other party.

TERM OF CONTRACT – EFFECTIVE DATE / INITIAL CONTRACT PERIOD (JAN 2006): The effective date of this contract is the first day of the Maximum Contract Period as specified on the final statement of award. The initial term of this agreement is one year from the effective date. Regardless, this contract expires no later than the last date stated on the final statement of award.

TERM OF CONTRACT - OPTION TO RENEW: (a) At the end of the initial term, and at the end of each renewal term, this contract shall automatically renew for a period of one year, unless contractor/University receives written notice that the University/contractor elects not to renew the contract at least ninety (90) days prior to the date of renewal. Regardless, this contract expires no later than the last date stated on the final statement of award. (b) Contractor acknowledges that, unless excused by Section 11-57-320, if the contractor is on the then-current Iran Divestment Act List as of the date of any contract renewal, the renewal will be void ab initio.

TERMINATION FOR CONVENIENCE (JAN 2006): (1) Termination. The Procurement Officer may terminate this contract in whole or in part, for the convenience of the State. The Procurement Officer shall give written notice of the termination to the contractor specifying the part of the contract terminated and when termination becomes effective.

(2) Contractor's Obligations. The contractor shall incur no further obligations in connection with the terminated work and on the date set in the notice of termination the contractor will stop work to the extent specified. The contractor shall also terminate outstanding orders and subcontracts as they relate to the terminated work. The contractor shall settle the liabilities and claims arising out of the termination of subcontracts and orders connected with the terminated work. The Procurement Officer may direct the contractor to assign the contractor's right, title, and interest under terminated orders or subcontracts to the State. The contractor must still complete the work not terminated by the notice of termination and may incur obligations as are necessary to do so.

(3) Right to Supplies. The Procurement Officer may require the contractor to transfer title and deliver to the State in the manner and to the extent directed by the Procurement Officer: (a) any completed supplies; and (b) such partially completed supplies and materials, parts, tools, dies, jigs, fixtures, plans,

25 drawings, information, and contract rights (hereinafter called "manufacturing material") as the contractor has specifically produced or specially acquired for the performance of the terminated part of this contract. The contractor shall, upon direction of the Procurement Officer, protect and preserve property in the possession of the contractor in which the State has an interest. If the Procurement Officer does not exercise this right, the contractor shall use best efforts to sell such supplies and manufacturing materials in a accordance with the standards of Uniform Commercial Code Section 2-706. Utilization of this Section in no way implies that the State has breached the contract by exercise of the Termination for Convenience Clause.

(4) Compensation. (a) The contractor shall submit a termination claim specifying the amounts due because of the termination for convenience together with cost or pricing data required by Section 11-35-1830 bearing on such claim. If the contractor fails to file a termination claim within one year from

the effective date of termination, the Procurement Officer may pay the contractor, if at all, an amount set in accordance with Subparagraph (c) of this Paragraph.

(b) The Procurement Officer and the contractor may agree to a settlement and that the settlement does not exceed the total contract price plus settlement costs reduced by payments previously made by the State, the proceeds of any sales of supplies and manufacturing materials under Paragraph (3) of this clause, and the contract price of the work not terminated;

(c) Absent complete agreement under Subparagraph (b) of this Paragraph, the Procurement Officer shall pay the contractor the following amounts, provided payments agreed to under Subparagraph (b) shall not duplicate payments under this Subparagraph:

(i) contract prices for supplies or services accepted under the contract;

(ii) costs reasonably incurred in performing the terminated portion of the work less amounts paid or to be paid for accepted supplies or services;

(iii) reasonable costs of settling and paying claims arising out of the termination of subcontracts or orders pursuant to Paragraph (2) of this clause. These costs must not include costs paid in accordance with Subparagraph (c)(ii) of this paragraph;

(iv) any other reasonable costs that have resulted from the termination. The total sum to be paid the contractor under this Subparagraph shall not exceed the total contract price plus the reasonable settlement costs of the contractor reduced by the amount of payments otherwise made, the proceeds of any sales of supplies and manufacturing materials under Subparagraph (b) of this Paragraph, and the contract price of work not terminated.

(d) Contractor must demonstrate any costs claimed, agreed to, or established under Subparagraphs (b) and (c) of this Paragraph using its standard record keeping system, provided such system is consistent with any applicable Generally Accepted Accounting Principles.

(5) Contractor's failure to include an appropriate termination for convenience clause in any subcontract shall not (i) affect the state's right to require the termination of a subcontract, or (ii) increase the obligation of the state beyond what it would have been if the subcontract had contained an appropriate clause.

## **VIII. BIDDING SCHEDULE / PRICE-BUSINESS PROPOSAL**

**Please refer to Item 1. Service Costs of the Proposal Contents clause in Section IV. Information for Offerors to Submit of the solicitation.**

## IX. ATTACHMENTS TO SOLICITATION

### IMPORTANT TAX NOTICE - NONRESIDENTS ONLY

Withholding Requirements for Payments to Nonresidents: Section 12-8-550 of the South Carolina Code of Laws requires persons hiring or contracting with a nonresident conducting a business or performing personal services of a temporary nature within South Carolina to withhold 2% of each payment made to the nonresident. The withholding requirement does not apply to (1) payments on purchase orders for tangible personal property when the payments are not accompanied by services to be performed in South Carolina, (2) nonresidents who are not conducting business in South Carolina, (3) nonresidents for contracts that do not exceed \$10,000 in a calendar year, or (4) payments to a nonresident who (a) registers with either the S.C. Department of Revenue or the S.C. Secretary of State and (b) submits a Nonresident Taxpayer Registration Affidavit - Income Tax Withholding, Form I-312 to the person letting the contract.

The withholding requirement applies to every governmental entity that uses a contract ("Using Entity"). Nonresidents should submit a separate copy of the Nonresident Taxpayer Registration Affidavit - Income Tax Withholding, Form I-312 to every Using Entity that makes payment to the nonresident pursuant to this solicitation. Once submitted, an affidavit is valid for all contracts between the nonresident and the Using Entity, unless the Using Entity receives notice from the Department of Revenue that the exemption from withholding has been revoked.

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Section 12-8-540 requires persons making payment to a nonresident taxpayer of rentals or royalties at a rate of \$1,200.00 or more a year for the use of or for the privilege of using property in South Carolina to withhold 7% of the total of each payment made to a nonresident taxpayer who is not a corporation and 5% if the payment is made to a corporation. Contact the Department of Revenue for any applicable exceptions.

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For information about other withholding requirements (e.g., employee withholding), contact the Withholding Section at the South Carolina Department of Revenue at 803-898-5383 or visit the Department's website at [www.sctax.org](http://www.sctax.org).

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This notice is for informational purposes only. This agency does not administer and has no authority over tax issues. All registration questions should be directed to the License and Registration Section at 803-898-5872 or to the South Carolina Department of Revenue, Registration Unit, Columbia, S.C. 29214-0140. All withholding questions should be directed to the Withholding Section at 803-898-5383.





STATE OF SOUTH CAROLINA  
 DEPARTMENT OF REVENUE  
**NONRESIDENT TAXPAYER  
 REGISTRATION AFFIDAVIT  
 INCOME TAX WITHHOLDING**

**I-312**  
 (Rev. 5/7/04)  
 3323

The undersigned nonresident taxpayer on oath, being first duly sworn, hereby certifies as follows:

1. Name of Nonresident Taxpayer: \_\_\_\_\_
2. Trade Name, if applicable (Doing Business As): \_\_\_\_\_
3. Mailing Address: \_\_\_\_\_
4. Federal Identification Number: \_\_\_\_\_
5. Hiring or Contracting with: \_\_\_\_\_
- Name: \_\_\_\_\_
- Address: \_\_\_\_\_
- Receiving Rentals or Royalties From: \_\_\_\_\_
- Name: \_\_\_\_\_
- Address: \_\_\_\_\_
- Beneficiary of Trusts and Estates: \_\_\_\_\_
- Name: \_\_\_\_\_
- Address: \_\_\_\_\_

6. I hereby certify that the above named nonresident taxpayer is currently registered with  
**(check the appropriate box):**  
 The South Carolina Secretary of State or  
 The South Carolina Department of Revenue

Date of Registration: \_\_\_\_\_

7. I understand that by this registration, the above named nonresident taxpayer has agreed to be subject to the jurisdiction of the South Carolina Department of Revenue and the courts of South Carolina to determine its South Carolina tax liability, including estimated taxes, together with any related interest and penalties.

8. I understand the South Carolina Department of Revenue may revoke the withholding exemption granted under Code Sections 12-8-540 (rentals), 12-8-550 (temporarily doing business or professional services in South Carolina), and 12-8-570 (distributions to nonresident beneficiary by trusts or estates) at any time it determines that the above named nonresident taxpayer is not cooperating with the Department in the determination of its correct South Carolina tax liability.

The undersigned understands that any false statement contained herein could be punished by fine, imprisonment or both.

Recognizing that I am subject to the criminal penalties under Code Section 12-54-44 (B) (6) (a) (i), I declare that I have examined this affidavit and to the best of my knowledge and belief, it is true, correct and complete.

(Seal) \_\_\_\_\_

Signature of Nonresident Taxpayer (Owner, Partner or Corporate Officer, when relevant) \_\_\_\_\_ Date \_\_\_\_\_

If Corporate officer state title: \_\_\_\_\_

\_\_\_\_\_  
 (Name - Please Print)

**Mail to:** The company or individual you are contracting with.

# OFFEROR'S CHECKLIST

## *AVOID COMMON BID/PROPOSAL MISTAKES*

Review this checklist prior to submitting your bid/proposal.  
If you fail to follow this checklist, you risk having your bid/proposal rejected.

- DO NOT INCLUDE ANY OF YOUR STANDARD CONTRACT FORMS!
- UNLESS EXPRESSLY REQUIRED, DO NOT INCLUDE ANY ADDITIONAL BOILERPLATE CONTRACT CLAUSES.
- REREAD YOUR ENTIRE BID/PROPOSAL TO MAKE SURE YOUR BID/PROPOSAL DOES NOT TAKE EXCEPTION TO ANY OF THE STATE'S MANDATORY REQUIREMENTS.
- MAKE SURE YOU HAVE PROPERLY MARKED ALL PROTECTED, CONFIDENTIAL, OR TRADE SECRET INFORMATION IN ACCORDANCE WITH THE INSTRUCTIONS ENTITLED: SUBMITTING CONFIDENTIAL INFORMATION. ***DO NOT MARK YOUR ENTIRE BID/PROPOSAL AS CONFIDENTIAL, TRADE SECRET, OR PROTECTED! DO NOT INCLUDE A LEGEND ON THE COVER STATING THAT YOUR ENTIRE RESPONSE IS NOT TO BE RELEASED!***
- HAVE YOU PROPERLY ACKNOWLEDGED ALL AMENDMENTS? INSTRUCTIONS REGARDING HOW TO ACKNOWLEDGE AN AMENDMENT SHOULD APPEAR IN ALL AMENDMENTS ISSUED.
- MAKE SURE YOUR BID/PROPOSAL INCLUDES A COPY OF THE SOLICITATION COVER PAGE. MAKE SURE THE COVER PAGE IS SIGNED BY A PERSON THAT IS AUTHORIZED TO CONTRACTUALLY BIND YOUR BUSINESS.
- MAKE SURE YOUR BID/PROPOSAL INCLUDES THE NUMBER OF COPIES REQUESTED.
- CHECK TO ENSURE YOUR BID/PROPOSAL INCLUDES EVERYTHING REQUESTED!
- IF YOU HAVE CONCERNS ABOUT THE SOLICITATION, DO NOT RAISE THOSE CONCERNS IN YOUR RESPONSE! **AFTER OPENING, IT IS TOO LATE! IF THIS SOLICITATION INCLUDES A PRE-BID/PROPOSAL CONFERENCE OR A QUESTION & ANSWER PERIOD, RAISE YOUR QUESTIONS AS A PART OF THAT PROCESS!** PLEASE SEE INSTRUCTIONS UNDER THE HEADING "SUBMISSION OF QUESTIONS" AND ANY PROVISIONS REGARDING PRE-BID/PROPOSAL CONFERENCES.

This checklist is included only as a reminder to help offerors avoid common mistakes.  
Responsiveness will be evaluated against the solicitation, not against this checklist.  
You do not need to return this checklist with your response.