

**Department of Materials Management
Division of Procurement
MONTGOMERY COUNTY PUBLIC SCHOOLS
45 West Gude Drive, Suite 3100
Rockville, Maryland**

**INVITATION FOR BID #9159.7
DOOR AND WINDOW REPLACEMENTS**

GENERAL CONDITIONS AND SPECIFICATIONS

I. GENERAL CONDITIONS

A. SCOPE

The work includes providing all labor, materials, accessories and related services necessary for the removal, disposal, and complete installation of doors, windows, frames, and accessories as required to make projects complete in all detail and in compliance with Montgomery County Public Schools (MCPS) specifications and manufacturer's installation instructions. The pre-qualified contractor(s) will be required to visit various locations throughout MCPS and take measurements to develop proposals for individual projects.

B. INTENT

1. It is the intention of this bid to pre-qualify multiple contractors who possess, the capability, equipment and workforce to perform replacement and servicing of building components identified herein and will be required to submit proposals based on specifications herein and scope provided for various locations as requested by MCPS. Proposals shall include all inclusive cost to fully cover all required materials, equipment and labor for removal, furnishing and installation of metal and wood doors and frames, aluminum, steel and fiberglass windows and all related accessories, as specified herein. The awarded unit prices will be used for the purposes of determining award and for change orders due to unforeseen changes during ongoing projects.

It is anticipated that the majority of the work under this contract will be performed during the summer when students are not in the building during **June, July and August**. However, some projects will require work to be performed while schools are in session requiring the Contractor to work on weekend, holidays and/or evenings, utilizing the overtime rates provided. Therefore, the successful Contractor(s) must verify to MCPS satisfaction that they have the ability to perform as specified if awarded a contract. **Successful Contractor will be required to submit the Asbestos Free Verification Form as applicable and required herein. See General Conditions Section K and APPENDIX G.**

2. **Bid prices offered shall be all inclusive, including but not limited to labor, equipment and miscellaneous materials to satisfy all specification requirements. All costs shall be included in the bid prices submitted.** All work shall be performed in accordance with the latest applicable laws, codes, and regulations of the various regulatory bodies of the State of Maryland, Federal/Local Governments, and all other boards or departments having jurisdiction. These regulations and standards will be further considered a part of these

specifications and conditions. The Contractor shall furnish and install any additional items required by the same, whether or not particularly shown or specified. Any items or requirements noted herein in excess of code requirements and permitted under the code shall take preference.

C. **AWARD**

1. This solicitation does not commit MCPS to award any contract or to pay any costs incurred in the preparation of a response. It is the intention to award this contract to the bidder(s) submitting the most favorable unit prices (regular and overtime) with consideration being given to any previous performance for the Board of Education as to quality of service and acceptable merchandise, and with regard to the bidder's ability to perform should it be awarded the contract. However, the Board of Education reserves the right to make awards according to the best interest of MCP. **Awards are contingent upon availability of funds.**

In addition, the Board reserves the right to remove or add additional items to the specifications as our requirements change, as well as add suppliers/vendors throughout the contract term should a need arise that cannot be provided by any of the awarded contractor(s).

2. Wherever the term "provide" is used, it shall mean, "furnish and install in place, complete in all details".

D. **SITE INSPECTION**

The pre-qualified contractor(s) will be required to inspect the work sites, take measurements and develop proposals. The Contractor must report to the main office to contact the building service manager prior to inspection. When proposal has been submitted, it shall be understood that the work site has been inspected and that the Contractor is aware of the needs and conditions under which the work is to be accomplished.

After inspection, the contractor shall report to the MCPS project coordinator any conditions that might prevent them from performing their work in the manner intended. Failure to do so will not relieve the successful contractor of the obligation to furnish all materials and labor necessary to fully carry out the provisions of the contract.

E. **SCHEDULE**

1. **Completion dates shall be identified on each contractor's proposal.** A purchase order issued and signed by the director of the Department of Material Management will be the Contractor's authorization to proceed with an approved proposal. All work is to be totally completed on or before the stated completion date identified and accepted on each proposal. This includes but is not limited to, final inspections by MCPS staff, all cleaning task, punch-out work, etc. Late charges will be deducted for failure to meet any target dates without an MCPS approved extension. **(See "Late Charges for Failure to Complete on Time" under Contract Administration.)**

2. Normal Work Periods

Work may be performed upon the school administrator's approval on regular school days. These hours are **Monday through Friday, 6:00 A.M. through 7:00 P.M.** (MCPS building services staff are normally on site during these hours).

3. The contractor shall take into consideration that when performing their work school activities may be taking place (summer school, special activities, etc.) No work performed by the contractor shall disrupt normal school functions. Any traffic blockages, utility outages, etc., which may be required in the execution of the contractor's work shall be scheduled with the MCPS, project coordinator and will require the contractor to perform such work at premium labor rates.

4. The contractor shall maintain an adequate labor force on the work site from the start of the project until the completion in order to satisfy the schedule. MCPS expects the work to proceed uninterrupted with regard to labor and material availability. The contractor shall inventory materials as they are received from the manufacturer and not wait until work is under way to determine if inventory is sufficient.

F. CONTRACT TERM

The term of contract shall be for one (1) year as stipulated on the Invitation For Bid. However, the contract may not begin until one day after approval by the Board of Education and will conclude as stated under the contract term. MCPS reserves the right to extend this contract at existing prices, terms and conditions for up to four (4) additional one-year terms. Written notice indicating MCPS' intention to pursue the extension of the contract will be issued to the successful contractor ninety days prior to the expiration of the original contract. The bidder will have ten days from date of notification to return the notice acknowledging its intent to accept or reject the extension. Once all responses are evaluated, MCPS staff may make a recommendation to the Board of Education to extend the contract or decide to re-bid. If the contract is extended by the Board of Education, a contract amendment will be issued.

G. QUANTITIES

MCPS is not obligated to purchase any specific quantity. Annual estimated quantities identified on the Quotation Form are subject to change up or down and purchases are dependent upon the requirements of MCPS and on budgetary limitations. Orders will be placed from time to time throughout the contract term.

H. PROVISION FOR PRICE ADJUSTMENT

Price increases will not be considered for the first 180 days of the contract. Thereafter, the successful vender must submit a written request for price relief. The request for a price increase shall include documentation from the manufacturer to verify the basis for such request. MCPS reserves the right to accept or reject the request as may be determined to be in the best interest of MCPS. Any orders received prior to a request for the price increase shall be honored at the original contract price.

Subsequent to award, the unit price on equipment quoted herein is subject to price adjustment upward or downward in accordance with increases or decreases announced by the manufacturer. The successful bidder must notify the Director of the Division of Procurement, of any announced manufacturer's price reductions and give immediate benefit to MCPS in a proportionate amount.

I. MCPS EMERGENCY/CRISIS PROCEDURES, SHELTER/LOCKDOWN

Emergency/ Crisis Procedure Information

1. In the event of an emergency/crisis incident while working in an MCPS facility, the Contractor and/or their representative(s) shall be required to adhere to the established MCPS procedures and school administrative guidelines during such an occurrence.
2. Supplied herein under **APPENDIX D**, for the contractor's information are the MCPS Emergency/Crisis Procedures, Shelter/Lockdown. It is the contractors responsibility to familiarize themselves and their representative(s) regarding the Shelter/Lockdown Procedures. These procedures are subject to change to meet MCPS requirements.
3. The contractor shall have at the work site, a reasonable amount of materials that will allow them to quickly secure the work area and/or secure building as required for the type of work being performed.

J. WARRANTY/SERVICES/REPAIRS

1. The specifications require that all workmanship and materials shall be warranty/guarantee for two years. Final payment will be made once the installation is completed and accepted by MCPS. The warranty shall begin from the date the MCPS Project Coordinator approved and signed the Contractor's final invoice for payment.
2. Warranty shall provide for replacement of defective materials plus installation and labor. Any warranty claim made by MCPS prior to the expiration of said warranty shall be satisfied although the warranty has subsequently expired. Failure of a bidder to provide satisfactory warranty service to MCPS shall be grounds for exclusion from future bidding.
3. Any warranty/guarantee offered by the manufacturer used on this project, which is longer than MCPS standard warranty/guarantee as specified herein, shall take precedence, i.e. window frames finish and thermally broker insulated window 10 years, etc.
4. Upon completion of the projects, the point of contact may change between the MCPS Project Coordinator and the Contractor when identifying and resolving any warranty claims during the warranty period.

K. Asbestos Free Materials

1. **NO MATERIALS PROVIDED SHALL CONTAIN ASBESTOS** All Contractors providing and/or installing any of the building materials listed below shall secure laboratory analysis confirming that materials contain NO ASBESTOS. The cost for testing shall be included in the bid prices offered. After the initial testing has been performed

additional annual testing will be required thereafter or immediately upon any change in materials or manufacturers.

- Acoustical ceiling tile, HVAC, piping, wall, etc.)
- Adhesives
- Caulking
- Fire Rated Doors
- Fire Board
- Floor tile and sheet flooring,
- Folding Doors
- Gypsum Panels (Drywall)
- Insulation (All types; roof,
- Mastics
- Plaster
- Roofing System Components e.g. BUR Asphalt, Felts, Cap Sheets, Shingles, etc.
- Spackle
- Toilet Partitions
- Window Glazing

The laboratory performing the analysis must have received U.S. Environmental Protection Agency (EPA) accreditation and be a member of the National Voluntary Laboratory Accreditation Program (NVLAP). The Contractor or the manufacturer can have the laboratory testing performed. No other form of confirmation such as Material Safety Data Sheets, manufacturer documentation, historical testing, etc. will be accepted. A list of EPA accredited laboratories can be found at <http://ts.nist.gov/standards/scopes/programs.htm>

The Contractor shall provide required laboratory analysis report(s) and a completed “Asbestos Free Material Verification Form” herein (see **APPENDIX G**) **within 15 working days** after receipt of the “Pre-Award Notification” letter for each listed product required in the execution of the scope of work.

2. Existing Asbestos Materials

MCPS shall be responsible for all asbestos abatement tasks as may be required regarding existing materials on site. Any questions concerning asbestos materials shall be directed to the Environmental Team Leader at 240-740-2324.

L. BRAND NAMES

1. Commodity descriptions that state “Only a specified brand will be considered” are brands that have been evaluated and tested for inclusion on this bid and are the only brands acceptable at this time. **No substitutions will be accepted at this time.** Other brands will be evaluated and tested for future projects by MCPS if materials are submitted at no cost to MCPS. Forward samples/information to Montgomery County Public Schools, Division of Design and Construction, 45 West Gude Drive, Rockville, Maryland 20850. **Testing normally requires a minimum of 60 work days to complete; therefore, your samples/materials for testing may be approved for future bids if the evaluation is satisfactory. This process of evaluation is intended for larger types of equipment and/or components i.e. bleachers, elevator, lockers, flooring, roofing systems, and PA Systems.**
2. The 60 workday, evaluation process is not intended for small system components where the term “or MCPS equal” is used herein. These items of a lesser dollar value such as electrical/plumbing components, switches, adhesives, sealers, etc., can quickly be

evaluated by MCPS to determine if they are equal to the proto-type identified. Upon MCPS evaluation of the offered equal to item, it is determined that it is not equal to the proto-type, the successful contractor shall be required to provide the MCPS identified proto-type product.

3. The brand name, code or model number on each item being offered, even if bidding the specified brand shall be provided. If a brand and code or model number is not shown your bid may not be considered.

M. DESCRIPTIVE LITERATURE

The apparent successful bidder may be required to furnish, **within two (2) working days** after request, sufficient detailed information regarding makes, models, design, etc., of the item(s) offered. The bidder is required to furnish all literature properly bound and labeled, showing full instructions and detailed specifications. The literature and specifications are to be arranged and labeled in numerical sequence according to item and attached on separate pages of a brochure. Bidder shall show the manufacturer's code and catalog numbers of the item(s) offered. The cover of the brochure shall contain:

1. Bidder's name, address and telephone number
2. Bid number

N. DEVIATIONS

All bids, meeting the intent of the invitation, will be considered for award. Bidders who are deviating from the terms, conditions, and/or specifications shall list such and explain fully on a separate sheet to be submitted with their bid. If these deviations are of a technical nature, the bidder shall supply manufacturer's engineered description of the deviation. The absence of such a sheet shall indicate that the bidder has taken no exception and shall be held responsible for performing in accordance with the terms, conditions, and specifications as stated herein

O. MATERIAL SAMPLES

The successful bidder shall supply, within five (5) business days, all samples as requested by MCPS of products offered for verification and/or evaluation. These samples must be of sufficient size and amount as requested and must be properly identified with labels with manufacture instructions. Samples must be identical to those that will be used on MCPS projects. The MCPS project coordinator shall be notified of any design changes prior to delivery and the contractor shall supply sufficient information to allow evaluation.

P. DELIVERY, STORAGE, AND HANDLING

Prices shall include all delivery costs as required to ship materials to various locations throughout Montgomery County, Maryland. All deliveries must be prepaid FOB destination and in no case will collect shipments be accepted. All pricing must be all-inclusive, no travel time or delivery charges will be accepted.

Q. SUBMISSION OF BIDS1. Bid Documents

One (1) original and one (1) copy of the bid are requested. The cover page of each copy must be clearly marked original or copy. Bidders may wish to reproduce and retain an additional copy for your files.

2. Quotation Form

a. Quotations are to be entered on Quotation Form pages 1-7 supplied under **APPENDIX H. Faxed or digital quotations are not acceptable. SEALED BIDS ONLY.**

b. **Bidder must submit a separate price for each item listed on the Quotation Form. Submission of one price for all the items without indicating a price per item shall be considered non-responsive and will invalidate the bid.**

c. This solicitation shall be valid for acceptance during a period of no less than ninety (90) days from the bid opening date. Once the contract is approved by the Board of Education, terms and conditions of the solicitation shall prevail throughout the contract period.

3. Addenda/Errata

Changes and addenda to a solicitation may occur prior to the bid opening date and time. It is the bidder's responsibility to check the MCPS website under event calendar <http://www.montgomeryschoolsmd.org/departments/procurement/> or contact the Division of Procurement by fax 301-279-3172 or email to procurement@mcpsmd.org to confirm that they have all addenda/errata. Failure to acknowledge addenda/errata on the form may result in a bid being deemed non-responsive and consequently rejected.

4. Minority Business Enterprise in Public Schools

Attachment A and B of the MBE PROCEDURE (**APPENDIX A**) reflecting minimum 0% MBE participation shall be submitted with your bid. (*See Section II Contract Administration* for additional MBE information).

5. **State of Maryland REQUIRED License (MUST BE SUBMITTED WITH BID)**

General Requirements: The Contractor shall possess a current "State of Maryland" **Construction Business License. This is considered "TAX LIABILITY" Licenses and do not authorize a contractor to perform any trade specific work in the State of Maryland without the appropriate trade licenses as required. NOTE: All out of state bidders must provide an out of state Maryland Construction Business.**

Construction Business License: This type of business license is issued through the County or Baltimore City, or the Clerks of the Circuit Court in which your business is located within the State of Maryland. Contact the **State License Bureau**

<http://www.marylandtaxes.com/> or at 410-260-6240 for additional information as required. **THIS LICENSE MUST BE SUBMITTED WITH THE BID PROPOSAL.**

6. Statement of Experience

The contractor shall provide statement of experience with bid proposal. See “**CONTRACT ADMINISTRATION SECTION; L QUALITY ASSURANCE**” for more information. Failure to provide required documentation will disqualify bid proposal.

7. **Contractor’s Obligation Regarding Criminal Records of Individuals Assigned to Work in MCPS Facilities**

Beginning July 1, 2015, all MCPS Contracts must include the following provisions:

a. **Prohibition against assigning registered sex offenders and individuals convicted of sexual offenses, child sexual abuse, and other crimes of violence to MCPS contracts:**

Maryland Law requires that any person who enters into a contract with a county board of education “may not knowingly employ an individual to work at a school” if the individual is a registered sex offender. Under §11-722 of Criminal Procedure Article of the Maryland Code, an employer who violates this requirement is guilty of a misdemeanor and if convicted may be subject to up to five years imprisonment and/or a \$5,000.00 fine. Effective July 1, 2015, amendments to § 6-113 of the Education Article of the Maryland Code further require that a contractor or subcontractor for a local school system may not knowingly assign an employee to work on school premises with direct, unsupervised, and uncontrolled access to children, if the employee has been convicted of, or pled guilty or nolo contendere to, a crime involving:

1. A sexual offense in the third or fourth degree under § 3–307 or § 3–308 of the Criminal Law Article of the Maryland Code or an offense under the laws of another state that would constitute an offense under § 3–307 or § 3–308 of the Criminal Law Article if committed in Maryland;
2. Child sexual abuse under § 3-602 of the Criminal Law Article, or an offense under the laws of another state that would constitute child sexual abuse under § 3-602 of the Criminal Law Article if committed in Maryland;
3. A crime of violence as defined in § 14–101 of the Criminal Law Article, or an offense under the laws of another state that would be a violation of § 14–101 of the Criminal Law Article if committed in Maryland, including: (1) abduction; (2) arson in the first degree; (3) kidnapping; (4) manslaughter, except involuntary manslaughter; (5) mayhem; (6) maiming; (7) murder; (8) rape; (9) robbery; (10) carjacking; (11) armed carjacking; (12) sexual offense in the first degree; (13) sexual offense in the second degree; (14) use of a handgun in the commission of a felony or other crime of violence; (15) child abuse in the first degree; (16)

sexual abuse of a minor; (17) an attempt to commit any of the crimes described in items (1) through (16) of this list; (18) continuing course of conduct with a child under § 3-315 of the Criminal Law Article; (19) assault in the first degree; (20) assault with intent to murder; (21) assault with intent to rape; (22) assault with intent to rob; (23) assault with intent to commit a sexual offense in the first degree; and (24) assault with intent to commit a sexual offense in the second degree.

Each contractor is required to submit, following award of a contract, documentation confirming that its direct employees and those of any sub-contractors and/or independent contractors assigned to perform work in a MCPS school facility under the contract meet this obligation.

Additionally, the contractor must confirm that it continues to meet this obligation on an annual basis and/or when there are changes in the work-force that the contractor and/or its sub-contractors use to perform the work required by the contract.

Violation of this provision is a material breach of contract for which MCPS may take appropriate action up to and including termination of the contract.

b. **Required criminal background check process for certain individuals in the contractor's workforce:**

Under recent amendments to § 5-551 of the Family Law Article of the Maryland Code, each contractor and subcontractor shall require that any individuals in its work-force must undergo a criminal background check, including fingerprinting, if the individuals will work in a MCPS school facility in circumstances where they have direct, unsupervised, and uncontrolled access to children. The term "work-force" in this and the preceding section refers to all of the contractor's direct employees, sub-contractors and their employees, and/or independent contractors and their employees that the contractor uses to perform the work required by the contract.

Fingerprinting for the criminal background check may be performed by the MCPS Office of Human Resources and Development, 45 West Gude Drive, Rockville, MD 20850, or through another service approved by MCPS. Individuals fingerprinted by MCPS will be required to provide written consent, and MCPS will maintain copies of all records for criminal background checks performed by MCPS. If the contractor uses another service approved by MCPS, the results of the criminal background check must be provided to MCPS for record keeping. A list of MCPS approved fingerprinting agencies can be found on the Division of Procurement website at <http://www.montgomeryschoolsmd.org/departments/procurement>.

The contractor must take appropriate steps to promptly follow up on information identified in the criminal background check related to the sexual offenses, child sexual abuse offenses, and crimes of violence enumerated above, as well as any information regarding offenses involving distribution of drugs or other controlled

substances, or any other criminal information identified by MCPS as warranting further explanation insofar as it may significantly affect the safety and security of MCPS students. If, after following up, the contractor believes

R. BID SECURITY

1. SURETY STATEMENT

The Surety Agent for the Offeror shall provide on his letterhead a letter addressed to Montgomery County Public Schools signed by an authorized representative of the bonding company, stating:

(Name of Applicant) has been a client of (name of surety company) for over ____ years. During that time, we have supported this firm in their pursuit of projects in the \$_____ range and total programs in excess of \$_____.

We are prepared to provide Bid, Performance, and Payment Bonds on MCPS projects bid between October 2022 and October 2023. provided (name of applicant) makes application to us at the time of the Bid, and we are satisfied with the prevailing underwriting conditions, including but not limited to, acceptable contract terms, job specifications and acceptable bond forms.

Payment and performance bonds:

For projects over \$100,000, the Bidder to whom a contract is awarded must furnish Performance and Payment Bonds, each in the amount of one hundred percent (100%) of the project awarded amount, including executed Change Orders, in the form specified.

These must be provided at the time of the project award notice and prior to the start of any work.

2. If the successful bidder withdraws their bid or fails to execute and deliver to MCPS the contract and the required bonds within five working days after receipt of the Bid Award, the Bid Security shall be forfeited to MCPS as the result of such failure. **Note: Failure to submit the bid security with the bid proposal will be reason to be considered a non-responsive bid.**

S. EMARYLAND MARKETPLACE ADVANTAGE REGISTRATION

Maryland law requires local and state agencies to post solicitations on eMaryland Marketplace. Advantage. Registration with eMaryland Marketplace is free. It is recommended that any interested supplier register at <https://emma/maryland.gov/>, regardless of the award outcome for this project as it is a valuable resource for upcoming bid notifications for municipalities throughout Maryland.

T. AWARD CRITERIA

1. Conformance to specifications and completeness of bid submission
2. Ability to perform

- 3. Price
- 4. Past performance
- 5. MBE compliance
- 6. Completed quotation form

U. **INQUIRIES**

Inquiries regarding this solicitation must be submitted **in writing**, to Laly Bowers, Buyer II, Montgomery County Public Schools, 45 West Gude Drive, Suite 3100, Rockville, Maryland 20850, fax number 301-279-3173, or email to procurement@mcpsmd.org. Questions must be received no later than four business days prior to bid opening in order for the bidder to receive a reply prior to submitting its bid. The Board of Education will not be responsible for any oral or telephone explanations or interpretations. **Bidder contact with any other MCPS employee regarding this solicitation until the contract is awarded by the Board of Education will be considered by MCPS as an attempt to obtain an unfair advantage and result in non-consideration of its bid.** The web site address for the MCPS Division of Procurement is <http://www.montgomeryschoolsmd.org/departments/procurement/vendors.aspx>.

Subsequent to the award if the contractor finds any discrepancy or omission and has questions of MCPS’s intent, prior to performing work, they shall notify the MCPS Project Coordinator **in writing** via fax to resolve and receive clarification with copies to Laly Bowers, Buyer II, and the MCPS Capital Improvement Contracting Supervisor.

V. **REFERENCES**

Bidders shall provide three references with their bid submission. The references shall have company name, contact person, address and phone number of three current customers for which a contract for similar size and type of project has been provided. If the reference information is not accurate and MCPS cannot contact the person(s) named then your bid may not be considered. MCPS may request additional references. **Note: ALL BIDDERS must provide references, other than MCPS including bidders currently engaged in business with MCPS.**

<u>Company Name & Address</u>	<u>Contact Person</u>	<u>Phone Number</u>	<u>Contract Number</u>
1. _____			
Email _____			
2. _____			

Email _____			
3. _____			
Email _____			

W. SPECIAL CONDITIONS

1. Audit Provisions – MCPS shall have the right to examine the successful bidder records pertaining to work performed under the contract to determine and verify their compliance with all contractual conditions. MCPS shall be granted access to such records at all reasonable times during the contract period and for three years thereafter.
2. Contingent Fee – The successful bidder hereby represents that they have not retained anyone to solicit or secure this contract from MCPS upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, except for bona fide employees or bona fide established commercial selling agencies maintained by the person so representing for the purpose of securing business, or any attorney rendering professional legal services consistent with applicable canons of ethics.
3. Assignments – Neither this contract nor any interest therein nor claim thereunder shall be assigned or transferred by the successful Bidder(s) except as expressly authorized in writing by MCPS and no contract shall be made by the successful Bidder(s) with any other party for furnishing any of the work or services herein contracted for without the written approval of MCPS.
4. Disputes – Any dispute concerning a question of fact arising under this contract shall be disposed of by written agreement between the Contractor and the MCPS Contracting Officer. Pending final decision of a dispute hereunder, the Contractor shall proceed diligently with the contract performance.

II. CONTRACT ADMINISTRATION**A. PRE-CONSTRUCTION MEETING**

1. MCPS reserves the right to convene a meeting with the apparent low bidder prior to awarding a contract. The purpose of this meeting is to afford all parties an opportunity to discuss any aspects of project and contract execution, which may be of concern for the successful and timely completion of the project.
2. Documents required elsewhere in this specification, such as service and warranty agreements, shall be provided at this meeting.
3. Issues raised during this meeting, which cannot be resolved to MCPS satisfaction, will be cause to reject the apparent low bid and to consider the next lowest bidder as the successful offeror.

B. CONTRACT SECURITY

1. Security may be in the form of Certified Cashier's or Bank Treasurer's Check **OR** Bonds (AIA Documents A-311, A-312, or similar). The bonding firm must be licensed to do business in the State of Maryland.
2. The successful bidder(s) shall deliver to MCPS Performance and Payment Bonds **within five working days after receiving notification of award for individual projects with a contract value of \$100,000.00 or more. This cost shall be included in the proposal.**
3. The cost of the bond(s) shall be included in all proposal \$100,000.00 or more by the contractor. **Note: Failure to supply the contract securities as specified will be considered a contract violation and shall be grounds for contract cancellations.**

C. POST BID SUBMISSIONS

1. The apparent low bidder may be required to supply **within forty-eight (48) hours** after MCPS requests, applicable business and contractor's licenses, master licenses for trades appropriate for work to be performed, and/or company financial statements, etc., as required to allow MCPS time for contractor evaluation. **Failure to supply a copy as specified may disqualify your bid proposal.**
2. Sub-contractors
 - a. MCPS must approve all sub-contracting work in advance; the prime contractor shall supply MCPS with the rationale for requesting sub-contracting. **It is MCPS' intent that the contractor has the in-house resources to perform the primary task and only sub-contract secondary task(s) which they do not specialize in, appropriately, e.g., electrical, mechanical and/or plumbing, etc.** The contractor shall supply a complete list of all sub-contractors and the cost of their work for evaluation by MCPS. This list must be submitted within two workdays after MCPS makes the request. **Failure to do so will be grounds for termination of your contract.** The contractor shall be responsible for assuring that all proposed sub-

contractors are in good standing with MCPS and have been in business for five years and have a minimum of five years experience performing the type of work they will be performing under this contract and possess appropriate licensing.

- b. MCPS shall notify the contractor **in writing** if, after due investigation, there is reasonable objection to any of the proposed sub-contractors. Failure of MCPS to make objection to any proposed sub-contractor shall constitute notice of no objection. Each sub-contractor may be required to furnish to MCPS, in duplicate, proof of their financial stability and experience to perform the particular work for which they will be engaged. All contractual agreements between the Contractor and their sub-contractors shall be written and unamended on the Standard Form of Agreement between the contractor and sub-contractor, AIA Document A401 (most recent Edition). Upon request the contractor shall supply copies of this contract to MCPS **within five workdays**.
 - c. MCPS acceptance of sub-contractors in no way relieves the contractor from being responsible for the total and complete performance of the work for the project; i.e., failure of the sub-contractors to satisfactorily perform the work in a timely fashion is the contractor's responsibility and not that of MCPS.
3. Minority Business Enterprise (MBE) in Public Schools
- a. Certified Minority Business Enterprises are highly encouraged to respond to this solicitation.
 - b. Since state funds may be involved in future project(s) performed under this bid "**it is important that bidders review the new state revised MBE Procedures carefully to ensure compliance**". **There is a 0% MBE goal set** for this bid. On future state funded project(s) that may be performed under this bid, that exceed \$50,000. The bidder may be required to solicit MBE participation, which will include providing revised Certified MBE Utilization and Fair Solicitation Affidavit (Attachment A) and the MBE Participation Schedule (Attachment B) along with other required MBE forms that may be applicable. Bidders are always strongly encouraged to make a good faith effort to solicit Certified Minority Business participation to provide materials, supplies, equipment, and/or service whenever possible at any time prior to bidding or throughout the course of the project.
 - c. Refer to the document, MINORITY BUSINESS ENTERPRISE PROCEDURES, September 22, 2008, included with this bid solicitation package under **APPENDIX A**.
 - d. The Certified MBE Utilization and Fair Solicitation Affidavit (Attachment A) and the MBE Participation Schedule (Attachment B) located herein under **APPENDIX A., must be completed and submitted with the bid proposal** identifying the bidder's specific commitment of certified minority business **even when the MBE goal is 0%**. Failure to supply as specified will disqualify your bid proposal.

- e. Contact the MCPS MBE Liaison, at 240-314-1031; regarding any other MBE procedure questions. Current listing of the MBE certified contractors can be obtained at http://mbe.md.state.md.us/directory/search_select.asp.

4. Submit Evidence of Insurance

a. Insurance

See Article XXI of the General Stipulations and Instructions to Bidders. The successful contractor shall submit an actual certificate of insurance made in favor of MCPS within five (5) workdays after a Pre-Award Notification letter has been issued to the Successful Bidder.

b. Additional Insurance

The Montgomery County Board of Education shall be named as an additional insured on all liability policies.

c. Policy Cancellation/Certificate Holder

1. Sixty (60) days written notice of cancellation or material change in any of the policies is required.
2. The Procurement Unit, Montgomery County Board of Education shall be the insurance certificate holder.

5. Invoicing

- a. Contractor shall submit invoices to the MCPS Project Coordinator, Division of Design and Construction, preferred electronically via email or regular mail to the Project Coordinator, Montgomery County Public Schools, **45 West Gude Drive, Suite 4300, Rockville, Maryland 20850** for payment approval. **All invoices shall identify pertinent information such as purchase order number and building name where work was performed.** The MCPS Project Coordinator shall submit invoices and receiving reports to the Division of Controller to process payments, and shall specify final or partial payments.
- b. A complete State of Maryland, CERTIFIED MINORITY BUSINESS ENTERPRISE PARTICIPATION STANDARD MONTHLY CONTRACTOR'S REQUISITION FOR PAYMENT IAC/PSCP Form 306.4 must accompany all invoices, involving state funding. (See **APPENDIX B, Attachment G herein.**) **No invoices will be process for payment without this form being submitted. INVOICES THAT DO NOT HAVE PAYMENTS TO MBE SUB-CONTRACTORS ARE STILL REQUIRED TO HAVE THIS FORM ATTACHED AND IDENTIFY NO MBE PAYMENTS BY PLACING A ZERO ON THE FORM.**
- c. MCPS is not obligated to make any partial payments. However, partial payments may be considered based upon the Contractor's justification of expenditures and

satisfactory work performed up to 75% of the total project cost. The remaining balance will be paid upon MCPS acceptance of the project as being 100% completed and in compliance with specifications. MCPS will refrain from making any partial payments if, in MCPS opinion, the project falls behind schedule. Final payment shall be made after the project is complete in all detail and as specified herein and accepted by the MCPS Project Coordinator.

- d. Partial payment invoices shall be accompanied by a detailed schedule of values allocated to various portions of the work (similar to AIA Documents G702 & G703). This schedule, unless objected to by the MCPS Project Coordinator, shall be used as a basis for reviewing the Contractor's application for partial payment.

6. Permits and Inspections

The Contractor shall obtain all required permits, including electrical and plumbing permits, pay all fees, and certify that other required permits have been obtained prior to commencing work. This includes, but is not limited to, the Contractor securing permits on behalf of MCPS and scheduling of inspections as required by Federal, State and County authorities. Upon completion of all work, obtain all certificates of inspections required and deliver them to the MCPS Project Coordinator. All required permit certificates and related documentation shall be submitted to the MCPS Project Coordinator for approval prior to final payment.

D. STATE FUNDED PROJECT COMPLIANCE REQUIREMENTS

1. The Contractor shall complete and submit to MCPS, CONTRACTOR'S CERTIFICATION OF RECEIPT OF PAYMENT, included with this bid solicitation package under **APPENDIX B**. This form shall be completed after the Contractor has received payments from MCPS exceeding the amount of the State funding. At the time of the contract award, the Contractor shall be informed of the actual dollar amount being funded by the State for the project. Once the Contractor has received payment from MCPS exceeding this amount, the Contractor shall have **ten (10) days** in which to submit CONTRACTOR'S CERTIFICATION OF RECEIPT OF PAYMENT to MCPS. No further payments will be made to the Contractor until this form has been submitted.
2. **THE CONSTRUCTION SIGN SHOULD BE ERECTED FOR ALL STATE OF MARYLAND SCHOOL FUNDED CONSTRUCTION PROGRAM PROJECTS THAT EXCEED \$100,000.00.** The Contractor shall supply and install the sign as specified herein in **APPENDIX C** on the project site. The Contractor has the option of making a specified sign or obtaining the sign from State MCE Sign Platt #111 (a State Agency) C/O Patuxent Institution, Attn: Charles Behnke, Plant Manager, 7555 Waterloo Road, Jessup, MD 20794, phone number 410-799-5102 or 5103 or via email cwbehnkekk@dpsc.state.md.us The current price from Maryland Correctional Enterprises for this sign is \$525.00 with lead-time of approximately one week. The Contractor shall coordinate the location of the sign with the MCPS Project Coordinator. The Contractor shall remove the sign and restore the site to original condition upon the completion of the contract. It will be MCPS option to either retain the sign for future use or have the Contractor dispose of the sign.

E. STATE MBE - LIQUIDATED DAMAGES PROVISION

- a. This contract requires the Contractor to make good faith efforts to comply with the State Minority Business Enterprise ("MBE") Program and contract provisions. The MCPS and the Contractor acknowledge and agree that the MCPS will incur damages, including but not limited to loss of goodwill, detrimental impact on economic development, and diversion of internal staff resources, if the Contractor does not make good faith efforts to comply with the requirements of the MBE Program and MBE contract provisions. The parties further acknowledge and agree that the damages the MCPS might reasonably be anticipated to accrue as a result of such lack of compliance are difficult to ascertain with precision.
- b. Upon a determination by the MCPS that the Contractor failed to make good faith efforts to comply with one or more of the specified MBE Program requirements or contract provisions, the Contractor agrees to pay liquidated damages to the MCPS at the rates set forth below. The Contractor expressly agrees that the MCPS may withhold payment on any invoices as a set-off against liquidated damages owed. The Contractor further agrees that for each specified violation, the agreed upon liquidated damages are reasonably proximate to the loss the MCPS is anticipated to incur as a result of such violation.
 1. Failure to submit each monthly payment report in full compliance with COMAR 21.11.03.13B (3): \$100 per day until the monthly report is submitted as required.
 2. Failure to include in its agreements with MBE sub-contractors a provision requiring submission of payment reports in full compliance with COMAR 21.11.03.13B (4): \$500.00 per week per MBE subcontractor.
 3. Failure to comply with COMAR 21.11.03.12 in terminating, canceling, or changing the scope of work/value of a contract with an MBE subcontractor and/or amendment of the MBE participation schedule: the difference between the dollar value of the MBE participation commitment on the MBE participation schedule for that specific MBE firm and the dollar value of the work performed by that MBE firm for the contract.
 4. Failure to meet the Contractor's total MBE participation goal and sub-goal commitments: the difference between the dollar value of the total MBE participation commitment on the MBE participation schedule and the MBE participation actually achieved.

F. SALES TAX

Section 326 (a) of Chapter 452 of the Laws of Maryland, 1968, provides, among other things, for the taxation of "any sale ... of tangible personal property to contractors or Builders to be used for the construction, repair, or alteration of real property ..." Sales tax, as applicable, shall be included in any bid made to the Board of Education of Montgomery County, Maryland.

G. PERFORMANCE

1. The Contractor shall have on the job site at least one person fluent in English at all times and at least one person who has an MCPS badge at all times.
2. **The Contractor must provide to the MCPS Project Coordinator cellular telephone numbers and E-mail addresses of project managers to allow for day-to-day direct communications.**
3. Work to be completed in a timely workmanlike manner; fumes, odors, materials and work procedures will be controlled to protect occupants and property from harm and damage.
4. The Contractor shall furnish the services of an experienced supervisor, who shall be in charge of the work and to provide direction to the crew at all times.
5. Contractor and employees;
 - a. Contractors are required to have **all employees complete the fingerprinting and background check, so they can receive an MCPS Contractor badge.** MCPS Contractor's badges shall be worn while on-premises. **Contractor's employees /workers without an MCPS contractor badge may be denied entry; however, if entry is granted** contractors will be required to check in daily at the facility's main office to obtain a visitor badge. These badges must be returned to MCPS daily. All Contractors employees must wear a badge while on site.
 - b. Use of any form of tobacco products, liquor and/or illegal drugs is not permitted in MCPS buildings and on grounds.
 - c. Are not to routinely use facility equipment and buildings, i.e., telephone, lounges, toilet rooms, parking lots, etc. The MCPS Project Coordinator will designate such facilities authorized for Contractor use.
6. All work shall be scheduled to the mutual satisfaction of the School Administration and the MCPS Project Coordinator to avoid conflicts with school activities.
7. The building is expected to be occupied throughout the stated period allowed for this work. The Contractor shall take all required safety precautions during the installations. **Contractors shall secure all openings, at the end of the work day, during projects.**
8. Contractor shall be in compliance with FM Global requirements for all welding related portion of this contract.
9. Work area must be left clean and ready for use after the installation. The Contractor shall remove all debris generated by work from the premises daily adhering to **Montgomery County Solid Waste and Recycling Regulation No. 15-04 AM, COMCOR 48.00.03. The Contractor shall track all recyclable materials such as metal, concrete asphalt, cardboard, etc. and provide to MCPS recyclable amounts by weight as requested.**
10. Installation must be performed in strict compliance with the latest local, state, and federal

regulations having authority. The Maryland Occupational Safety and Health Administration Hazard Communication Standards and the Occupational Safety and Health Administration Hazard Communication Standards must be followed.

11. Upon completion of all work, any and all damage to the school building and grounds as a result of the work; must be restored to a condition as good as existed prior to damaging. Damaged lawns shall be repaired; fill ruts and holes with top soil apply one step Hyrdo-seed containing cellulose or wood fiber fertilizer and grass seed, damaged shrubs and trees shall be replaced.
12. Field measurements are required.
13. **Failure to perform in accordance with MCPS specifications and industry standards may result in the Contractor being removed from the approved Bidder list to receive future Invitation For Bid for a period of two years.**

H. CHANGES IN THE WORK

1. Should alterations or changes be necessary at any time during the progress of the work or to add to or delete work, MCPS shall have the undisputed right to make such changes, additions, omissions, or alterations by written order. **An MCPS CHANGE ORDER FORM under APPENDIX E must be completed and signed by both MCPS and Contractor’s authorized representative as identified on the form. All Change Order Forms, Proposals and other supporting documentation relating to additional work must be supplied to the MCPS Project Coordinator within one (1) week from the time the Change Order need is identified. No cost increases to contract will be paid without a completed Change Order Form signed by both parties. Approved Change Orders do not automatically revise completion dates. It is the Contractor’s responsibility to provide a written request for extension, as they deem necessary, with an explanation of justification. Using approved Change Orders as rationale for not completing on time will not be accepted without an MCPS approved extension. If additional work is performed without MCPS written authorization, the Contractor will be subject to reversing said work, or work and materials shall remain in place at no cost to MCPS. This shall be solely at MCPS’ discretion.**
2. The allowable, “all inclusive” mark-up for combined supervision, overhead, bonds, fringe benefits, union fees, small equipment, tools and profit for work performed by the prime Contractor shall be based on the monetary value of the work not to exceed the following rates:

<u>Value of Work</u>	<u>Combined Overhead & Profit</u>
\$0 - \$1,000	20%
\$1,001 - \$4,999	18%
\$5,000 - \$9,999	16%
\$10,000 - \$24,999	14%
Over \$24,999	Negotiated but not more than 10%

This schedule applies to work done by the prime Contractor or by a Sub-Contractor(s). The prime Contractor shall be allowed not more than 8% of the Sub-Contractor's all inclusive cost for combined supervision, overhead, bonds, fringe benefits, union fees small equipment, tools and profit for labor materials.

3. The Contractor shall furnish supporting documentation with all Change Order Requests for all credits and/or extras. At a minimum, change order requests shall include a description of the work, detailed material lists, costs of materials (actual Contractor costs, not list prices), man-hours and rates. The Contractor shall not use any sub-contractors that are not willing to provide itemized proposal as required by MCPS. The same material costs, man-hours, rates, supervision, overhead and profit shall be applied equally to all credits.

I. LATE CHARGES FOR FAILURE TO COMPLETE ON TIME

1. MCPS shall retain \$250.00 per each calendar day of delay beyond the completion date stipulated on each proposal, for the first five (5) days. MCPS shall retain \$500.00 for each calendar day thereafter. The late charges shall be assessed by MCPS as a result of the late completion. This shall apply if the Contractor fails to meet any specified target date as identified on each proposal unless written approval for extension has been granted by MCPS.
2. Failure to complete the work within the time specified will entitle MCPS to late charges. These charges will be deducted and retained out of any monies due to the Contractor under this contract for the sum stated in the above paragraph for each calendar day required to complete the work beyond the agreed upon and documented completion date. This includes Saturdays, Sundays, and legal Holidays.
3. If necessary to reach a proper stopping place in any portion of work or to complete work within contract time limit, the Contractor shall work overtime both their forces and forces of their Sub-contractors without additional cost to the contract price. The Contractor shall be responsible for all incidental costs in connection with such overtime work including, but not limited to, MCPS building services staff overtime as required.
4. If work falls behind schedule, as determined by the MCPS Project Coordinator, the Contractor shall provide, at their own expense, additional labor and/or equipment, overtime pay, etc., required to overcome delays including, but not limited to, MCPS building services staff overtime as required.
5. The MCPS Contract Officer will review requests for extension of completion time due to strikes, lack of materials, and/or any other condition, over which the Contractor has no control. Written application for extension shall be made immediately upon occurrence of conditions that, in the opinion of the Contractor requires such an extension, with reason clearly stated and detailed proof for each such delay. The delay of MCPS issuing a purchase order does not automatically alter any completion dates. If in the Contractor's view the delay of a purchase order is having a negative effect on completion of the contract within the dates specified, they must notify MCPS in writing immediately. Using the rationale that a purchase order was issued late, at the conclusion of the work will not be an acceptable reason for requesting a contract extension. No time extension will be allowed

except by final written approval of the MCPS Contract Officer. No requests for extension due to weather conditions will be considered unless accompanied by documentary evidence supplied by the NOAA's National weather service showing, by comparison, that such weather suffered is abnormal to any of the past five (5) years as recorded. **No request for extension will be considered by MCPS if received from the Contractor after the previously agreed completion date has passed. Late charges will be automatically deducted.**

J. CONTRACTOR'S OVERTIME PROCEDURE

If the Contractor chooses to work overtime for any reason and secures MCPS approval to do so, the Contractor shall be responsible for any associated costs including MCPS building service staff, etc. Average building service staff overtime rate is \$35.00 per hour depending on the individual working. This rate is estimated and could either be more or less than the quoted overtime rate. All overtime work must be requested **in writing** to the MCPS Project Coordinator, at least forty-eight (48) hours in advance. This will allow MCPS staff sufficient time to coordinate the required building service staff participation. The Overtime Reimbursement Agreement under **APPENDIX F** must be completed and signed by MCPS and the Contractor before work is to be performed. The request must identify the dates and times the Contractor proposes to work. Without written request and Overtime Reimbursement Agreement, MCPS will not approve any overtime.

K. MCPS CONTRACT SUPERVISOR/PROJECT COORDINATOR

1. The Capital Improvement (CIP) Contracting Office Supervisor will represent MCPS in the execution of this contract. No changes in contract conditions or specifications will be made without the CIP Contracting Office Supervisor's approval and authorization by the Supervisor, of the Procurement Unit.
2. After award the MCPS Project Coordinator will be assigned to this project who will handle the day to day operation and installation coordination. Scheduling work on site after an award of contract must be made through the MCPS Project Coordinator.
3. The MCPS Project Coordinator is authorized to:
 - a. Serve as liaison between MCPS and the Contractor;
 - b. Give direction to the Contractor to ensure satisfactory and complete performance;
 - c. Monitor and inspect the Contractor's performance to ensure acceptable timeliness and quality;
 - d. Serve as records custodian for this contract;
 - e. Accept or reject the Contractor's performance;
 - f. Furnish timely written notice of the Contractor's performance failure to the MCPS Contract Supervisor, copy to the Division of Procurement;
 - g. Prepare required reports;

- h. Approve or reject invoices for payment and submitted construction schedules;
 - i. Recommend contract modifications or terminations to the MCPS Contracting Supervisor, copy to the Division of Procurement;
 - j. Issue notices to the Contractor to proceed with the project after receiving signed Change Order as required.
4. The MCPS Project Coordinator is not authorized to make any determination that alter, modify, terminate or cancel the contract, affect procurement, interpret ambiguities in the contract language, or waive MCPS contractual rights.

L. QUALITY ASSURANCE

1. The Contractor shall perform all installations in accordance with MCPS specifications herein and the manufacturer's installation procedures, and in compliance with all applicable codes.
2. The successful Contractor shall have been in business a minimum of five (5) years, and have a minimum of five (5) years' experience performing the type of work similar to that, which is specified herein. **The Bidder shall provide a letter with their bid, documenting the number of years in business and years of experience performing the type of work required herein.**
3. All field welding must be performed by an **American Welding Society (AWS)** Certified Welder. All other work shall be performed by appropriately licensed trade persons. **A copy of these licenses and certificates must be submitted to the MCPS Project Coordinator prior to performing any work.**
4. The successful Contractor must be certified or shall agree to secure the certification by the United States, Environmental Protection Agency (EPA) as a "Lead-Safe Firm" under the Lead Renovation, Repair and Painting Rule. **If the bidder has a valid certification they shall provide a copy with your bid submission.** If not, the contractor must agree to secure the required certification within ninety (90) days of notification that you are apparent low bidder. The bidder shall pay all fees as required. The Contractor must maintain this certification throughout the term of this contract. Visit Link; <http://www2.epa.gov/lead/epa-lead-safe-certificationp-program> for additional certification information. **"NO WORK INVOLVING LEAD MATERIALS SHALL BE PERFORMED UNTIL THE CONTRACTOR HAS SECURED THIS CERTIFICATION AND FORWARD A COPY TO THE MCPS REPRESENTATIVE IDENTIFIED HEREIN".** Prior to securing the "Lead Safe Firm" Certification the Contractor may be required to hire a certified firm at no cost to MCPS with this Certification to keep an MCPS project from being delayed.

M. PROJECT CLOSE-OUT

1. Prior to solicitation of final payment, the Contractor shall notify the MCPS Project Coordinator **in writing** that the work is ready for punch-out inspections. All areas shall be clear of construction materials and debris.
2. During punch-out, the following individuals shall be present:
 - a. Authorized representatives of MCPS
 - b. Contractor
3. Upon completion of a punch-out, a written punch list will be prepared by the Contractor and submitted to MCPS within five workdays.
4. The Contractor shall notify the MCPS Project Coordinator **in writing** for a final inspection once all related punch list items have been completed. All punch-out and final inspection shall be performed well in advance of the completion date to allow for corrections. If not, late fees will be assessed until all corrections are made.
5. The Contractor shall provide written warranty statements indicating start and end of warranty dates to be signed by both the Contractor and MCPS.

III. DETAILED SPECIFICATIONS**A. INTENT**

This section of the specifications applies to and forms a part of all sections covering all labor, material for the removal and install of metal and wood doors, and frames, aluminum, steel and fiberglass frames windows with thermally broken insulated double glazed glass units and all related accessories. Bidder's unit prices offered shall include all required typical construction type work as may be necessary to perform door and window replacements. The Contractor will be required to submit a proposal based on awarded unit prices to perform approved work at various locations throughout MCPS in Montgomery County, Maryland. **All work is to be performed in accordance with all local and state applicable codes and as specified herein.**

B. REMOVAL

1. The Contractor shall remove and dispose of existing materials as required and specified herein. MCPS reserves the right to retain any and all materials. Items not retained become the property of the contractor for disposal. The Contractor must notify the MCPS Project Coordinator, five (5) days prior to removal of approved items. The MCPS Project Coordinator shall examine all items prior to removal from the premises.
2. **All door and window mounting frames pre-1975 shall remain in place. Contractor shall submit drawings of removal plans to MCPS project coordinator for approval prior to removal and ordering new material. No existing caulking shall be disturbed around existing door/window frames. All new wrapping materials shall encapsulate existing caulking.**

The Contractor shall wrap the new hollow metal frames over the existing frames so new hollow metal frames are wrapped tight to the existing frame in order to maximize opening as specified herein. The wrapped door frame opening allowance to be integrated with the door clearances to comply with manufacturer specifications.

Contractor shall remove existing windows carefully, so as not to disturb or remove existing framing that is secured to building structure.

C. METAL DOOR AND FRAME REQUIREMENTS

1. Acceptable Manufacturers
 - a. **Curries Company**
 - b. **Ceco Doors and Frames**
 - c. **Steelcraft Doors and Frames**
 - d. **MPI-Metal Products Inc.**

2. Generala. Scope

The Contractor shall furnish new metal doors and frames as specified herein and required by MCPS. All work is to be complete and in operating condition weather sealed. Wherever feasible, fit and assemble units in the manufacturer's facility. Clearly identify and present work on a shop drawing that cannot be permanently factory-assembled before shipment to assure proper assembly at the job site. All doors and frames shall be rigid and neat in appearance, free from warpage or buckle and free from all irregularities. All vertical edges/corner beads shall be true and straight and of minimum radius for the gage of metal used. **Metallic filler and body putty used to conceal manufacturing defects are not acceptable.**

b. Door and frame "mock-up"

As requested by MCPS the successful Contractor will be required to construct one (1) full scale fully finished "mock-up" of each door and frame type to be used in an actual field location to establish a level of quality that must be approved by MCPS before complete installation can proceed.

c. Coordination

The Contractor shall coordinate the dimensions and details of doors with all frames, details, finish hardware requirements, lights, and other related items affecting hollow metal doors and frames. Coordinate the jamb and/or requirements with adjacent wall construction and indicate those conditions on the shop drawings.

d. Shipment

Doors, frames, and accessories delivered shall be inspected for damage. Damaged units shall be removed from the job site. Frames of welded unit construction shall be strapped together in pairs with the head of one frame inverted for bracing. As an alternate method, temporary steel spreaders shall be securely fastened to the bottom of each frame. Ship doors in manufacturer's standard protective wrapper. MCPS Project Coordinator can request a copy of materials ordered at their discretion.

e. Storage

Doors and frames shall be stored carefully on platforms under cover. Storage spaces shall be in dry locations with adequate ventilation, free from dust and water, and shall permit easy access for inspection and handling. Use of non-vented plastic or canvas shelters, which create a humidity chamber, shall be avoided. If the protective wrapper on the door becomes wet it shall be removed immediately. Provide at least a 2" space between stored units to promote air circulation.

f. Paint/Numbering Requirements1. Metal Doors and Frames

Manufacturer primed and finish coat of paint applied with Sherwin & Williams **Pro Industrial Waterbased Alkyd Urethane** or **PPG PITT-TECH® Plus | 90-1110 Series** or MCPS approved equal. Color to be selected by the MCPS Project Coordinator from manufacturer's color standards or painted by Contractor to match existing facility colors. All exterior doors shall be painted before installation when seasonal temperature prohibits the application of paint on exterior surfaces. MCPS Project Coordinator will designate a location in the school facility for the doors to be painted. All paint products used shall be the lowest VOC available from the MCPS approved manufacturer.

2. Caulking

- a. All frames and wall connections shall be neatly caulked and sealed with an MCPS approved high grade exterior acrylic latex/silicon or polyurethane caulking compound.
- b. Furnish MCPS all Material Safety Data Sheets for all paints and caulking for approval prior to installation.

3. Numbering

- a. Contractor will supply and install Door numbers to the interior and exterior of the doors. Numbers will be 3" inches in height and 2" wide with Ariel Font.

g. Fire Resistant Rating

Boiler room door and frame construction shall comply with NFPA 80 and ASTM E152 and with the requirements of and shall bear the UL label.

h. Submittals1. Shop Drawings

The apparent low bidder shall submit shop drawings for each assigned project, indicating gauge, construction, fastening details, anchors, reinforcements, hardware, locations, hardware mounting heights and welding requirements for each opening, and door schedule (numbered in accordance with opening designations) listing types, sizes, and detailed remarks, for each project.

2. Manufacturer's Data

The apparent low bidder may be required to submit to MCPS a list of all proposed materials, printed specifications, test performances and results, installation directions, frame anchorage, reinforcements, frame construction, protection handling and storing instructions, cleaning instructions, and other pertinent information.

i. Provision of Hardware

Prepare door and/or frame assemblies to receive finish hardware, i.e., door hinges including cutouts, reinforcing, drilling and tapping at the factory to receive subsequent hardware per templates. Neither screws nor fastenings shall be exposed. Cutout for hardware shall be reinforced and have dust boxes. Comply with applicable requirements of ANSI A115 Series, and ANSI/SDI A250.6-2013 as applicable.

j. Door and Frame Installation

1. Install metal door and frame units in accordance with approved shop drawings, manufacturer's technical data, and as herein specified. All necessary anchors, bolts, hangers, brackets, screws, and associated fastenings shall be provided, as required, to assemble and secure frames, within the clearances specified in ANSI/SDI A250.8-2003 (R2008) unless otherwise specified or detailed. Where permitted, exposed fasteners shall be countersinking flat Phillips or Jackson Heads. Do all required masonry and carpentry work (including but not limited to: walls, floors and ceilings, etc.) for door and frame installations to a finish and completed project. Seal off all work areas for protection against weather and vandalism. **Take all safety precautions to protect persons from harm and MCPS property from damage.**
2. Install door frames prior to construction of enclosing walls. Set frames accurately in position, plumbed, aligned, and braced securely until permanent anchors are set. After wall construction is completed remove temporary braces and spreaders on doorframes leaving surfaces smooth and undamaged. Floor anchors shall be secured with powder-activated fasteners or MCPS approved anchors.
3. All frame installations shall be approved by MCPS Project Coordinator before installation proceeds.

k. ADA Hardware Items

Hardware items providing accessibility and usability for the physical handicapped shall comply with the Americans with Disability Guidelines (ADAAG).

3. Exterior Metal Doors

- a. Maximum Heavy-Duty Commercial Grade skins/face sheets to consist of 14 Gauge Cold Rolled Steel with vertical 20 Gauge continuous steel stiffeners no more than 6" on center with voids between stiffeners filled with sound-deadening thermal fiber industrial insulation.
- b. Vertical edges shall have Mechanical Interlock Edge seams full height of door and be continuous welded finished flush and smooth. Upper/lower rails will be reinforced with continuous 16gauge minimum steel channel spot welded to both faces of door. Top rail to be solid to retard moisture penetrating the door and the bottom rail to have weep hole for moisture escape.
- c. Doors shall conform to ASTM A653, A924 and E413-10 standards.
- d. Must conform to ANSI A250.4-2011 (Test Physical Endurance)
- e. Hinge reinforcements will be 7 Gauge steel angle or channel 12" long.
- f. Cylindrical lock reinforcement will be 16 gauge.
- g. Closer reinforcement shall be 12 gauge.
- h. All doors are to be hung by manufacturer specifications and to close properly without binding square and true to frame.

4. Interior Metal Doors

- a. Maximum Heavy-Duty Commercial Grade skins/face sheets to consist of 16 gauge Cold Rolled Steel conforming to ASTM A653A/A653M Standards with vertical 22 Gauge continuous steel stiffeners no more than 6" on center with voids between stiffeners filled with sound-deadening thermal fiber industrial insulation.
- b. See Detail Specification Section C, Exterior Metal Doors; 3; b through h.

5. Exterior Metal Screen Doors

- a. Exterior Hollow Metal Door 14 gauge from approved manufacturer as specified herein using an approved 20" x 30" window light frame replacing the glass with a removable screen frame using steel screening material with small diamond expanded metal.
- b. Screen Doors are only required on Kitchen exit door openings.
- c. All accessories and specifications apply to Screen Doors as the Exterior Metal Door requirements herein: closers, lock, threshold, paint, and numbers etc.
- d. See Detail Specifications, Section C; Exterior Metal Doors requirements; 3; b through h.

- e. Lock, closer and required hardware may need adjustment in location due to the closeness of the Kitchen exit door hardware, these adjustments must be approved by the MCPS Project Coordinator before installation.

D. INTERIOR FLUSH WOOD DOOR REQUIREMENTS

1. MCPS Approved Manufacturers

MCPS recognizes that all manufacturers may not produce identical products. It is MCPS sole decision to review the manufacturers offer to deem if they in fact meet the minimum quality standards of these specifications.

- a. **Masonite Architectural**
- b. **Eggers Industries (Division of VT Industries)**
- c. **VT Industries**

2. General

a. Scope

The Contractor shall be responsible for the removal and disposal of existing doors to be replaced and shall furnish new flush wood veneer doors, hardware and accessories as herein specified and required by MCPS. All Interior Wood Veneer Doors are to be manufactured to the standards of the latest edition of Architectural Woodwork Institute (AWI) Quality Standard. Obtain doors from a single manufacturer to ensure uniformity in quality of appearance and construction, unless otherwise indicated.

b. Coordination

The Contractor shall coordinate the dimensions and details of doors with all existing frames, metal louvers, vision light panels, finish hardware and accessory requirements related with items affecting solid core wood flush doors that may not be mentioned and/or shown within these documents.

c. Shipment

Doors, hardware, and accessories delivered to site shall be inspected by the Contractor for damage. **Damaged units shall be removed from the job site.** Protect doors during transit, storage and handling to prevent soiling and deterioration. Comply with the requirements of referenced standard and manufacturer's written instructions. Individually package doors shall be delivered in plastic bags or cardboard cartons.

d. Storage

1. Store and protect doors in accordance with manufacture's recommendations and "How to Store, Handle, Finish, Install and Maintain Wood Doors" published by the Window and Door Manufacturers Association (WDMA).
2. Doors shall be stored in a designated area chosen by the MCPS Project Coordinator and/or Building Service Staff. Storage spaces shall be in dry locations with adequate ventilation, free from dust and water, and shall permit easy access for inspection and handling. Provide at two inches (2") space between stored units to promote air circulation. Door hardware and accessories shall be stored in a secured locked location. The MCPS Project Coordinator and/or Building Service Staff shall assist the Contractor in providing such a location.

e. Shop Drawings

1. MCPS requires a shop drawing for each project.
2. Shop drawings shall identify at a minimum:
 - a. All door types and sizes.
 - b. Fire and STC ratings.
 - c. Hardware Manufacturer/type.
 - d. Hardware blocking locations and sizes.
 - e. Vision panel and louvers manufacturer, cut out sizes and locations.
 - f. Pre-finish system type and approved colors.
 - g. Hardware mounting heights, **MasterSpec 08710**.

f. Design and Fabrication

1. Fabricate flush wood doors in sizes to fit existing project conditions.
2. Factory Pre-Machined doors for hardware that is not surface applied including all function holes, raceways and hinge pilot holes. Locations and hole patterns to comply with specified hardware manufacturer's template and requirements of NFPA 80 if it applies. Comply with door manufacturer requirements to maintain full warranty.
3. Specific locations for hardware will be coordinated between frame and door manufacturer. Location of hardware will be placed to assure the door warranty is not voided. Manufacture defined light-lock conflicts are to be followed to maintain both warranty and fire label requirements.

- a. Specific hardware preps will be per hardware schedule(s) provided unless in conflict with warranty or fire label. Hardware preps to be neatly and cleanly squared as required per hardware templates.
 - b. Metal astragals and metal channels to be supplied where fire ratings will not allow metal-free edge(s).
4. Custom fit on site, doors to suit existing frame opening sizes to AWI Standards and with the manufacture's recommended uniformed clearances and bevels unless otherwise indicated.
- g. Factory Finishing
1. Comply with referenced AWI quality standards requirements for factory finishing
TR-6 Premium Grade.
 2. Finish wood doors at factory.
 3. Staining

Doors shall be provided by the manufacturer with the stain color to match existing doors. The MCPS Project Coordinator will select from manufacturer's standard color chart to match as close as possible.
 4. Sheen shall be Satin.
- h. Examination
1. Examine interior flush wood doors with existing door frames before installing hardware and accessories.
 - a. Do not install doors in frames, which would hinder the proper operation of the doors. The Contractor shall make corrections to existing frames as required, e.g., repair hinge pockets, and secure loose frames, etc., prior to installing doors.
 - b. Verify that the new interior flush wood doors comply with requirements of type, size, location, and swing to existing door frames in which they shall be installed.
 - c. Reject doors with defects and replace with new.
 - d. Restore finish after installation and fitting and/or machining is required on project site.
 - e. Proceed with door hardware and accessories only after any unsatisfactory conditions have been corrected, e.g., loose frame, etc.
- i. ADA Hardware Items

Hardware items providing accessibility and usability for the physically handicapped shall comply with the Americans with Disabilities Act Accessibility Guidelines (ADAAG).

j. Installation of Doors

Install in accordance with requirements of FMA, AAMA and WDMA Standard Door Installation Standards and manufacture installation requirements.

k. Adjusting, Cleaning and Protection

1. Wood doors that are hinge bound, not swinging freely, or otherwise operating improperly shall be re-hung; replace door(s) if deficiencies cannot be corrected by re-hanging.
2. Protect doors to minimize damage or deterioration prior to completion and acceptance by MCPS.
3. Refinish or replace doors damaged during construction to the satisfaction of the MCPS Project Coordinator.
4. Project and work areas shall be clean, and all overstock material, tools and equipment shall be removed upon completion or notified by Project Coordinator.

3. Non-Rated Interior Flush Wood Doors

a. Door Grade and type

Premium Grade A Flush Wood Veneer Door; solid staved lumber core 5ply (SLC-5), 1³/₄" thick, type 1 Adhesive (face veneer to core).

b. Veneer

1/42" minimum Oak or Birch veneer (mostly used - others upon request), plain sliced and book match-stain grade. Veneer leaves a minimum nominal width of five inches (5").

c. Vertical Edges

1-3/8" stiles - 3/4" hardwood matching face material, 5/8" matching structural composite lumber bonded to core with a 3 degree bevel on both stiles.

d. Horizontal Edges

1' rails (solid lumber) must be present on all doors with grain running perpendicular to stiles.

e. Crossbands

1/16" One Piece High Density Fiber Board full width and length (rail to rail) of door. Edges of Crossband not to be visible between face veneer and stiles.

4. Fire-Rated Interior Flush Wood Door Requirements

a. Comply with Positive Pressure Standards. Positive pressure labeled doors to be category A.

1. Core, Veneer, and Cross bands

Will be the same for non-rated door specs unless a special core is required to label at the required fire protection levels.

2. Stiles (Vertical Edges)

Provide manufacturer's standard solid edge construction approved for each fire protection level with improved screw holding capability of not less than 800 lbs. and split resistance not less than 690 lbs. Special treated stiles must be covered with matching veneer or veneer compatible to the face veneer species.

3. Rails (Horizontal Edges)

Rails are solid lumber or other material contained in the manufacturer's fire door approvals.

4. Mineral Blocking

Require doors with fire core construction for all surface-mounted hardware as specified.

- a. Minimum five-inch (5") top blocking required for all fire doors having surface-mounted closers.
- b. Provide seven-inch (7") top blocking for all doors using parallel mounted closers.
- c. Provide two (2) lock blocks, four and one-half inches by ten inches (4 1/2" x 10") for all exit devices.
- d. Minimum five inch (5") bottom blocking required for all fire doors having surface mounted or mortised hardware within six inches (6") of the floor.

5. Pairs

Provide fire-rated pairs with fire-retardant stiles matching face veneer that are labeled without formed-steel edges and astragals. Provide meeting stiles with all concealed intumescent seals the label requires.

6. Comply with NFPA 80 and 101 for fitting clearances of fire rated doors.
5. Sound Retardant Flush Wood Door Requirements
 - a. In music rooms provide sound retardant doors with a minimum Operable STC 45 Provide doors with the automatic door bottom and sound gasketing required to meet the tested STC level.
 - b. Core, veneer and crossbands will be the same as non-rated door spec unless a special core is required to meet minimum SCT 45.
 - c. Comply with most current ASTM E 90. Provide certification of testing by an independent testing lab to the MCPS Project Coordinator.

E. DOOR ACCESSORIES FOR METAL AND WOOD DOORS

1. All doors shall have the following accessories and all hardware is to be through bolted, no self-tapping screws on any hardware.
 - a. Door Closer
 1. **LCN 4040 series or Hager 5100 series** with selective hold open arm to be mounted in the parallel position.
 2. Closer shall be factory pre-adjusted and field adjusted by the Contractor if necessary to comply with the manufacturer's recommended installation instruction. Closing speed should be five (5) seconds for middle and high school and seven (7) seconds for elementary schools.
 - b. Exit Device
 1. **Von-Duprin 98 series or Sargent 8800 series rim type or Hager 4500 or 4700** stainless steel finish (some may require key application).
 2. Provide a standard pull plate mounted on the opposite side of the door upon approval by MCPS. All trim shall be bolted by means of concealed fasteners and thru-bolted.
 3. Fire Exit devices shall be certified by Underwriters Laboratory and be in compliance with positive pressure standards UL 10C.
 - c. Hinges
 1. **McKinney TB 2714 or Hager BB 1279 NRP (ball bearing type) 4-1/2" x 4-1/2"** with a non-removable pin.
 2. Top surface mounted reinforced hinge: **heavy-duty Markar Products #B1923 finish- US2G or Hager 253 will be installed on all exit doors when Butt Hinges are used.**

3. A **Heavy Duty Roton or MCPS-approved equal continuous type hinge** may be considered in certain situations only when approved by MCPS Project Coordinator.
4. All hinge types shall be discussed and selected by the MCPS Project Coordinator prior to installation by the Contractor. Any hinges installed prior to MCPS approval will be subject to removal at no cost to MCPS.

d. Window Light

1. Supply to match the existing door unit or side light panel as required at each location.

Window light sizes and locations are to be determined by the Project Coordinator.

- a. 4" x 25" metal frame with 1/4" laminated safety glass.
 - b. 20" x 30" metal frame with 1/4" laminated safety glass.
 - c. All vision panels must meet fire and STC labels when required.
2. **Snap-On frames are NOT acceptable.**
 3. All metal frames shall be screwed together design. Frames shall be painted as required. The fastener side of the frame should be on the interior of the building.

e. Cylindrical Entry Lockset

1. **BEST Peaks System 9K Series** with construction-type core to be installed on exterior doors where applicable. The existing lock with core will be given to the MCPS Project Coordinator when removed, who will arrange for an MCPS Locksmith to reinstall the new core into the new lock. MCPS is responsible for re-keying and installing permanent cores.
2. All other lock sets shall match the existing lock sets in the facility and be re-keyed to the school inside master key where required. MCPS will provide bitting codes or lock information for contractor to provide locks for projects.

f. Surface Bolts

Ives SB453-US26D or Hager 275D or MCPS approved equal.

g. Weather Stripping/Gasketing

1. Aluminum jamb-up seal – **National Guard Product (NGP) 160V or Hager 871V.**

2. All exterior doors require two (2) door sweeps, use a **National Guard 199NA or Hager 754S0** or MCPS approved equal on the inside of doors and **National Guard C627A or Hager 77058** or MCPS approved equal on the outside of doors.

h. Kick Plates

Kick plates and armor plates shall be .050 inch minimum thickness stainless steel US32D. Plates beveled on three (3) sides (B3E), predrilled and countersunk with stainless steel screws 5/8" minimum.

i. Threshold

1. Heavy duty aluminum, configurations and lengths to meet application requirements. MCPS approved manufacturers and models are: **Pemko – 1716, National Guard – 426HD and Hager – 627S.**
2. All thresholds to be set in solid masonry or hydraulic cement or bedded in commercial rubber sealant. All thresholds shall be anchored to concrete and sealed to jambs with commercial rubber sealant. Thresholds must be sealed to prevent the passage of air, water, and insects. All products cement, sealant, etc. shall be submitted for approved by the MCPS IAQ representative prior to installation by the contractor.

j. Metal Louvers for Doors

1. As provided by the door manufacturer to comply with the following specifications:
 - a. Blade Type – Vision proof, inverted V spaced for maximum privacy.
 - b. Galvanized steel 0.0396 inch thick, hot- dip zinc coated and factory primed and painted.
 - c. Color – Beige using premium grade enamel paint or approved by MCPS Project Coordinator.
 - d. Metal door louvers shall be installed on bathroom, closet and storage doors as required.
 - e. Louvers shall be **NGP FLDL-SG1** or MCPS approved equal for fire rated louvers and **NGP L-A700** or MCPS approved equal for no vision and partition louvers.

k. Push and Pull Plates

1. Push and Pull Plates as manufactured by **Trimco Series 1807-4SP** is the only approved manufacturer at this time.
2. Size – 4" x 16" and 6" x 18" for bathrooms.

3. All plates shall be drilled and countersunk approximately six inch (6") on centers. All plates shall be furnished with stainless steel Phillip`s head screws with undercut heads to insure a tight bond on any type door. All plates shall be packaged in individual envelopes clearly marked and sized. All material shall be properly packaged to protect the finish.
 4. All products shall comply with ANSI/BHMA standards A156.6 and A156.18.
 5. All push and pull plates shall have radius corners.
 6. All push plates shall be a minimum thickness of .125".
 7. All pull plates shall be a minimum thickness of .125".
 8. All push and pull plates shall comply with ADA requirements.
- l. Manual Flush Bolts and Coordinators
1. Manual Flush Bolts and Coordinators as manufactured by **Trimco is the only approved MCPS manufacturer at this time.**
 2. All flush bolts are to be furnished for pairs of doors as specified by MCPS Project Coordinator. Furnish minimum length of twelve inches (12") for all rods except where any door is higher than seven feet (7'). Furnish the top bolt in length sufficient to locate the flush bolt operator no more than six feet (6') above the finished floor. Comply with ANSI A115.4 door and frame preparation. Furnish standard strikes with wrought aluminum boxes for top bolts. Furnish dustproof strikes for bottom bolts.
- m. Door Silencers
1. Door Silencers as manufactured by **Ives Series SR64** or approved equal.
 2. Furnish for all hollow metal frames, three (3) door silencers for every single door, and two (2) each for each pair of doors.
- n. Overhead Holders and Stops
1. Overhead Holders and Stops as manufactured by **Glynn – Johnson Series 450.**
 2. Furnish surface-mounted overhead holder/stop of type and design and function as specified.
 - a. All holders shall be non-handed and furnished complete with proper fasteners.
 - b. All holder arms and channels shall be made of extruded bronze or stainless steel.

- c. Shock absorber to be a shock-absorbing coil steel spring with a rubber insert.
 - d. Furnish steel sex bolts on all wood doors.
 - e. Track end caps shall be metal with a matching finish.
3. All products here within shall comply with the standards of ANSI/BHMA A156.8.
- o. Pull/Handles
- 1. Pull/Handles as manufactured by **Trimco Series 1097HA-RC-SP and 1096HA-RC-SP**.
 - 2. Furnish pulls of the design, type, and finish as specified by MCPS Coordinator, designed to be compatible with exit devices.
 - a. Pulls shall have trim bolts with no exposed fasteners.
 - b. Pulls shall be 1/8" thick stainless steel with features as specified.
 - c. Pulls shall comply with ADA requirements.
- p. Mortise Locks and Latches
- 1. Furnish mortise-type locksets and latch sets with anti-friction deadlocking latch bolts. All locksets and latch sets shall be furnished complete with trim, armor fronts and 6-pin cylinders, concealed fastenings, washers, and bushing.
 - a. Provide a minimum 3/4" throw stainless steel latch bolts.
 - b. Provide a minimum 1" stainless steel deadbolt with hardened steel rollers.
 - c. All levers shall be solid cast.
 - 2. The specified manufacturer(s) shall be certified and in compliance with the latest edition of ANSI/BHMA A156.13 standards and part of the continuing program of passing prescribed tests and been approved by MCPS.
- q. Heavy Duty Locksets and Latches
- 1. Shall be as manufactured by **Schlage, Sargent, Russwin, Best or MCPS approved equal; no other brands will be accepted**. Lock and latch set for classroom doors, shall have classroom security lock function or approved function by MCPS Project Coordinator.
 - 2. Lock and latch set for bathrooms, mechanical room doors, and main office doors shall match existing and approved by MCPS Project Coordinator.

- a. Thumb turn lock on the interior side of the door must be an un-lock operation only.
 - b. Heavy-duty cylindrical locksets shall be in accordance with the latest edition of ANSI/BHMA A156.2.
- r. Keys and Keying
- a. The specific keying requirements are to be determined in consultation with the MCPS Project Coordinator and school administration. The specific keying requirements approval by the MCPS Project Coordinator shall be required prior to the Contractor purchasing the locksets and cylinders from the manufacturer.
 - b. **All locksets shall be Grand Master, Master and Sub-Master keyed, unless otherwise specified.**
 - c. All keys shall be nickel silver.
 - d. All master and grand master keys shall be stamped **Do Not Duplicate**.
 - e. Stamp all keys with the key symbol code.
 - f. **Best** Cylinders shall be used at all locations where Best cores are found in the existing conditions. The Contractor shall supply construction cores and MCPS will supply and install permanent **Best Kaba** cores, MCPS-B2 Keyway.
 - g. The Contractor shall attach a key tag to each key and shall mark thereon the key symbol, key biting number, and room description number.
 - h. If the Project is 50% or more of the school's total door count, the Contractor shall organize and re-establish the existing facility key box and coordinate this task with the building Administrator and MCPS Project Coordinator.

F. METAL DOOR FRAME REQUIREMENTS

- 1. Exterior Metal Door Frames
 - a. Welded type Hollow Metal Door Frames shall have thermal break, double rabbet design 14 gauge cold-rolled sheet steel as specified with the stop a minimum 5/8" in depth.
 - b. All anchors and accessories to be hot dip galvanized and approved by MCPS Project Coordinator.
 - c. Hinge reinforcements shall be 7 gauge, 1-1/4" x 10" minimum size.
 - d. Strike reinforcement shall be 16 gauge minimum.

- e. Closer reinforcement shall be 12 gauge minimum.
- f. All welding on exposed surfaces shall be dressed flush, smooth and neat in appearance.
- g. All welding should be primed promptly after dressing before painting.

2. Interior Metal Door Frames

- a. Welded type Hollow Metal Door Frames shall be of a double rabbet design – 16 gauge cold-rolled sheets steel as specified with the stop a minimum 5/8” in depth.
- b. See Detail Specification Section F, Metal Doors and Frame requirements; 1; b through h.

G. WINDOWS AND WINDOW WALL FRAME REQUIREMENTS

1. This section includes the requirements for the following types of windows:

- a. Single Hung (AW-Architectural Grade) (Thermally Broken)
- b. Double Hung (AW) (Thermally Broken)
- c. Slider (AW) (Thermally Broken)
- d. Projected-In (Hopper) Windows (AW) (Thermally Broken)
- e. Fixed (AW) (Thermally Broken)
- f. Casement (AW) (Thermally Broken)
- g. Fixed Hollow Metal

2. General Requirements

Contractor shall remove and dispose of window/window walls to be replaced. Furnish, deliver and install aluminum finish window units and accessories as specified. **All windows, including prefabricated aluminum frames, hollow metal frames, supplied under this contract shall include double “low-e”, minimum 1” insulated glass the glass unit shall meet a minimum energy rating of R-5 in “Thermally Broken Systems”.** Supply all frame adapters, sill extenders, sub sills, clips, fasteners, panning, flashing etc., to provide a complete and finished system installation as conditions warrant.

3. Aluminum Windows and Walls

a. Acceptable Manufacturer/Products

- 1. **Kawneer** Single Hung: 8430 Series

- Double Hung: 8450 Series
Slider: 8470 Series
Projected: 8225TL Series
Fixed: Provide fixed units as appropriate to the respective frame sizes above, and of an equivalent performance level as warranted matching the respective unit series performance levels for each unit series described above.
2. **EFCO** Single Hung: 660 Series
Double Hung: 670 Series
Slider: 6555 Series
Projected: 550 Series
Fixed: Provide fixed units as appropriate to the respective frame sizes above, and of an equivalent performance level as warranted matching the respective unit series performance levels for each unit series described above.
3. **TRACO** Single Hung: TR9100 Series
Double Hung: TR9000 Series
Slider: TR6800
Projected: TR2400/TR2500 Series
Fixed: Provide fixed units as appropriate to the respective frame sizes above, and of an equivalent performance level as warranted matching the respective unit series performance levels for each unit series described above.
4. **Wausau** Single Hung: 310I Series
Double Hung: 3100 Series
Slider: 4100 Series
Projected: 2250 Series
Fixed: Provide fixed units as appropriate to the respective frame sizes above, and of an equivalent performance level as warranted matching the respective unit series performance levels for each unit series described above.
5. **Quaker** Single Hung: T300 Series
Slider: E300 Series
Fixed: Provide fixed units as appropriate to the respective frame sizes above, and of an equivalent performance level as warranted matching the respective unit series performance levels for each unit series described above.
6. **Winvent** Projected: 350 Series
7. **Winco** Projected: 1150 Series
Casement: 4410H Series
Fixed: Provide fixed units as appropriate to the respective frame sizes above, and of an equivalent performance level as warranted

matching the respective unit series performance levels for each unit series described above.

NO OTHER MANUFACTURERS WILL BE CONSIDERED FOR THIS BID AT THIS TIME.

4. Submittals

a. General

Submit the following in accordance with the General Conditions.

b. Product Data

Submit installation and manufacturer literature.

c. Samples

The apparent low bidder will be required to supply samples as noted below within five (5) work days after MCPS request:

1. Extrusion

Twelve-inch long frame section with corner assembly.

2. Color Selection

Manufacturer's full range of actual 1-inch x 2-inch (minimum) color samples for initial selection purposes; minimum of 20 choices.

3. Color Verification

Following MCPS' color choice selection submitted corner assembly sample of window with selected finish system color applied.

d. Shop Drawings

The apparent low bidder may be required to supply shop drawings prior to contract award for each assigned project as requested by MCPS that shall include the following:

One-fourth inch scale (minimum) elevations and 3" scale (minimum) details of all windows, including the following:

1. Provide elevations of each window assembly (dimensioned).
2. Provide installation and erection details including construction of all parts, aluminum thickness, connections, anchorage and fastening sealing methods.

3. Provide sections of typical members including frame sizes, glass size, spacing of anchors and fasteners and details of accessories.
4. Indicate coordination with existing conditions for replacement window assemblies.
5. Provide schedule of windows identifying typical window types per school.
6. Glass and glazing shall be submitted concurrently for coordination.
7. The Contractor shall list exact size of glass and procedure for re-glazing.

e. Other

Certificates: Manufacturer's certificate that materials meet specification requirements including the following:

1. Air Infiltration – per ASTM E283
2. Water Infiltration – per ASTM E547 & E331
3. All products to be American Architectural Manufactures Association (AAMA) and Window and Door Manufactures Association (WDMA) certified and labeled. Any windows from the approved manufacturers, that are not AAMA certified/labeled; Contractor shall be required to provide a letter of certification from the manufacturer of the window supplied on a job-by-job basis certifying and stating that the windows (including configuration, extrusion and hardware changes) will meet or exceeds the specified AAMA performance criteria as verified by required testing. Test reports are to be included as part of the submittal package for all windows supplied.
4. Life cycle testing per AAMA 910-10.

f. Project Closeout

Maintenance Information: The Contractor shall also include as part of each project, Operations Maintenance and Product Data Manual. The Contractor shall review procedures with MCPS.

5. Quality Assurance

a. Standards

Specifications published by the AAMA & WDMA.

b. Manufacturer's Qualifications

Firm with a minimum of five years' experience successfully producing all windows of type specified for project and with sufficient production capacity to produce required units without causing delay in the work.

c. Installer Qualifications

A single firm shall perform the work of this section and shall have a minimum of five years successful experience in the installation of aluminum windows of type specified for project and be approved by the respective Window Manufacturer.

d. System Performance

1. Conduct tests to certify compliance with the following performance requirements as specified in AAMA/WDMA/CSA 101/LS.2/A440-08.

2. Uniform Load Deflection Test:

a. Conduct in accordance with ASTM E 330-02 (2010).

b. Maximum deflection of frame or sash member shall not exceed 1/175 of the span in any direction when subjected to AAMA specified test pressure both positive and negative.

c. There shall be no damage to fasteners.

3. Water Resistance Test

a. Conduct in accordance with ASTM E331-00 (2009) at static pressure of 10 psf.) No water penetration for 15 minutes when window is subject to rate of flow of five gallon/hour/square feet with differential pressure across window unit of 6.24 psf.

4. Air Infiltration Test

a. Conduct in accordance with ASTM E 283-04 (2012)

b. Maximum infiltration: Fixed Units: 0.06 cfm, @ 6.24 psf.
Operable Units: 0.10 cfm, @ 6.24 psf.

5. Thermal Transmittance Test

a. Conduct in accordance with AAMA 1503.1-09.

b. Combined Thermal Transmittance.

No more than 0.60 BTU/hr/ft²/degree F with 15 mph wind velocity.

6. Condensation Resistance

- a. Conduct in accordance with AAMA 1503.1-09.
- b. Resistance factor (CRF): Not less than 50.

7. Life Cycle Testing Test Sample Preparation

Testing procedures and report content shall comply with AAMA 910-10.

e. Allowable Assembled Tolerances

1. Material Tolerances

- a. Solid extrusions: Minimum nominal metal thickness as required by frame profile not less than 0.125" nominal.
- b. Hollow extrusions: Minimum nominal metal thickness as required by frame profile not less than 0.125" nominal.

2. Size Tolerances: Dimensions within plus or minus 1/16 inches.

6. Materials

a. Aluminum Members

Alloy and temper recommended by the manufacturer for strength, corrosion resistance, and application of required finish; comply with ASTM B 221 for aluminum extrusions, ASTM B 209 for aluminum sheet or plate, and ASTM B 211 for aluminum bars, rods and wire.

1. Framing and Sash members: Extrusions, not less than 0.125" nominal inches thick, designed to form entire interlocking frame assembly secured with no exposed screws, providing weather-tight connection while allowing expansion and contraction. All members shall be thermally broken.
2. Panning, flashing and Trim: Extruded aluminum designed for interlock with framing, not less than 0.062 nominal inches thick, secured with no exposed screws.

b. Fasteners

All exposed fasteners shall be either aluminum or stainless steel in accordance with ASTM A164. Exposed surfaces shall match color of frame material. No plated steel fasteners shall be allowed.

7. Finish

a. General

1. Color to be selected by the MCPS Project Coordinator from manufacturer's color standards or painted by Contractor to match existing facility colors. All paint products used shall be the lowest VOC available from the manufacturer.
2. Sheen: As selected by MCPS.

b. Aluminum Finishes

All exposed surfaces shall be free of scratches or other blemishes and shall be finished using manufacturer's standard two-coat, thermo cured, full strength 70% PVDF resin "Kynar 500" (basis of design) coating complying with AAMA 2605; total dry film thickness of 0.9 mil (minimum).

c. Steel Hollow Metal Finishes

Manufacture primed and finish with Sherwin & Williams or MCPS approved equal direct to metal latex as specified by the manufacturer.

8. Windows Fabrication

a. General

All products to be "AW-Architectural Grade" quality per AAMA AW-50 (minimum). Provide unit cost percentage of price adjustment under item #7 on the quotation form for all products to be "Architectural Window", AW-50 (minimum). Window units shall be fabricated with an integrally concealed thermal barrier located in a manner, which eliminates metal-to-metal contact and provides a continuous break around the entire perimeter of frame and sash. Reinforcing members and fasteners shall comply with Section 1 of AAMA 101-08.

1. Locking Handles: Projected vents shall have heavy-duty cam type made of nickel-bronze alloy.
 - a. Finish: US26D.
 - b. Provide two locking handles for vents 42" or wider.
2. Operating Arms: Projected vents shall be equipped with factory-installed adjustable sash vent opening limited to control the extension of vent beyond the face of the window frame.
3. Weep Holes: Provide weep holes and internal passages to conduct infiltrating water to the exterior.
4. Joining Components: All mechanical fasteners, welded components, and hardware items shall not bridge thermal barriers. Thermal barriers shall align at all frame and sash corners.
5. No exposed fasteners.

6. Glazinga. General

All window glazing supplied under this contract shall be an IGU (insulated Glass Unit). The IGU shall consist of 2 sheets of tempered glass, a warm spacer and sealed with a hot-melt butyl sealant on all perimeters. Apply a double Low-E coating to the IGU, one coating each on the #2 and #4 sides, all IGU must achieve R-5 rating. Any IGU variance from this spec. must be approved by MCPS before fabrication.

- b. Steel type glazing stops shall be installed tight in the corners and fasteners shall be countersunk.
- c. Butyl tape or equal weather sealant preformed tape approved by MCPS shall be used on both sides of IGU (between IGU and frame and IGU and top trim).
- d. All glazing shall be installed from the inside of building unless approved by MCPS Project Coordinator.

b. Frame

Cope and mechanically fasten each corner maintaining hairline joints, then seal weather tight. Joinery methods shall not discolor or mar finish. Any exposed fasteners must be finished to match the selected frame finish in color and sheen. Any exposed sealant must match the selected frame color and be installed in visually acceptable manner.

c. Vent Sash

- 1. All vent sash extrusions shall be tubular.
- 2. Miter all corners and mechanically stake over solid aluminum 1/4-inch thick corner blocks; set and seal in epoxy maintaining hairline joint. Joinery methods shall not discolor or mar finish. Any exposed fasteners must be finished to match the selected frame finish in color and sheen. Any exposed sealant must match the selected frame color and be installed in visually acceptable manner. No overlap vent. Vent is to be flush with frame.
- 3. Provide a type extruded neoprene weather stripping in extruded races about perimeter of operating sash. Securely join and stake at corners.
- 4. Single Hung sash locks shall be extruded aluminum, spring loaded gravity latch, located at bottom of lower sash.
- 5. Single Hung lift handle shall be extruded, and integral with the bottom sash and continuous.

- d. Stops
Provide factory-installed limit stops at operable vents to control the extension of vent beyond the face of the window frame. Stops shall limit opening to a maximum 6" between the vent and face of the window frame when window is fully opened.
 - e. All exposed window components, except hardware, to have selected factory-applied finish.
 - f. Window components for other types of windows for this bid to be of similar quality to above mentioned projected units.
9. Hardware
- a. Provide manufacturer's standard hardware fabricated from aluminum, stainless steel, carbon steel complying with AAMA 907-12 or other corrosion-resistant material compatible with aluminum; designed to smoothly operate, lightly close, and securely lock aluminum windows sized to accommodate sash or ventilator weight and dimensions. Cadmium-plated hardware is not permitted. Do not use aluminum in frictional contact with other metals. Where exposed, provide solid bronze; extruded, cast or wrought aluminum; die-cast zinc with special coating finish; or nonmagnetic stainless steel.
 - b. Counterbalancing mechanism shall comply with AAMA 902-07.
 - c. Four-bar friction hinges shall comply with AAMA 904.1.
 - d. Heavy duty cam handle locks shall be provided.
 - e. Adjustable limit stops shall be provided.
 - f. Extension operator bars shall be provided where required.
10. Insect Screens (**Special Note: MCPS will specify on each project where screens will be required. Normally screens are required for kitchens or as required by Health code. Contractor is not to automatically order windows with screens**)
- a. General

Design windows and hardware to accommodate screens in a tight-fitting, removable arrangement, with a minimum of exposed fasteners and latches. Locate screens on inside or outside of window as appropriate for window operation. Provide for each operable exterior sash or ventilator in areas specified herein.
 - b. Aluminum Insect Screen Frames

Manufacturer's standard aluminum alloy complying with SMA 1004. Fabricate frames with mitered or coped joints, concealed fasteners, adjustable rollers, and removable PVC spine/anchor concealing edge of frame.

1. Extruded-Aluminum or Aluminum tubular framing sections and cross braces shall be not less than 0.040-inch (1-mm) wall thickness.
2. Finish: Match aluminum window members.
- c. Aluminum wire fabric shall be 18-by-16 mesh of 0.011 inch diameter, coated aluminum wire. Wire-fabric finish shall be natural bright.
- d. Wickets shall be sliding or hinged, framed and trimmed for a tight fit and durability during handling.

11. Inspection

- a. The Contractor shall examine the premises and observe the conditions under which the work will be done or other circumstances, which will affect the contemplated work. The Contractor shall carefully check in the field the existing conditions on site that will affect the completion of the work. Subsequently no allowance will be made in this connection for any error or negligence on the Contractor's part.
- b. Verify that window openings conform to designated replacement units and are plumb, level properly aligned and provide a solid anchoring surface.
- c. Do not proceed with installation until unsatisfactory existing conditions are corrected.
- d. Work involving entering, connecting to, or interrupting services for, or in any way interfering with the normal activities taking place in the existing building or on facility grounds shall be coordinated with the MCPS Project Coordinator prior to performing the work. At least 48 hours advance notice shall be given to MCPS before performing such work, unless directed otherwise by the MCPS Project Coordinator.
- e. The Contractor is advised that all work involving disrupting the use of utilities shall not be carried out until permission has been received from the building staff and the MCPS Project Coordinator.

12. Product Storage and Handling

- a. Store windows in upright position off ground on dunnage.
- b. Protect from weather and damage.
- c. Store in designated areas as close as possible to point of installation.

13. Installation

- a. Comply with manufacturer's instructions for installation of window units and related components. No attachment or fastenings shall be made which penetrate or otherwise adversely affect the thermal break of the window unit.
- b. Set units plumb, level and true line, without warp or rack of frames vent and sash.

14. Protection

Protect window units for the duration of the project so that the units will be free of damage or deterioration (beyond normal weathering) until final acceptance by MCPS.

15. Adjustment

Adjust operating vents or sashes and hardware to provide a tight fit at contact points and at weather stripping for smooth operation and a weather tight closure.

16. Warrantya. General

Comply with the pertinent provisions of the specification for warranties.

b. Manufacturer's standard form in which manufacturer agrees to repair or replace aluminum windows that fails in material or workmanship within specified warranty period. Failures include, but are not limited to the following:

1. Failure to meet performance requirements.
2. Structural failures including excessive deflection.
3. Water leakage, air infiltration, or condensation.
4. Faulty operation of movable sash and hardware.
5. Deterioration of metals, metal finishes, and other materials beyond normal weathering.
6. Insulating glass failure.

c. Warranty period for metal finishes will be 10 years following the date of signed approval of final invoice by MCPS for each singular project.

d. Warranty period for insulating units dual glass seal will be 10 years following the signed approval of the final invoice by MCPS. This will include fogging condensation or any evidence of seal failure. The manufacturer will be required to replace any failed units promptly.

e. Warranty period for installation will be two years following the signed approval of the final invoice by MCPS for each singular project.

17. Window and Frame "Mock-Up"

As requested by MCPS, the successful Contractor may be required at the Contractor's expense to provide one full scale, fully finished "mock-up" of each type window and frame to be used in an actual field location to establish a level of quality. The mock-up sample must be approved by MCPS before complete installation can

proceed. Mock-up windows shall be provided in a timely manner, no more than 30 days after MCPS makes the request.

18. Fiberglass Windows and Walls

a. Acceptable Manufacturer

Basis-of Design Product: Subject to compliance with requirements, provide “Commercial Grade” **Inline Fiberglass Ltd.**; Series 325, or comparable products by one of the following:

1. **Inline Fiberglass Ltd.**
2. **Fibertec Windows**

19. Hollow Metal Steel Window Walls

a. Hollow Metal Window Frames

1. Welded type Hollow Metal window Frames shall be of a double rabbet design – 14 gauge, cold-rolled sheet steel as specified with the stop a minimum 5/8” in depth.
2. All anchors and accessories to be hot dip galvanized and approved by MCPS Project Coordinator.
3. All joints to be notch and welded. All welds on exposed surfaces shall be dressed flush, smooth, and neat in appearance and primed before painted.

d. Insulated Panels

1. Insulated Aluminum panels to be 5 ply consisting of 1” Rigid insulation 2 ply of ¼” plywood, wrapped with Kynan finish aluminum **or**
2. Two (2) double Insulated Aluminum .050 gage skin panels (one on each side) with Polyisocyanurate (2# density, highest insulating value) insulating cores. Panels shall be stabilized with fiber cement board.
3. The space between panels shall be filled with 2” Rigid Foam Board insulation.
4. Color shall be selected by MCPS project coordinator.

APPENDIX A

**MINORITY BUSINESS ENTERPRISE PROCEDURES
FOR
STATE FUNDED PUBLIC SCHOOL CONSTRUCTION
PROJECTS
Revised JULY 2020**

**Approved by the Montgomery County Board of Education on
September 22, 2008.**

**DATE OF ORIGINAL APPROVAL: September 22, 2008
REVISED: October 14, 2008
REVISED: JULY 30, 2020**

These procedures were approved by the Interagency Committee on School Construction on June 26, 2008, revised October 1, 2017, and shall be utilized by each public school system in Maryland as a condition for the receipt of State funds through the Public School Construction Program.

The effective date for implementation for projects in Montgomery County is October 14, 2008.

SECTION 008010 - Minority Business Enterprises (MBE) Memo/Procedures

October 1, 2020

To: All Bidders

From: Donna Hanson, MCPS Minority Business

Enterprise Coordinator Re: Revised MBE

Participation Schedule and Guidelines

Maryland Senate Bill 309

(http://mgaleg.maryland.gov/2017RS/Chapters_noln/CH_438_sb0309e.pdf), effective October 1, 2017, changed the minority business participation requirements. It is imperative that you understand and comply with the new requirements.

- **New Attachment B (sample included herein with explanation) for reporting participation**
- Revision of the supplier (regular dealer vs. broker) participation allowed

New Rules for Minority Business Enterprises (MBEs) Providing Materials and Supplies (Maryland Senate Bill 309) Chapter 438, Laws of 2017

*A bidder may apply only 60% of the costs of the materials and supplies provided by a certified MBE if the MBE is a **regular dealer** for purposes of achieving the MBE contract goal. A "regular dealer" means an MBE that owns, operates, or maintains a store, a warehouse, or any other establishment in which the materials, supplies, articles, or equipment are of the general character described by the specification required under the contract and are bought, kept in stock, or regularly sold or leased to the public in the usual course of business. Generally, a regular dealer will be identified as a wholesaler or supplier in the MBE Directory on the Maryland Department of Transportation website.*

*If materials or supplies are purchased from an MBE who is considered a **broker**, bidders cannot apply any portion of the costs of the materials and supplies toward the MBE goal. However, bidders may apply the entire amount of fees or commissions charged for assistance in the procurement of the materials and supplies, fees or transaction charges for the delivery of materials and supplies required on a*

procurement toward MBE contract goals. The fees must be reasonable and not excessive as compared with fees customarily allowed for similar services.

*If a bidder purchases materials or supplies from a certified MBE who is a **manufacturer** of the materials and supplies, the bidder may count 100% toward meeting the MBE goal.*

*The participation of a certified MBE supplier, wholesaler, or regular dealer certified in the NAICS Code to **furnish and install** materials necessary for successful contract completion may be counted 100% toward meeting the goal.*

The bill defines “regular dealer” to be a firm that owns, operates, or maintains a store, warehouse, or any other establishment in which materials, supplies, articles, or equipment are of the general character described by the specifications required under the contract and are bought, kept in stock, or regularly sold or leased to the public in the usual course of business. A “regular dealer” does not include a packager, broker, manufacturer’s representative, or any other person that arranges or expedites transactions. (SB309)

The MBE Participation Schedule, Attachment B, has been revised to incorporate rows for MDOT certified prime contractor and MDOT certified Regular Dealer/Supplier/Wholesaler. A vendor may apply only 60% of the costs of the materials and supplies provided by the MBE if the certified MBE is a regular dealer for purposes of achieving the MBE contract goal. **For each MBE firm on the Attachment B that is a wholesale trade agent or broker, only the commission or fee for their service may be counted toward minority participation.**

MINORITY BUSINESS ENTERPRISE PROCEDURES FOR STATE FUNDED PUBLIC SCHOOL CONSTRUCTION PROJECTS

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MINORITY BUSINESS ENTERPRISE PROCEDURES FOR STATE FUNDED PUBLIC SCHOOL CONSTRUCTION PROJECTS

BACKGROUND

In 1978, the Maryland General Assembly passed legislation, which was signed into law to establish the State's Minority Business Enterprise Program. This new law set as a goal that at least 10 percent of each unit of State government's total dollar value of procurement contracts for purchases and/or contracts be awarded to minority business enterprises. This law was subsequently modified and the goal was increased to 14 percent. More recently, in 2001, the goal was increased to 25 percent with subcontracting sub-goals of 7 percent for certified African American-owned businesses and 10 percent for certified women-owned businesses.

In 1979, the Rules, Regulations, and Procedures for the Administration of the School Construction Program were revised by the Board of Public Works to require each local board of education to adopt procedures to attempt to include minority business enterprises in State funded school construction projects. The State law was revised and now states: "The Interagency Committee on School Construction (IAC) shall require each local board of education to adopt procedures consistent with this chapter before obtaining funds for public school construction projects".

In May 2007, the Rules, Regulations, and Procedures were replaced by regulations. The regulations concerning project procurement (COMAR 23.03.03) indicate that the State's minority business enterprise goals and procedures apply to all State funded projects, irrespective of procurement method.

OVERVIEW

This Minority Business Enterprise (MBE) procedure document was originally developed in response to a requirement set forth in the Rules, Regulations, and Procedures for the Administration of the School Construction Program. The MBE requirement was originally established under HB 64, which was passed in the 1978 session of the Maryland General Assembly and signed into law as Chapter 575 of the Acts of 1978.

Since the Board adopted its original Minority Business Enterprise Procedures, there have been changes in State statutes, regulations adopted by the Board of Public Works, procedural requirements, project eligibility requirements and the level of State participation in school construction projects. This revised procedure is consistent with current legislation and the changes to the Code of Maryland Regulations (COMAR) requirements, effective November 7, 2005 and May 21, 2007.

1.0 PURPOSE

The purpose of the Procedures is to fulfill the intent of the law by setting goals for minority business enterprise participation in every contract that includes State funding through the Public School Construction Program. Local Educational Agencies (LEAs) shall attempt to achieve the result that a minimum of 25 percent of the total dollar value of all construction contracts is made directly or indirectly with certified minority business enterprises when State Public School Construction Program (PSCP) funds are utilized, with a minimum of 7 percent from certified African American-owned businesses, a minimum of 10 percent from certified women-owned businesses, and the balance from any certified minority business enterprises. All general contractors, including certified MBE firms, when bidding as general or prime contractors are required to attempt to achieve the MBE subcontracting goals from certified MBE firms.

2.0 EFFECTIVE DATE

These procedures have been adopted for use in Montgomery County and supersede previously utilized MBE procedures, and will take effect on or after September 22, 2008.

3.0 DEFINITIONS

1. **Certification** means the determination that a legal entity is a minority business enterprise consistent with the intent of Subtitle 3 of the State Finance and Procurement Article.
2. **Certified Minority Business Enterprise** means a minority business that holds a certification issued by the Maryland State Department of Transportation (MDOT).
3. **Corporation**, as defined by MDOT, is an artificial person or legal entity created by or under the authority of the laws of any state of the United States, the District of Columbia or a territory or commonwealth of the United States and formed for the purpose of transacting business in the widest sense of that term, including not only trade and commerce, but also manufacturing, mining, banking, insurance, transportation and other forms of commercial or industry activity where the purpose of the organization is profit. For eligibility for certification, disadvantaged and/or minority individuals must own at least 51 percent of the voting stock and at least 51 percent of the aggregate of all classes of stock that have been issued by the corporation. (Note: stock held in trust is not considered as stock held by the disadvantaged businesspersons when computing the business person(s) ownership.)
4. **Managerial Control**, as defined by MDOT, means that a disadvantaged or minority owner(s) has the demonstrable ability to make independent and unilateral business decisions needed to guide the future and destiny of a business.

Control may be demonstrated in many ways. For a minority owner to demonstrate control, the following examples are put forth, but are not intended to be all inclusive:

- a. Articles of Incorporation, Corporate Bylaws, Partnership Agreements and other agreements shall be free of restrictive language which would dilute the minority owner's control thereby preventing the minority owner from making those decisions which affect the destiny of a business;
 - b. The minority owner shall be able to show clearly through production of documents the areas of the disadvantaged business owner's control, such as, but not limited to:
 - 1) Authority to sign payroll checks and letters of credit;
 - 2) Authority to negotiate and sign for insurance and/or bonds;
 - 3) Authority to negotiate for banking services, such as establishing lines of credit; and
 - 4) Authority to negotiate and sign for contracts.
 - c. Agreements for support services that do not lessen the minority owner's control of the company are permitted as long as the disadvantaged or minority business owner's authority to manage the company is not restricted or impaired.
5. **Minority Business Enterprise (MBE)** means any legal entity, except a joint venture, that is (a) organized to engage in commercial transactions, and (b) at least 51 percent owned and controlled by one or more individuals who are socially and economically disadvantaged including:
 - African Americans;
 - American Indian/Native Americans;
 - Asians;
 - Hispanics;
 - Physically or mentally disabled individuals;
 - Women; or
 - A non-profit entity organized to promote the interests of physically or mentally disabled individuals.
 6. **Minority Business Enterprise Liaison** means the employee of the school system designated to administer the Minority Business Enterprise Procedures for State funded public school construction projects.
 7. **Operational Control**, as defined by MDOT, means that the disadvantaged or minority owner(s) must possess knowledge necessary to evaluate technical aspects of the business entity. The primary consideration in determining operational control and the extent to which the disadvantaged or minority owner(s) actually operates a business will rest upon the specialties of the industry of which the business is a part. The minority owner should have a working knowledge of the technical requirements needed to operate in his/her industry.

Specifically, in the construction industry and especially among small (one to five person firms) contractors, it is reasonable to expect the disadvantaged or minority owner(s) to be knowledgeable of all aspects of the business. Accordingly, in order to clarify the level of operational involvement which a minority owner must have in a business for it to be considered eligible, the following examples are put forth, but are not intended to be all inclusive:

- a. The minority owner should have experience in the industry for which certification is being sought; and
 - b. The minority owner should demonstrate that basic decisions pertaining to the daily operations of the business are independently made. This does not necessarily preclude the disadvantaged or minority owner(s) from seeking paid or unpaid advice and assistance. It does mean that the minority owner currently must possess the knowledge to weigh all advice given and to make an independent determination.
8. **Ownership**, as defined by MDOT, means that:
- a. The minority owner(s) of the firm shall not be subject to any formal or informal restrictions, which limit the customary discretion of the owner(s). There shall be no restrictions through, for example, charter requirements, by-law provisions, partnership agreements, franchise or distributor agreements or any other agreements that prevent the minority owner(s), without the cooperation or vote of any non-minority, from making a business decision of the firm.
 - b. This means that the disadvantaged or minority persons, in order to acquire their ownership interests in the firm, have made real and substantial contributions of capital, expertise or other tangible personal assets derived from independently owned holdings without benefit of a transfer of assets, gift or inheritance from non-minority persons. Examples of insufficient contributions include a promise to contribute capital, a note payable to the firm or its owners who are not minority persons or the mere participation as an employee rather than as a manager. If the ownership interest held by a disadvantaged or minority person is subject to formal or informal restrictions, such as options, security interests, agreements, etc., held by a non-minority person or business entity, the options, security interests, agreements, etc., held by the non-minority person or business entity must not significantly impair the disadvantaged or minority person's ownership interest.
9. **Partnership** means an unincorporated association of two or more persons to carry on as co-owners of a business for profit. For a partnership to be deemed eligible for certification under the MDOT Program, the disadvantaged or minority person's interest must be at least 51 percent of the partnership capital.
10. **Socially and Economically Disadvantaged** means a citizen or lawfully admitted permanent resident of the United States who is socially disadvantaged and economically disadvantaged. The law establishes the level of personal net worth at \$1,500,000, above which an individual may not be found to be socially and economically disadvantaged.
11. **Sole Proprietorship**, as defined by MDOT, is a for-profit business owned and operated by a disadvantaged or minority person in his or her individual capacity. For a sole proprietorship to be deemed eligible for certification under the DBE/MBE Program, the disadvantaged or minority person must be the sole proprietor.

4.0 MBE GOAL SETTING PROCEDURES

1. The MBE program requires that all race-neutral measures be considered before making use of race-based measures. Using a combination of race-neutral and race-based measures for each specific school construction project will help ensure that certified MBE firms are afforded the opportunity to submit bids and be utilized to the greatest extent possible.
2. Race-neutral measures include any action taken by the LEA to make it easier for all contractors, including MBEs, to compete successfully for public school construction project contracts.
3. Race-based measures include setting an overall MBE goal and MBE subgoals, if applicable, based upon race, gender, ethnicity, etc., for a specific project.
4. The overall MBE goal and the subgoals, if applicable, should be set for each specific project, considering but not limited to, the following factors:

- a. The extent to which the work to be performed can reasonably be segmented to allow for MBEs to participate in the project;
 - b. A determination of the number of certified MBEs that potentially could perform the identified work;
 - c. The geographic location of the project in relationship to the identified certified MBEs;
 - d. Information obtained from other State departments/agencies related to establishing a MBE goal and/or subgoals for similar construction projects or work in the jurisdiction;
 - e. Information obtained from other State departments/agencies related to MBE participation in similar construction projects or work in the jurisdiction; and
 - f. Any other activities or information that may be identified as useful and productive.
5. The superintendent or designee shall establish one or more procurement review groups (PRG). The PRG must include at a minimum the MBE Liaison, and the procurement officer (PO) or a representative from the procurement office. The PRG could also include a capital improvement project manager, the project Architect, the cost estimator, the Construction Manager, and/or other individuals selected by the superintendent or designee.
- a. The PRG should communicate and/or meet as needed to consider the MBE subcontracting goal and subgoals, if applicable, for individual projects or groups of projects.
 - b. The PRG should consider the factors cited in 4 above when establishing the MBE goal and subgoals, if applicable, for each project or segmented piece of a project that are reasonable and attainable.
 - c. The PRG must complete and submit a written analysis for each State-funded school construction project with an estimated cost that is expected to exceed \$200,000.
 - i. For State-funded projects that require review of construction documents (CD), the written analysis shall be submitted with the CD documents to the Department of General Services, and will be reviewed by DGS for submission, appropriate signatures, and correspondence between the goal and subgoals, if applicable, indicated in the analysis and those of the procurement documents
 - ii. For State-funded projects that do not require review of construction documents, the written analysis shall be submitted to the Public School Construction Program, and will be reviewed by the PSCP for submission and appropriate signatures.
 - iii. For locally funded projects that are anticipated to be requested for State approval of planning and funding, the written analysis shall be submitted with the CD documents to the Maryland State Department of Education, and will be reviewed by MSDE for submission, appropriate signatures, and correspondence between the goal and subgoals, if applicable, indicated in the analysis and those of the procurement documents. Submission of this document is a pre-conditions for recommendation for State approval of planning and funding when submitted in an annual CIP.
 - d. For projects estimated to cost between \$50,000 and \$200,000 the same analysis form is to be completed and submitted. This could be a responsibility of the PRG, but could be performed by others as well.
 - i. For State-funded projects that require review of construction documents (CD), the written analysis shall be submitted with the CD documents to the Department of General Services, and will be reviewed by DGS for submission, appropriate signatures, and correspondence between the goal and subgoals, if applicable, indicated in the analysis and those of the procurement documents.
 - ii. For State-funded projects that do not require review of construction documents, the written analysis shall be submitted to the Public School Construction Program, and will be reviews by the PSCP for submission and appropriate signatures.
 - e. If the project cost is estimated to exceed \$200,000, then a copy of the written analysis shall also be sent to GOMA at the same time that the written analysis is submitted to the DGE or PSCP.
 - f. The PRG should consult with local counsel for the Board of Education as needed.
5. It is recognized that by utilizing the factors cited in 4 above, the MBE goal and/or subgoals, if applicable, for a specific project or portion thereof may be significantly higher than the overall goals of the program (25%

overall, with 7% from African American-owned businesses and 10% from women-owned businesses). It is also recognized and possible that there will be MBE goals set that are lower than those stated above or even that no MBE goal and/or subgoals will be set for a specific project or the segmented piece of the project.

6. Assistance in reviewing the factors cited in 4 above and setting a goal and/or subgoals, if applicable, for specific projects or a segmented piece of a project can be obtained by contacting the Public School Construction Program and/or the Governor's Office of Minority Affairs.

5.0 IMPLEMENTING PROCEDURES - \$50,000 OR LESS

For construction projects estimated to cost \$50,000 or less, the following procedures will be utilized

1. A MBE goal and/or MBE subgoals are not required to be set for contracts that are anticipated to be for \$50,000 or less.
2. All advertisements, solicitations, and solicitation documents shall include the following statement:
 - a. "Certified Minority Business Enterprises are encouraged to respond to this solicitation."
3. To encourage greater MBE participation the staff of the school system should send out notices of potential projects and a specific project to MBEs to solicit bids or proposals directly from minority business enterprise contractors that are certified.
4. A copy of the solicitation notice, preferably electronically, shall be sent to the Governor's Office of Minority Affairs at the same time the advertisement for the solicitation is released.
5. When a pre-bid or pre-proposal conference or meeting is held, the MBE liaison or designated representative shall explain that all bidders or offerors are encouraged to utilize certified MBEs for this project or segments of the project.
6. Upon request for a specific project, the school system shall provide one set of drawings and specifications (and addenda when issued) to minority business enterprise associations recognized by the Governor's Office of Minority Affairs. They will be available free of charge to be picked up at a location designated by the LEA. A review of the bid or proposal activity submitted by an association's members may be initiated to justify continuation of this service.
7. Minority Business Enterprise forms identified in Section 6.0 of this procedure for projects over \$50,000, are not required to be submitted for these projects (\$50,000 or less).
8. The names of prime contractors obtaining drawings and specifications will be shared with certified MBEs and MBE associations, upon request.
9. At the time of the contract award, the MBE Liaison or a designated person will record any anticipated certified minority business enterprise participation data made available from the successful contractor.
10. A business that presents itself as a minority business may participate in a project but may not be counted toward MBE participation until it is a certified minority business enterprise. If the MBE is not certified at the time of contract award, it may not be counted at that time. Only the funds paid after MDOT certification can be counted as MBE participation in the project. If a certified MBE fails to meet the standards specified in State Finance and Procurement Article 14-301 (G) and (I), Annotated Code of Maryland, the payments made to the MBE can be recorded and counted under a contract entered into when the MBE was eligible and certified. Ineligibility of an MBE to participate in the MBE program may not be the sole cause of the termination of the MBE contractual relationship for the remainder of the term of the contract.
11. The contractor will complete the Standard Monthly Contractor's Requisition for Payment (IAC/PSCP Form 306.4), specifically page 3 of 16, Minority Business Enterprise Participation, with each requisition submitted for payment. If certified MBE firms are known at the time of contract award their names and other appropriate information should be entered on page 3 of the first and all subsequent requisitions for payment. Any MBEs identified during the life of the project should be added as soon as the contractor engages them.

12. Upon completion of the project the contractor will provide a summary of the total of all funds paid to certified MBE firms. This should be within the contractor's final requisition for payment.

6.0 IMPLEMENTING PROCEDURES - Over \$50,000

For construction projects estimated to cost in excess of \$50,000, the following procedures will be utilized:

1. All advertisements, solicitations, and solicitation documents shall include the following statements:
 - a. "Certified Minority Business Enterprises are encouraged to respond to this solicitation notice."
 - b. "The contractor or supplier who provides materials, supplies, equipment and/or services for this construction project shall attempt to achieve the specific overall MBE goal of ____ percent established for this project. All prime contractors, including certified MBE firms, when submitting bids or proposals as general or prime contractors, are required to attempt to achieve this goal from certified MBE firms."
 - c. If subgoals have been established for this project then one of the following should be included:
 - 1) "The subgoals established for this project are ____ percent from African American-owned businesses and ____ percent from woman-owned businesses."
 - 2) "The subgoal established for this project is ____ percent from African American-owned businesses."
 - 3) "The subgoal established for this project is ____ percent from woman-owned businesses."
 - d. "The bidder or offeror is required to submit with its bid or proposal a completed Attachment A - Certified MBE Utilization and Fair Solicitation Affidavit and Attachment B - MBE Participation Schedule, as described in the solicitation documents.
 - e. If there is no overall MBE goal or MBE subgoals established for the project, then only 1.A. above is to be included.
2. Other Advertisement and Outreach Requirements
 - a. To encourage greater MBE participation the staff of the school system should send out notices of potential projects to MBEs or solicit bids or proposals directly from minority business enterprise contractors that are certified.
 - b. A copy of the solicitation notice, preferably electronically, shall be sent to the Governor's Office of Minority Affairs at the same time the advertisement for the solicitation is released.
 - c. Upon request for a specific project, the school system shall provide one set of drawings and specifications (and addenda when issued) to minority business enterprise associations recognized by the Governor's Office of Minority Affairs. They will be available free of charge to be picked up at a location designated by the LEA. A review of the bid or proposal activity by an association's members may be initiated to justify continuation of this service.
 - d. When a pre-bid or pre-proposal conference is held, the MBE Liaison or designated representative shall explain the MBE goal and subgoals, if applicable; the MBE provisions of the solicitation; the documentation required at the time of submission; its relationship to the responsiveness of the bidder or offeror; how to complete the required attachments, particularly A, B, and C; and additional information and supporting documentation that may be required after the bid or proposal opening. All contractors who attend the pre-bid or pre-proposal conference should receive a list or information explaining how to obtain a listing of certified MBE firms who could perform the work or have expressed an interest in performing the school construction work required for the specific project in the jurisdiction.
 - e. The names of prime contractors obtaining drawings and specifications will be shared with certified MBEs and MBE associations, upon request.
 - f. The MBE liaison, in conjunction with the procurement officer or project staff, should respond to all applicable questions and concerns relating to the project's MBE requirements completely and in a timely fashion to ensure that all potential contractors and sub-contractors can compete effectively.
3. All Solicitation Documents Shall Include the Following:
 - a. "Certified Minority Business Enterprises are encouraged to respond to this solicitation notice".
 - b. "The contractor or supplier who provides materials, supplies, equipment and/or services for this construction project shall attempt to achieve the result that a minimum of __ percent of the total contract value is with

certified Minority Business Enterprises, with a minimum of __ percent from certified African American-owned businesses, a minimum of __ percent from certified women-owned businesses, and the balance from any certified Minority Business Enterprises. All contractors, including certified MBE firms, when submitting bids or proposals as prime contractors, are required to attempt to achieve the MBE goal and subgoals, if applicable, from certified MBEs". Note: see 6.1.C. above for variations that may be required.

- c. Each bid or offer submitted, including a submittal from a certified MBE in response to this solicitation, shall be accompanied by a completed Attachment A - Certified MBE Utilization and Fair Solicitation Affidavit and a completed Attachment B - MBE Participation Schedule. These two attachments must be accurate and consistent with each other.
 - 1) Attachment A and Attachment B shall be submitted with the sealed bid price or proposal at a place, date, and time specified in the solicitation document.
 - 2) As an alternative, and at the discretion of the school system, Attachment A could be submitted with the sealed bid price or proposal at a place, date, and time specified in the solicitation document. The sealed bids or proposals received by the time specified could be held, unopened for a maximum of 30 minutes. Within that time (30 minutes) each bidder or offeror must submit Attachment B, in a separate sealed envelope. The sealed price envelopes from each bidder or offeror who submits both the sealed bid or proposal and the envelope with Attachment B will then be opened and reviewed and recorded as a viable submission. Any contractor that fails to submit the second envelope, with Attachment B, prior to the specified time allowed (30 minutes) after the submittal of the sealed bid or proposal will be deemed non-responsive and the sealed bid or proposal will not be opened or considered.
- d. The submittal of a completed and signed Attachment A - Certified MBE Utilization and Fair Solicitation Affidavit and a completed and signed Attachment B - MBE Participation Schedule indicates the bidder's or offeror's recognition and commitment to attempt to achieve the MBE goal and/or MBE subgoals, if applicable, for the specific project.
 - 1) The bidder or offeror recognizes that their efforts made to initiate contact, to solicit, and to include MBE firms in this project will be reviewed carefully and evaluated based upon the actions taken by them prior to and up to 10 days before the bid or proposal opening. Follow-up actions taken by the bidder or offeror within the 10 days prior to the bid opening will also be considered.
 - 2) Based upon this review and evaluation it will be determined, by the MBE liaison, procurement officer, or a designated person, if a good faith effort was made by the apparent low bidder or apparent successful offeror.
- e. The bidder or offeror must check one of the three boxes on Attachment A, which relates to the level of MBE participation achieved for the project. The bidder's or offeror's signature indicates that in the event that they did not meet the MBE goal or subgoals, if applicable, that:
 - 1) They are therefore requesting a waiver, and
 - 2) Documentation of their good faith efforts will be provided to the school system staff within 10 days of being notified that they are the apparent low bidder or apparent successful offeror.
- f. The bidder or offeror must submit Attachment B (as and when described above), which lists and provides information related to each certified MBE firm that the bidder or offeror will utilize on this project. A completed and accurate Attachment B is required. All of the work specified to be performed by each MBE firm, the contact information, MDOT certification number, minority code, the dollar values, and percentages must be correct.
- g. Attachment B should be completed and submitted with all calculations utilizing the base bid or offer only. A revised Attachment B should be submitted by the successful bidder or offeror once a determination is made as to the acceptance and/or rejection of any alternates.
- h. If a request for a waiver has been made, the appropriate box on Attachment A has been checked and the attachment signed, then the LEA should obtain and review the apparent low bidder's or successful offeror's supporting documentation of the good faith efforts to justify the granting of the waiver, prior to submitting the contract award for approval to the board of education.
- i. The following documentation shall be considered as part of the contract, and shall be furnished by the apparent low bidder or successful offeror to the MBE Liaison or designated person, within ten (10) working days from notification that the firm is the apparent low bidder or successful offeror:

- 1) A completed Attachment D - Minority Business Enterprise Subcontractor Project Participation Statement shall be completed and signed by the prime contractor and each MBE firm listed on Attachment B - MBE Participation Schedule and Attachment C - Outreach Efforts Compliance Statement shall be signed and completed by the bidder or offeror.
- 2) Notification for purposes of this procedure means the earliest of the following methods of communication: orally in person, orally by telephone, orally by a telephone message, a faxed communication, a letter by date received or an electronic communication.
- 3) The ten (10) working days do not include the day the notification is received, weekends or holidays (State or Federal), but the material submitted must be received by the close of business on the tenth day.
- 4) The requirement to submit the above-listed documentation within the time frame specified will be considered by the IAC in its review of the request for contract award for the project. Failure to submit the required documentation within the time frame specified may result in a delay of the approval of the award of the contract, or the materials being returned without the approval of the award of the contract.

4. Waiver Procedures

- a. If the apparent low bidder or successful offeror has determined that they are unable to meet the overall MBE goal or subgoals, if applicable, for the project at the time of submission of a bid or offer, they must check either of the two boxes on Attachment A. The signature recognizes and acknowledges that a request for a waiver is being made. The apparent low bidder or successful offeror will therefore be required to submit information and substantiating documentation that will be reviewed to justify the granting of a waiver.
- b. If the apparent low bidder or successful offeror is unable to achieve the overall MBE contract goal and/or the MBE subgoals, if applicable, from certified African American-owned businesses and/or from certified women-owned businesses, the apparent low bidder or successful offeror shall submit, within 10 working days from notification that the firm is the apparent low bidder or successful offeror, a completed Attachment C - Outreach Efforts Compliance Statement, Attachment E - Minority Subcontractors Unavailability Certificate, and Attachment F - MBE Waiver Documentation which shall include the following:
 - 1) A detailed statement of the efforts made by the bidder or offeror to identify and select portions of the work proposed to be performed by sub-contractors in order to increase the likelihood of achieving the stated goal;
 - 2) A detailed statement of the efforts made by the bidder or offeror prior to and up to at least ten (10) days before the bid or proposal opening to solicit minority business enterprises through written notices that describe the categories of work for which subcontracting is being solicited, the type of work to be performed and specific instructions on how to submit a bid or proposal;
 - 3) Follow-up actions taken by the bidder or offeror within the 10 days prior to the bid or proposal opening will also be considered.
 - 4) A detailed statement of the bidder's or offeror's efforts to make personal contact with MBE firms identified for item (2) above;
 - 5) A record of the name, address, telephone number and dates contacted for each MBE identified under items (2) and (3) above;
 - 6) A description of the information provided to MBEs regarding the drawings, specifications and the anticipated time schedule for portions of the work to be performed;
 - 7) Information on activities to assist minority business enterprises to fulfill bonding requirements or to obtain a waiver of these requirements;
 - 8) Information on activities to publicize contracting opportunities to minority business enterprises, attendance at pre-bid or pre-proposal meetings or other meetings scheduled by the MBE Liaison or designated representative; and
 - 9) As to each MBE that placed a subcontract quotation or offer which the apparent low bidder or successful offeror considers not to be acceptable, a detailed statement of reasons for this conclusion.
- c. In addition to any waiver documentation the apparent low bidder or successful offeror shall submit one completed Attachment D - Minority Business Enterprise Subcontractor Project Participation statement for each MBE firm that will participate in the project consistent with the information previously provided at the time of the submission of Attachment B or the revised Attachment B.

- d. A waiver of an MBE contract goal or sub goal, if applicable, may be granted by the school system only upon receipt of Attachment C - Outreach Efforts Compliance Statement, Attachment E - Minority Sub-contractors Unavailability Certificate, and Attachment F - MBE Waiver Documentation as described above in items 1) through 9)
 - 1) The MBE Liaison will review and accept or reject the minority business enterprise material that is submitted, and could obtain legal advice or assistance from their attorney.
 - 2) The MBE waiver request may not be considered unless all of the documentation specified above has been submitted in a timely fashion by the apparent low bidder or successful offeror.
 - 3) Assistance in the review of a request for a waiver (the documentation and justifications) may be requested from the Public-School Construction Program and/or the Governor's Office of Minority Affairs.
 - 4) If a determination is made that the apparent low bidder or successful offeror did make a good faith effort, based upon a review of the documentation submitted, then the waiver must be granted. The award of contract shall then be made. The material and information submitted, including the LEA's review and analysis notes and conclusion shall be retained in the project file.
 - 5) If a determination is made that the apparent low bidder or successful offeror did not make a good faith effort, based upon a review of the documentation submitted, then the waiver should not be granted. The material and information submitted, including the LEA's review and analysis notes and conclusion, shall be retained in the project file. The award of contract shall then be made to the next lowest bidder or offeror, who meets the contractual requirements, including the MBE requirements.
 - 6) When a waiver is granted, a copy of Attachment F - MBE Waiver Documentation, accepted and signed by a school system representative and with the reasons for the determination, shall be forwarded to the Governor's Office of Minority Affairs and the Public-School Construction Program within ten (10) days after approval of the contract award by the board of education. Failure to submit the required documentation within the time frame specified may result in delayed approval of the award of contract by the IAC.

5. All Contracts Shall Include The Following:

- a. "The contractor shall perform the contract in accordance with the representations made in Attachment A - Certified Minority Business Enterprise Utilization and Fair Solicitation Affidavit and Attachment B - MBE Participation Schedule, submitted as part of the bid or proposal".
- b. "Failure to perform the contract as specified and presented in the bid or proposal submission without prior written consent of the owner shall constitute a violation of a material term of the contract".
 - 1) The contractor shall structure his/her operations for the performance of the contract to attempt to achieve the MBE goals as stated in the solicitation document.
 - 2) The contractor agrees to use his/her best efforts to carry out these requirements consistent with the efficient and effective performance of the contract.
 - 3) The contractor must ensure that all certified MBEs shall have the maximum practical opportunity to compete for additional subcontract work under the contract, even after the award of the contract.
 - 4) The contractor shall submit monthly to the MBE Liaison or the school system's designated representative a report listing any unpaid invoices, over 30 days old, received from any certified MBE subcontractor, the amount of each invoice and the reason payment has not been made.
 - 5) The contractor shall included in its agreements with its certified MBE sub-contractors, a requirement that those sub-contractors submit monthly to the MBE Liaison or appropriate representative a report that identifies the prime contract and lists all payments received from the contractor in the preceding 30 days, as well as any outstanding invoices, and the amount of those invoices.
 - 6) The contractor shall cooperate in any reviews of the contractor's procedures and practices with respect to minority business enterprises, which the MBE Liaison, the Public-School Construction Program, and/or the Governor's Office of Minority Affairs may, from time to time, conduct.
 - 7) The contractor shall maintain such records as are necessary to confirm compliance with its MBE participation obligations. These records must indicate the identity of certified minority and non-minority sub-contractors employed on the contract, the type of work performed by each, and the actual dollar value of work performed. Subcontract agreements documenting the work performed by all MBE participants must be retained by the contractor and furnished to the MBE Liaison and or appropriate representative on request.

- 8) All records concerning MBE participation must be retained by the contractor for a period of five years after final completion of the contract, and will be available for inspection by the MBE Liaison, representatives from the Public School Construction Program and/or other designated official entities.
- 9) At the option of the MBE Liaison or appropriate agency representative, upon completion of the contract and before final payment and/or release of retainage, the contractor shall submit a final report in affidavit form and under penalty of perjury, of all payments made to, or withheld from MBE sub-contractors.
- 10) If at any time after submission of a bid or proposal and before execution of a contract, the apparent successful bidder or offeror determines that a certified MBE listed on Attachment B - MBE Participation Schedule has become or will become unavailable, then the apparent successful bidder or offeror shall immediately notify the procurement officer and provide such officer with a reason(s) why the change has occurred. Any desired change in Attachment B - MBE Participation Schedule shall be approved in advance by the procurement officer and shall indicate the contractor's efforts to substitute another certified MBE subcontractor to perform the work. Desired changes occurring after the date of contract execution may occur only upon written approval by the LEA.
- 11) A business that presents itself as a minority business may participate in a project but the contract value may not be counted toward the MBE goal or sub goals, if applicable, until the business is certified by MDOT. If it is not certified at the time of contract award it may not be counted toward the goal or sub goals, if applicable, at that time. Only the funds paid after MDOT certification can be counted toward meeting the MBE goal or sub goals, if applicable. If a certified MBE fails to meet the standards specified in State Finance and Procurement Article.14-301, Annotated Code of Maryland, the payments made to the MBE can be recorded and counted under a contract entered into when the MBE was eligible and certified. Ineligibility of an MBE to participate in the MBE program may not be the sole cause of the termination of the MBE contractual relationship for the remainder of the term of the contract.
- 12) Contractors are encouraged to seek additional MBE participation in their contracts during the life of the project. Any additional MBE participation from certified MBEs should be reported to the MBE liaison and should be included in subsequent monthly requisitions for payment.
- 13) The contractor shall complete the Standard Monthly Contractor's Requisition for Payment (IAC/PSCP Form 306.4), specifically page 3 of 16, *Minority Business Enterprise Participation*, with each requisition submitted for payment. This submittal should accurately reflect the payments to be made that month to MBEs, and the cumulative total for the period specified. Any and all MBE firms that are identified on Attachment B – MBE Participation Schedule should be included on page 3 of the first and all subsequent requisitions for payment. Any MBEs identified during the life of the project should be added as soon as the contractor engages them.
- 14) At the completion of the project the contractor shall prepare a written summary of the final certified MBE participation in the contract as compared to the proposed participation at the time of contract award. This should include the name of each certified MBE, the amount that was anticipated to be paid at the time of contract award, the amount actually paid, and an explanation of any differences that have occurred. Special attention should be given to any situations where the final payments to any MBE was below the level of commitment at the time of contract award.

6. Projects Utilizing a Construction Manager Delivery Method

This section of the procedure has been prepared based upon the utilization of Construction Manager Agency method of delivery. If another alternative method of project delivery is being considered, then these procedures would need to be adapted in consultation with the PSCP before proceeding.

- a. For projects that are being designed and solicited utilizing a Construction Manager Agency delivery method with multiple prime contracts, the school system can structure its procedures to attain the overall MBE goal and sub goals, if applicable, for the project as presented below:
- b. The MBE liaison and other school system staff should work with the project's construction manager, cost estimator, and architect, along with any other individuals who could provide assistance, to determine the overall MBE utilization strategy for the work required, appropriate bid packages, and an appropriate overall MBE goal and sub goals, if applicable, for each specific bid or proposal package.
- c. The overall MBE goal and sub goals, if applicable, for the project shall represent the aggregate of the individual goals and sub goals, if applicable, set for each bid or proposal package.
- d. In setting the specific goals and sub goals, if applicable, for each solicitation package consideration should be given to the potential for MBE participation to the maximum extent possible. The information

and procedures provided in section 4.0 MBE Goal Setting Procedures should be consulted and followed for these types of projects.

- e. Prior to submitting the construction documents for State review and authorization to solicit bids or proposals, the school system's representative will prepare a complete list of the individual solicitation packages and indicate the MBE goal and sub goals, if applicable, for each solicitation package. This would include the overall MBE goal and sub goals, if applicable, established in the solicitation documents, the estimated cost for each solicitation package, and the estimated MBE dollar amounts for each solicitation package. A copy of this list should be submitted with the construction documents. The list should be retained as a record by the school system for comparison to the actual contracts awarded with MBE participation, and the final actual MBE participation at the completion of the project.
 - f. Contractors submitting bids or proposals for solicitation packages that do not include a MBE goal and sub goals, if applicable, would not be required to submit any of the MBE attachments that are otherwise required nor would they be required to indicate that they are requesting a waiver. The school system representative would, however, request information from the contractor at the completion of the project to determine if any certified MBE firms had participated in the contract.
 - g. All other submittals of MBE materials and reporting requirements are applicable for the project, including the submittal of attachments a and b as described above in section 6.0. this includes the documentation for a request for a waiver, if applicable and appropriate.
7. Projects Utilizing an Indefinite Delivery/Indefinite Quantity (IDIQ) or Job Order Contracting (JOC) Method of Delivery
- a. The solicitation should be prepared and the overall MBE goal and sub goals, if applicable, established based upon the type of work that is anticipated to be specified or performed under the contract and the availability of certified MBEs. This could include an analysis of the percentages of the different types of work, the estimated dollar value in the entire contract, and the availability of MBEs.
 - b. If an overall goal and sub goals, if applicable, are set the bidders or offerors would be required to submit Attachment A - Certified Minority Business Enterprise Utilization and Fair Solicitation Affidavit in which they could indicate their anticipated MBE participation based upon the entire contract amount and the types of work specified. The award of contract can be made based upon their estimate of MBE participation since there is no specific task order or description of work to be performed and sub-contractors have not been identified or engaged through any type of commitment or subcontract.
 - c. Since MBE participation is only anticipated in a general sense as an objective and specific contract to MBEs have not been signed, then the contract award would not be included in any reporting to the PSCP or subsequent reporting to GOMA.
 - d. However, as the contract proceeds and individual task orders and/or purchase orders are issued, the contractor should submit Attachment B - MBE Participation Schedule for any and all projects or work where MBE sub-contractors and/or suppliers might reasonably be utilized. Discussions between the contractor or offeror and the LEA as the task orders and/or purchase orders are being developed should address this aspect of the contract requirements.
 - e. Any MBE participation should be recorded by the MBE liaison and reported to the PSCP MBE Liaison as the task orders and/or purchase orders are approved.
 - f. The contractor shall complete the Standard Monthly Contractor's Requisition for Payment (IAC/PSCP FORM 306.4), specifically page 3 of 16, *Minority Business Enterprise Participation*, with each requisition submitted for payment. This submittal should accurately reflect the payments to be made that month to MBE S, and the cumulative total for the period specified. Any and all MBE firms that are identified on Attachment B - MBE Participation Schedule should be included on page 3 of the first and all subsequent requisitions for payment. Any MBEs identified during the life of the project should be added as soon as the contractor engages them.
 - g. At the completion of the contract period or the full utilization of the contract's value a report should be prepared by the LEA MBE Liaison and submitted to the PSCP MBE Liaison summarizing the MBE participation in each and all of the task orders or purchase orders issued under the contract. This should include the anticipated MBE participation prior to the issuance of the solicitation, the MBE participation anticipated at the time of contract award and the actual MBE participation at the completion of the contract.
8. Projects Utilizing the Design/Build Delivery Method
- a. The solicitation is for both A/E services and the actual construction of a public school project. The solicitation should be prepared and the MBE goal and sub goals, if applicable, established for the

construction work that is anticipated for the project. The goal setting procedures described in Section 4.0 above should be utilized for these types of projects.

- b. The bidders or offerors should be required to submit Attachment A - Certified Minority Business Enterprise Utilization and Fair Solicitation Affidavit on which they would indicate their anticipated MBE participation based upon the construction work anticipated and their understanding of the MBE goal and sub goals, if applicable, the types of work involved, and the availability of certified MBEs for the project. Since there are no detailed plans or designs for the project and there are no contracts or subcontracts for the actual construction work there is no need to submit any other MBE attachments, at this time.
- c. If the bidder or offeror, who is to be awarded this contract has indicated that they do not anticipate achieving the overall MBE participation goal and sub goals, if applicable, for this project on Attachment A, then they are in effect requesting a waiver. They will be required to submit documentation at a later date to justify this request.
- d. As the project proceeds through the design phase and the project is nearing the completion of the construction documents for submission to the State to review, the Design/Build Team (team) in consultation with LEA representatives should discuss the opportunities and potential for certified MBEs to participate in the project.
- e. The team should begin to identify potential contractors and sub-contractors, opportunities to segment the project, and MBEs that could participate in the project.
- f. At a point in time that is approximately 30 days prior to the anticipated CD submission to the State, the team should complete and submit Attachment B - MBE Participation Schedule to the LEA for their review and approval.
- g. If the team had indicated on Attachment A that they would meet the goals and the information on Attachment B indicates that they did meet the goals then the team should proceed with the construction of the project.
- h. If the team had indicated on Attachment A that they did not anticipate meeting the overall MBE goal and sub goals, if applicable, or only a portion of the goal and sub goals, if applicable, then Attachment B should be reviewed by the LEA. The team should, at this time, submit their documentation in support of the waiver requested.
- i. The proposed MBE participation should be reviewed and a determination made as to whether the team has made a good faith effort to meet the MBE goals and sub goals, if applicable, established for the project and as stated on Attachment A, previously submitted.
- j. If a request for a waiver is made and approved, Attachment F – MBE Waiver Documentation should be signed by a school system representative and submitted to the PSCP and the Governor’s Office of Minority Affairs.
- k. Since there was no MBE participation reported at the time of the award of the Design/Build contract, the LEA would submit the entire package of information, including all of the MBE related attachments to the PSCP within ten (10) days of the team being directed to proceed with the actual construction work.
- l. All other submittals of MBE materials and reporting requirements are applicable for the project, as described above in Section 6.0.

7.0 RECORDS AND REPORTS

1. The MBE Liaison shall maintain such records as are necessary to confirm compliance with its Minority Business Enterprise Procedures and activities. The records shall be maintained until the project is audited by the Public School Construction Program. These records shall include by project:
 - a. The contractor report submitted at the completion of the project;
 - b. The identity of the minority contractors employed on the project;
 - c. The type of work performed;
 - d. The actual dollar value of the work, services, supplies or equipment; and
 - e. The MBE percentage of the total contract.
2. The MBE Liaison will maintain a record of all waivers approved for each project or solicitation package where the prime contractor was unable to achieve the established overall goal or sub goals, if applicable. The MBE Liaison will, however, report to the PSCP all MBE participation by MDOT certified firms who are prime contractors, sub-contractors, suppliers, or otherwise making an economically viable contribution to each project. This information shall be reported to PSCP within ten (10) days after approval of the award of the contract by the board of education.

3. The LEA shall submit the “Certified Minority Business Enterprise Participation Standard Monthly Contractor’s Requisition for Payment” (IAC/PSCP Form 306.4 page 3 of 16, located in the Administrative Procedures Guide), which is Attachment G in this procedure, to the PSCP Director of Fiscal Services as part of the regular monthly request for payment for the project.
4. The LEA shall submit the “Close-Out Cost Summary” (IAC/PSCP Form 306.6 located in the Administrative Procedures Guide), which is Attachment H of this procedure, along with the “Certified Minority Business Enterprise Participation Standard Monthly Contractor’s Requisition for Payment” (IAC/PSCP Form 306.4) to the PSCP Director of Fiscal Services within 180 days of completion of the project.
5. Each fiscal year end, PSCP Fiscal Services will create a report “Payments Made To contractors during The Fiscal Year” and maintain such records as are necessary to confirm compliance with its minority business enterprise procedures and activities.
6. Each fiscal year end, PSCP Fiscal Services will create a report “Projects Completed During the Fiscal Year” and maintain such records as are necessary to confirm compliance with its Minority Business Enterprise Procedures and activities. This report will compare the overall MBE goal and sub goals, if applicable, for each specific project with the MBE participation anticipated at the time of contract award and the actual MBE participation at the completion of the project.

8.0 MONITORING

1. The LEA’s procurement personnel or project staff shall verify that the certified MBE’s listed in the MBE participation schedule are actually performing the work.
2. The LEA’s procurement personnel shall ensure that MBE sub-contractors are receiving compensation as set forth in the MBE participation schedule by ensuring that the contractor submits monthly reports, listing any unpaid invoices over 30 days old received from any certified MBE subcontractor, the amount of each invoice, and the reason payment has not been made.
3. The MBE Liaison and/or the Public-School Construction Program will conduct reviews as deemed necessary to confirm compliance with the minority business enterprise participation requirements.
4. The MBE Liaison will maintain appropriate records, and shall assist the Public-School Construction Program in on-site or post-audit reviews upon request.
5. Auditors from the Public-School Construction Program will have access to and the ability to audit MBE participation for specific projects, information retained by the LEA, and/or submitted to the IAC in reports/forms filed by the LEA as referenced above.

9.0 MINORITY BUSINESS ENTERPRISE LIAISON

1. The Superintendent shall designate an individual to be identified as the MBE Liaison for the school system.
2. The MBE Liaison will be the contact person who will work with the Public-School Construction Program and the Governor’s Office of Minority Affairs to implement the Minority Business Enterprise Program for the school system and the State of Maryland.
3. The Superintendent will immediately notify the Public-School Construction Program if there is a change in the MBE Liaison for the school system.

ATTACHMENT A

CERTIFIED MINORITY BUSINESS ENTERPRISE
UTILIZATION AND FAIR SOLICITATION AFFIDAVIT

NOTE: You must include this document with your bid or offer. If you do not submit the form with your bid or offer, the procurement officer shall deem your bid non-responsive or your offer not reasonably susceptible of being selected for award.

* * * * *

Part I.

I acknowledge the:

- Overall certified MBE subcontract participation goal of 0%. and
- The subgoals, if applicable, of:
- N/A% for certified African American-owned businesses and
- N/A% for certified women-owned businesses.

I have made a good-faith effort to achieve this goal. If awarded the contract, I will continue to attempt to increase MBE participation during the project.

Part II.

Check ONE Box

NOTE: FAILURE TO CHECK ONE OF BOXES 1, 2, or 3 BELOW WILL RENDER A BID NON-RESPONSIVE OR AN OFFER NOT REASONABLY SUSCEPTIBLE OF BEING SELECTED FOR AWARD

NOTE: INCONSISTENCY BETWEEN THE ASSERTIONS ON THIS FORM AND THE INFORMATION PROVIDED ON THE *MBE PARTICIPATION SCHEDULE* (ATTACHMENT B) MAY RENDER A BID NON-RESPONSIVE OR AN OFFER NOT REASONABLY SUSCEPTIBLE OF BEING SELECTED FOR AWARD

1 I have met the overall MBE goal and MBE subgoals for this project. I submit with this Affidavit [Attachment A] the *MBE Participation Schedule* [Attachment B], which details how I will reach that goal.

or

2 After having made a good-faith effort to achieve the overall MBE goal and MBE subgoals for this project, I can achieve partial success only. I submit with this Affidavit [Attachment A] the *MBE Participation Schedule* [Attachment B], which details the MBE participation I have achieved.

I request a partial waiver as follows:

- Waiver of overall MBE subcontract participation goal: 0%
- Waiver of MBE subcontract participation subgoals, if applicable:
- ____ % for certified African American-owned businesses and
- ____ % for certified women-owned businesses.

Within 10 days of being informed that I am the apparent awardee, I will submit *MBE Waiver Documentation* [Attachment F] (with supporting documentation).

or

- 3 After having made a good faith effort to achieve the overall MBE goal and MBE subgoals for this project, I am unable to achieve any portion of the goal or subgoals. I submit with this Affidavit [Attachment A] the *MBE Participation Schedule* [Attachment B].

I request a full waiver.

Within 10 days of being informed that I am the apparent awardee, I will submit *MBE Waiver Documentation* [Attachment F] (with supporting documentation).

Part III.

I understand that if I am the apparent awardee or conditional awardee, I must submit **within 10 working days** after receiving notice of the potential award or within 10 days after the date of conditional award – whichever is earlier – the:

- *Outreach Efforts Compliance Statement* (Attachment C)
- *Subcontractor Project Participation Statement* (Attachment D)
- *Minority Sub-contractors Unavailability Certificate* (Attachment E) (if applicable)
- Any other documentation the Procurement Officer requires to ascertain my responsibility in connection with the MBE participation goal and subgoals

I acknowledge that if I fail to timely return complete documents, the Procurement Officer may determine that I am not responsible and therefore not eligible for contract award. If the contract has been awarded, the award is voidable.

I acknowledge that the MBE sub-contractors/suppliers listed in the *MBE Participation Schedule* and any additional MBE subcontractor/suppliers identified in the *Subcontractor Project Participation Statement* will be used to accomplish the percentage of MBE participation that I intend to achieve.

In the solicitation of subcontract quotations or offers, MBE sub-contractors were provided the same information and amount of time to respond as were non-MBE sub-contractors.

The solicitation process was conducted in such a manner so as to not place MBE sub-contractors at a competitive disadvantage to non-MBE sub-contractors.

I solemnly affirm under the penalties of perjury that this Affidavit is true to the best of my knowledge, information, and belief.

Bidder/Offeror Name

Affiant Signature

Address

Printed Name & Title

Address (continued)

Date

Attachment B

1. Prime Contractor's Name		2. LEA and PSC No.		
3. Project/School Name		4. Project/School Location		
5. Prime Contractor's Address/Telephone Number/Email		6. Base Bid Amount \$ _____		
		Acceptance Alternates \$ _____		
		Total \$ _____		
7a. Minority Firm Name: _____		Telephone Number: _____		
Minority Firm Address: _____		NAICS Code: _____		
MDOT Firm Certification Number: _____				
<input type="checkbox"/> African American <input type="checkbox"/> Asian American <input type="checkbox"/> Native American <input type="checkbox"/> Women <input type="checkbox"/> Hispanic <input type="checkbox"/> Disabled				
<i>Subcontractor Firm (Select One)</i>	<i>Allowable Percentage</i>	<i>Percentage of Total Contract</i>	<i>Subcontractor Dollar Amount</i>	<i>Participation Amount</i>
<i>MDOT Certified Firm</i>	100%		\$	\$
<i>MDOT Certified Prime Contractor</i>	50% of established goal OR		\$	\$
	100% of one subgroup contract subgoal			
<i>MDOT Certified Supplier, Wholesaler and Regular Dealer</i>	60%		\$	\$
7b. Minority Firm Name: _____				
Minority Firm Address: _____				
MDOT Firm Certification Number: _____				
<input type="checkbox"/> African American <input type="checkbox"/> Asian American <input type="checkbox"/> Native American <input type="checkbox"/> Women <input type="checkbox"/> Hispanic <input type="checkbox"/> Disabled				
<i>Subcontractor Firm (Select One)</i>	<i>Allowable Percentage</i>	<i>Percentage of Total Contract</i>	<i>Subcontractor Dollar Amount</i>	<i>Participation Amount</i>
<i>MDOT Certified Firm</i>	100%		\$	\$
<i>MDOT Certified Prime Contractor</i>	50% of established goal OR		\$	\$
	100% of one subgroup contract subgoal			
<i>MDOT Certified Supplier, Wholesaler and Regular Dealer</i>	60%		\$	\$
7c. Minority Firm Name: _____				
Minority Firm Address: _____				
MDOT Firm Certification Number: _____				
<input type="checkbox"/> African American <input type="checkbox"/> Asian American <input type="checkbox"/> Native American <input type="checkbox"/> Women <input type="checkbox"/> Hispanic <input type="checkbox"/> Disabled				
<i>Subcontractor Firm (Select One)</i>	<i>Allowable Percentage</i>	<i>Percentage of Total Contract</i>	<i>Subcontractor Dollar Amount</i>	<i>Participation Amount</i>
<i>MDOT Certified Firm</i>	100%		\$	\$
<i>MDOT Certified Prime Contractor</i>	50% of established goal OR		\$	\$
	100% of one subgroup contract subgoal			
<i>MDOT Certified Supplier, Wholesaler and Regular Dealer</i>	60%		\$	\$
8. MBE Total Participation Amount			9. Total MBE Percent of Entire Contract	
10. Form Prepared by:			11. Reviewed and Accepted by Board of Edu. MBE Liaison	
Name: _____			Name: _____	
Title: _____			Title: _____	
Date: _____			Date: _____	

Total MBE Participation:	\$ _____	_____%
Total African-American Participation:	\$ _____	_____%
Total Women-Owned MBE Participation:	\$ _____	_____%
Total Other Participation:	\$ _____	_____%

October 1, 2017

Attachment C Outreach Efforts Compliance Statement

****Complete and submit this form within 10 business days of notification of apparent award ****

In conjunction with the bid or offer submitted in response to the solicitation for <<*project name*>> / <<*Solicitation No.*>>, I affirm the following:

1. Bidder/Offeror identified opportunities to subcontract in these specific work categories (extend list as needed):
 - a. _____
 - b. _____
 - c. _____
 - d. _____
 - e. _____
 - f. _____

2. Attached to this form are copies of written solicitations (with bidding instructions) used to solicit certified MBEs for these subcontract opportunities.

3. Bidder/Offeror made the following attempts to contact personally the solicited certified MBEs (extend list as needed):
 - a. _____
 - b. _____
 - c. _____

4. Select ONE of the following:
 - a. This contract does not involve bonding requirements.

OR

 - b. Bidder/Offeror assisted certified MBEs to fulfill or seek waiver of bonding requirements (*describe efforts*).

5. Select ONE of the following:
 - a. Bidder/Offeror did/did not attend the pre-bid/proposal conference.

OR

 - b. No pre-bid/proposal conference was held.

_____ By: _____
Bidder/Offeror Printed Name

Signature: _____

Title: _____

Date: _____

Address: _____

Attachment D

MINORITY BUSINESS ENTERPRISES SUBCONTRACTOR PROJECT PARTICIPATION STATEMENT

PROJECT/ SCHOOL NAME: _____
PROJECT/ SCHOOL LOCATION: _____
LEA: _____
NAME OF PRIME CONTRACTOR: _____
NAME OF MBE SUBCONTRACTOR: _____

MDOT Certification Number _____ **NAICS Code** _____

1. Work/Services to be performed by MBE Subcontractor: _____

2. Subcontract Amount: \$ _____ **Participation Amount** \$ _____

3. Bonds - Amount and type required of Subcontractor if any: _____

4. MBE Anticipated or Actual Commencement Date: _____ **Completion Date:** _____

5. This MBE subcontract represents the following percentage of the total contract cost: _____

6. This is an African American Firm: Yes _____ No _____

7. This is a Women Owned Business Firm: Yes _____ No _____

8. This is a Native American, Hispanic or Disabled Firm: Yes _____ No _____

(Circle One)

The undersigned subcontractor and prime contractor will enter into a contract for the work/service indicated above upon the prime contractor's execution of a contract for the above referenced project with the _____ Board of Education. The undersigned subcontractor is a MDOT certified Minority Business Enterprise. The terms and conditions stated above are consistent with our agreements.

Signature of Subcontractor: _____

Date: _____

The term and conditions stated above are consistent with our agreements.

Signature of Prime Contractor: _____

Date: _____

Attachment E

MINORITY SUBCONTRACTOR UNAVAILABILITY CERTIFICATE

1. It is hereby certified that the firm of _____
located at _____
_____ (Name of Minority firm)
_____ (Number) _____ (Street)
_____ (City) _____ (State) _____ (Zip)

was offered an opportunity to bid on the _____ school project
in _____ County by _____
_____ (Name of Prime Contractor's Firm)

2. The _____ (Minority Firm), is either unavailable for the work/service or
unable to prepare a bid for this project for the following reason(s):

Signature of Minority Firm's MBE Representative Title Date

MDOT Certification # Telephone #



3. To be completed by the prime contractor if Section 2 of this form is not completed by the minority firm.

To the best of my knowledge and belief, said Certified Minority Business Enterprise is either unavailable for the work/service for this project, is unable to prepare a bid, or did not respond to a request for a price proposal and has not completed the above portion of this submittal.

Signature of Prime Contractor Title Date

Attachment F

MBE WAIVER DOCUMENTATION

Project Name: _____ PSC. No. _____

Base Contract Amount \$ _____

Plus Accepted Alternates _____

Equals Total Contract Amount \$ _____

I have previously requested that a waiver be granted to the overall MBE goal for this project of ____ percent, with a minimum of ____ percent from certified African American-owned businesses, a minimum of ____ percent from certified Asian American-owned businesses, and the balance from all certified minority business enterprises, if applicable. This would include the total dollar value of all materials, supplies, equipment, and services, including construction services directly or indirectly, from Minority Business Enterprises (MBE) which are currently certified by the Maryland Department of Transportation (MDOT).

I _____, hereby certify that my position is
(Name of Company Representative)

_____, and I am the duly authorized representative of
(Position Title)

(Company Name)

I further certify that I have submitted a *Schedule for Participation of Certified Minority Business Enterprises* which reflects the percentage and dollar value of certified Minority Business Enterprise participation which my company expects to achieve for this contract. Therefore, the request for the waiver is as follows:

Summary MBE Participation Schedule from Attachment B

Minority Group	MBE GOAL		Actual MBE Participation		Request For Waiver	
	Dollar Value of Total Contract	Percent of Total Contract*	Dollar Value	Percent of Total Contract	Dollar Value	Percent of Total Contract
a. Sub Goal African American						
b. Sub Goal Women-owned						
c. Other * in Sub Goal group a/b above						
TOTALS						

* with accepted/rejected alternates
June 2011

To support this request for a waiver, I include the following information as attachments which I certify to be true to the best of my knowledge.

1. A detailed statement of the efforts made by the contractor to identify and select portions of the work proposed to be performed by sub-contractors in order to increase the likelihood of achieving the stated goal;
11. A detailed statement of the efforts made by the contractor *prior to and up to 10 days before the bid opening* to solicit minority business enterprises through written notices that describe the categories of work for which subcontracting is being solicited, the type of work to be performed, and specific instructions on how to submit a bid;
12. A detailed statement of the contractor's efforts to make personal contact with MBE firms identified for Item 2. above;
13. A record of the name, address, telephone number, and dates contacted for each MBE identified under items 2. and 3. above;
14. A description of the information provided to MBE's regarding the plans, specifications and the anticipated time schedule for portions of the work to be performed;
15. Information on activities to assist minority business enterprises to fulfill bonding requirements, or to obtain a waiver of these requirements;
16. Information on activities to publicize contracting opportunities to minority business enterprises, attendance at pre-bid meetings, or other meetings scheduled by the MBE Liaison or designated representative;
17. As to each MBE that placed a subcontract quotation or offer which the apparent low bidder or successful offeror considers not to be acceptable, a detailed statement of reasons for this conclusion; and
18. A list of minority sub-contractors found to be unavailable. This shall be accompanied by a *Minority Subcontractor Unavailability Certificate* signed by the minority business enterprise or from the apparent low bidder or successful offeror indicating that the minority business did not provide the written certification.

Signature _____ **Date** _____
 (Company Representative Name)

Sworn and subscribed before me this _____ **day.**

of _____ **in the year** _____ **Notary Public** _____

Reviewed and accepted by the _____ **County Board of Education MBE Liaison.**
 (County Name)

Signature _____ **Date** _____
 (County Representative Name)

New 60% Rule

Presented by GOSBA at 11/16/17 SPAG Meeting

Chapter 438, Laws of Maryland 2017 (SB309), Section 2

➤ Effective October 1, 2017

➤ Based on Federal

Disadvantaged Business

Enterprise (DBE) rules regarding
counting supplies

Counting MBE Suppliers – How?

MBE Suppliers Crediting Classifications =

1. MBE Manufacturers
2. Furnish & Install
3. MBE Regular Dealers
4. MBE Brokers (not a manufacturer or regular dealer)

MANUFACTURERS

► If the materials or supplies are obtained from a MBE certified in the appropriate NAICS code(s) to provide products and services as a **manufacturer**, count 100 percent of the cost of the material or supplies toward MBE goals.

FURNISH & INSTALL

➡ If a vendor is a certified MBE supplier, wholesaler, and/or Regular Dealer certified in the proper NAICS code(s) is a manufacturer or wholesale merchant to **furnishes supplies and install materials** necessary for successful Contract completion, count 100 percent of the cost of the material, supplies and labor toward MBE goals.

Regular Dealer

- ▶ A regular dealer is defined in the statute as: a firm that owns, operates, or maintains a store, a warehouse, or other establishment in which the materials, supplies, articles, or equipment are of the general character described by the specifications required under the Contract are bought, kept in stock, or regularly sold or leased to the public in the usual course of business; and
- ▶ Does not include a packager, a broker, a manufacturer's representative, or any other person that arranges or expedites transactions.
- ▶ If the materials or supplies are purchased from an **MBE Regular Dealer**, count 60 percent of the material or supplies toward MBE goals.

Broker

For materials or supplies purchased from a certified MBE that is neither a manufacturer nor a Regular Dealer, but rather a **broker**, count the entire amount of fees or commissions charged for assistance in the procurement of the material and supplies, fees, transportation charges for the delivery of materials and supplies required on a procurement, towards the MBE Contract goals, provided you determine the fees to be reasonable and not excessive as compared with fees customarily allowed for similar services. Do not count any portion of the cost of the materials and supplies themselves toward MBE goals.

Summary

- ↳ Supplies from MBE **manufacturer** = **Count 100%** of cost of materials towards project MBE goal
- ↳ Supplies from MBE manufacturer or Regular Dealer that **furnishes and installs** = **Count 100%** of cost of materials towards project MBE goal
- ↳ Supplies from MBE **Regular Dealer** = **Count 60%** of cost of materials towards project MBE goal
- ↳ Supplies from MBE **broker** = **Count only the fee or commission** the broker charges for the procurement counts towards the project MBE goal if you determine the fee to be reasonable and not excessive as compared with fees customarily allowed for similar services

APPENDIX B

IAC/PSCP FORM 306.2a

**CONTRACTOR'S CERTIFICATION
OF RECEIPT OF PAYMENT**

This form must accompany IAC/PSCP Form
306.2, Request for Reimbursement to LEA, if
Canceled check(s) are not provided.

LEA:

PROJECT TITLE: _____

PSC NO: _____

I hereby certify that payment in the amount of \$ _____, check number _____ dated _____ has been received from _____ Public Schools and deposited to _____ bank) on _____ (date) for capital improvements made to _____ school/project),

Name of Contractor Firm

Authorized Signature

Date

NOTARIZATION

County _____ to wit:

I hereby certify that on this _____ day of _____ in the year of _____ before me, a Notary Public for said County, personally appeared _____ (name), and made oath in due form of law that he/she is _____ (title) of _____ (name of firm), and on behalf of said firm stated that the matters and facts set forth in the foregoing verification are true to the best of his/her knowledge, information and belief. He/she acknowledged that he/she executed the same purposes herein contained and that they had full authority to execute same.

As witness my hand and official seal:

NOTARY PUBLIC

APPENDIX C

STATE PROJECT IDENTIFICATION SIGN

AND INSTRUCTIONS

(2 Pages)

APPENDIX C

CONSTRUCTION SIGN FOR STATE FUNDED
SCHOOL CONSTRUCTION PROJECTS

Larry Hogan, Governor
Boyd Rutherford, Lt. Governor

Building Bright
Futures in Maryland

The State of Maryland and the _____ Board of Education are:
(State Jurisdiction)

_____ the
(Select from Page B-1A)

_____ SCHOOL
(Enter School Name)

Public School Construction Program Architect: _____ Contractor: _____
(Name of Firm) (Name of Company)

The Maryland General Assembly
Michael E. Busch, Speaker of the House
Thomas V. Mike Miller, Jr., President of the Senate

Board of Public Works
Larry Hogan, Governor
Peter Franchot, Comptroller
Nancy K. Kopp, Treasurer

72" 96"

FOR SCHOOL STATE CONSTRUCTION SIGN

The following appropriate language should be entered on the construction sign to describe the work for the specific project (or modified as required):

- Renovating
- Constructing an Addition and Renovating
- Constructing an Addition to
- Constructing a Replacement School for
- Constructing the New
- Constructing a Pre-Kindergarten Addition at
- Renovating the Science Laboratories at
- Replacing the Roof at
- Replacing the Boilers at
- Replacing the Windows at

APPENDIX D

MCPS EMERGENCY/CRISIS PROCEDURES, SHELTER/LOCKDOWN

Emergency Preparedness Procedures

Key Points for Lockdown-Evacuate-Shelter (Les)

Lockdown

This is a term used to describe an emergency at an MCPS facility. Lockdown alerts staff that imminent danger exists inside or outside the building, and requires moving to an immediate lockdown mode. It requires that all students are under supervision. *The on-site emergency team (OSET) is not activated during a Lockdown.*

Persons authorized to call a Lockdown

School administrators or their designee will notify students, staff and visitors via the PA system and the portable radios when a Lockdown is in effect. Directions should be given to immediately move to a lockdown mode. Staff should make the announcement and notify 911 and Office of School Performance.

Lockdown Alert – Staff Guidance

- When the administrator/designee announces a Lockdown, scan the immediate area outside the classroom or office for any students and staff. Allow them in the classroom/office, and immediately lock or secure the door if possible.
- Make the room look *unoccupied* by turning off the lights, close/cover the windows and blinds, and move away from the line of sight from the doors and windows. Remain silent.
- If staff and students are inside the building but outside a classroom or office when a Lockdown is called, move students to the nearest securable location.
- Staff supervising students outside when a Lockdown alert occurs inside the building should be notified of the Lockdown activation by P.A. or two-way radio. Staff and students should move to a pre-determined safe location identified on the emergency plan away from the building and maintain communication with the command post.
- Ignore the fire alarm system and class change bells.
- Wait for further instructions.

Evacuate

There are two evacuation alerts, *Fire and Directed*.

Fire Evacuation

- Activate Fire Evacuation Alarm
- Students/staff/visitors leave the building by the nearest exit
- Proceed to a point at least 50 feet from the building
- Perform an accountability of the students/staff/visitors

Directed Evacuation

- Will be used during possible High Level Bomb threats, an identified Suspicious Package or an Inside Hazardous Material Release
- Notify 911 and OSP
- Determine plan to direct everyone away from the known danger area
- Announce via PA and portable radio
- Students/staff/visitors must evacuate to a point at least 300 feet from the building
-

Shelter

This is a term used to alert staff that an emergency exists at or near an MCPS facility. It requires all students to be accounted for and under supervision. Administrators may activate the OSET and set up a command post when appropriate. There are three types of shelters: *Public Safety, Severe Weather and Outside Hazardous Materials Release.*

Persons authorized to call a Shelter alert

Administrators or their designee will notify students/staff/visitors via the PA system and the portable radios when a Shelter alert is activated. It is recommended that an “age-appropriate” announcement of a Shelter alert include a brief description of the nature and location of the incident.

Public Safety Shelter Alert- Staff Guidance

When the administrator announces a Public Safety Shelter alert:

- Bring outside students/staff/visitors into the main building, portable classrooms are secured but not evacuated
- Outside doors are locked and kept secured
- Students should be accounted for in an instructional area.
- Classroom instruction should continue
- Staff must document attendance and report any discrepancies to an administrator/designee.
- During a Public Safety Shelter alert, classroom lockdown is not required.
- *The OSET* may be activated by an administrator during a Public Safety Shelter alert via a PA announcement and over the portable radios.
- Depending on the situation (the nature of the emergency or potential threat), it may not be appropriate to change classes. In these situations, class bells should be turned off and students/staff should remain in their classrooms until directed otherwise by the administrator/designee.
- Do not ignore the fire alarm system.

Severe Weather Shelter – A severe thunderstorm or tornado warning is activated for the area near the school.

- Students/staff/visitors must report to identified weather safe areas inside the building.
- Portable classrooms are to be evacuated to the main building.
- Bring emergency kit/phone with Nextel phone and ensure the NOAA weather radio is continually monitored

Outside Hazardous Material Release Shelter Alert

is a term used to describe a specific shelter alert due to an outside air contamination emergency at or near the building. This could be the result of a suspected chemical, biological, or radiological incident; or a nearby hazardous materials spill.

Outside Hazardous Material Release Alert-Staff Guidance

When activating an Outside Hazardous Material Release Shelter alert, take the following steps immediately:

- Announce a *Outside Hazardous Material Release Shelter Alert*
- Bring students/staff/visitors into the main building from outdoor activities
- Evacuate portable classrooms in consultation if safe to do so
- Secure/lock exterior doors and windows
- Hold students in their current locations inside the building until the best course of action can be determined
- Turn off electrical power to ensure immediate shutdown of HVAC
- Ignore fire alarm system—only in this Outside Hazardous Material Release Shelter alert.

Parent/Child Reunification

All schools have plans in place to reunite students with their parents/guardians in the event of an emergency at a school. This process will ensure the safe and orderly reuniting of students and parents/guardians. Schools will ensure they use a three-step approach.

- Identify parents (using ID)
- Identify student location in the school or PCR location, sign out student
- Unite student and parent/guardian

Firearms

- Avoid attempts to disarm/subdue an armed subject.
- Notify administrator/designee and school-based security of any firearm incidents immediately, and call 911 with details.
- Determine need to implement a Lockdown or Public Safety Shelter alert.
- Abandoned/discarded firearms should be covered by appropriate means and never left unattended.

Bomb Threat Assessment

- Factors to consider:
 - Details/specifics provided by the bomb caller
 - Number of prior threats to the school
 - Current events surrounding the school
 - Demeanor of the bomb caller
- Based on an assessment of the situation and input from the administration of the school, the Department of School Safety and Security and the police, the administrator will make a decision on evacuation. If the parties do not agree, this disagreement will be resolved in favor of evacuation. (Refer to MCPS Regulation EKC-RA.) Use a Directed Evacuation to evacuate the school
- Evacuation is warranted **only** if the threat level is high.
- Evacuation **is** not warranted if the threat level is low.
- It is recommended that an activation of a Public Safety Shelter alert and the use of sweep/scan teams be used during a low level threat when the building is not evacuated.

Bomb Threats Call Trace

- Use “call trace” procedures on the yellow *Telephone Bomb Threat Checklist* card. Follow instructions exactly.
- After hanging up the phone, press *57 on the same line the call came in on.
- Press *47 if you have 279 or 517 exchanges on your school phone number.
- Do not dial “9” before you dial *57 or *47.
- Notify school administration immediately
- Report the bomb threat to 911 and OSP.
- Inform the 911 operator of “call trace” activation.

Bomb Threat Sweep/Scan

- In certain circumstances, staff volunteers may be asked to sweep/scan the facility or grounds for any suspicious

items.

- A sweep/scan should be conducted in teams and only by visual means (eyes and ears only).
- If a suspicious item is discovered during a sweep/scan, evacuate to a 300-foot safe zone and notify administrator immediately.
- If a suspicious item is located, do not use a radio or cell phone in the immediate area within 25 feet in all directions.
- No suspicious item should be handled in any manner by school staff (do not touch it!).

Hazardous Material Spills

These guidelines should be followed in the event of a chemical incident in which there is potential for a significant release of hazardous materials. Spill response procedures will vary depending on whether the spill is **small** (less than 18 inches in diameter), **medium** (exceeds 18 inches, but is less than 6 feet), or **large** (exceeds 6 feet in diameter, and any “running” spill that has not been stopped). If a potential biological agent threat or incident is present, follow MCPS Biological Agent Threats/Incidents guidelines.

General Spill Control Techniques: Once a spill has occurred, the staff at the spill site must decide whether the spill is small enough to handle without outside assistance. Guidance should be obtained from science resource teachers or staff with a chemistry background. (i.e., in science labs, chemistry labs, automotive shop areas). *Only staff who are properly trained under OSHA Regulation 1910.120 should attempt to contain or clean up a small spill.*

Small Spill Evacuation: Evacuate the immediate area and surrounding areas whenever the air is or could become untenable (i.e., experiencing difficulty breathing, watery eyes, upper respiratory congestion or tightness in chest, coughing, runny nose, etc.). Also evacuate the immediate area or building if material is emitting vapors or fumes.

If a medium or large hazardous chemical/material spill occurs inside your school building—

- An administrator/designee should call 911 and OSP immediately with detailed information (obtain the chemical MSDS, if available at time of spill incident).
- Evacuate the building immediately using a **Directed Evacuation** to funnel students/staff away from danger area.
- Notify building security and building services staff.
- Secure the area around the spill area.
- Follow instructions from fire and rescue services personnel.

If a medium or large hazardous chemical/material spills occurs immediately outside your school building—

- An administrator/designee should call 911 and OSP immediately with detailed information.
- Shut windows and doors and turn off ventilation systems.
- Notify building security and building services staff.
- Turn class-change bells off, if appropriate.
- Follow instructions from fire and rescue services personnel.
- Activate the Outside Hazardous Material Release alert, if appropriate.

APPENDIX E

**Montgomery County Public Schools
Division of Design and Construction**

CHANGE ORDER FORM # _____

Facility: _____ Projects Name: _____

Contractor: _____ Date: _____

Change to original scope of work Additional work

General description of work to be performed:

Attach detailed proposal with change order	FOR THE TOTAL SUM OF: \$

Changes to the Contract:

The original contract sum was:	\$
Total amount of this change order	\$
Total original contract amount plus or minus previous approved change orders:	\$
Total contract amount including this change order	\$

Completion Date: _____ Work Order #: _____

Notice: Acceptance of this change order does not alter the contract completion date. If this change order has any effect on the contract completion date, additional documentation shall be submitted to MCPS as specified.

(MCPS) Representative Approval (Date)

(MCPS Contract Supervisor Approval) (Date)

(Authorized Contractor Representative Acceptance) Title (Date)

APPENDIX F

**Montgomery County Public Schools
Division of Design and Construction**

OVERTIME REIMBURSEMENT AGREEMENT

Facility: _____

Contractor: _____

Description of work to be performed: _____

Date: _____ Hours Required: _____

Date: _____ Hours Required: _____

Date: _____ Hours Required: _____

Date: _____ Hours Required: _____

Date: _____ Hours Required: _____

Date: _____ Hours Required: _____

Date: _____ Hours Required: _____

Notice: The Contractor agrees to pay all overtime costs for building service personnel as required to perform work at a premium rate. These costs will be deducted from the contractors final invoice.

(Authorized Contractor Representative Approval) (Date)

(MCPS Contract Supervisor Approval) (Date)

(MCPS Representative Approval) (Date)

APPENDIX G

ASBESTOS FREE MATERIAL VERIFICATION FORM

PRODUCT TYPE: _____

MANUFACTURERS: _____

MODEL NUMBER TESTED: _____

SUPPLIER: _____

LOT/PRODUCTION NUMBER TESTED: _____

The undersigned Contractor certifies that the building materials identified above have been tested in accordance with the bid documents and the EPA requirements. The EPA accredited **laboratory analysis report is attached** that confirms these materials do not contain asbestos.

The laboratory performing the analysis must have received U.S. Environmental Protections Agency (EPA) accreditation and be a member of the National Voluntary Laboratory Accreditation Program (NVLAP). No other form of confirmation such as Material Safety Data Sheets, manufacturer documentation, historical testing, etc. will be accepted. A list of EPA accredited laboratories can be found at <http://ts.nist.gov/standards/scopes/programs.htm>

The Contractor or the manufacturer can have the laboratory testing performed. The cost for testing shall be included in the bid prices offered.

Below is a list of materials of concern that require laboratory analysis.

- Acoustical ceiling tile, wall, etc.)
- Adhesives
- Caulking
- Fire Rated Doors
- Fire Board
- Floor tile and sheet flooring,
- Folding Doors
- Gypsum Panels (Drywall)
- Insulation (All types; roof, HVAC, piping
- Mastics
- Plaster
- Roofing System Components e.g. BUR Asphalt, Felts, Cap Sheets, Shingles, etc.
- Spackle
- Toilet Partitions
- Window Glazing

Contractor

Contractor Representative

Invitation to Bid #

Date

APPENDIX H

DOOR/WINDOW REPLACEMENTS QUOTATION FORM

COMPANY NAME: _____

Bidder shall supply one manufacture and price per line item and must complete ALL line items. Bidder shall supply all required information for each line item. **DO NOT ALTER THE QUOTATION FORM IN ANY WAY! BIDDER SHALL SUPPLY WITH THEIR BID MANUFACTURERS' LITERATURE FOR PRODUCTS IDENTIFIED.** Failure to comply with the above shall be considered non-responsive and disqualify your bid. Prices below are to be all-inclusive, including materials, labor, all removal/disposal cost, and any equipment required to allow bidder to complete their work in all detail.

RATES: Regular rate cost will represent work performed Monday through Friday, 6:00AM until 5:59 PM. Overtime rate will represent work performed Monday through Friday 6:00 PM until 5:59 AM, including weekends and all MCPS Holidays.

Calculate the **total cost column** for each line item by multiplying the quantity by the regular rate. *The basis of award will be the total cost as requested under Item #25 and taking into consideration the unit cost provided for overtime price.*

					<i>ALL INCLUSIVE COST INCLUDING ALL MATERIALS, EQUIPMENT LABOR AND ACCESSORIES</i>		
ITEM #	DESCRIPTION (Provide material as specified herein)	MANUFACTURER & MODEL	ANNUAL ESTIMATED QUANTITIES	UNITS	UNIT COST REGULAR RATE	UNIT COST OVERTIME RATE	TOTAL COST REGULAR RATE
1.	Aluminum Single Hung Window & Frames		2500	Sq. Ft	\$	\$	\$
2.	Aluminum Double Hung Window & Frames		1,000	Sq. Ft.	\$	\$	\$
3.	Aluminum Slider Window & Frames		1,000	Sq. Ft.	\$	\$	\$

QUOTATION FORM – CONTINUED (Page 2 of 7)

COMPANY NAME: _____

					<i>ALL INCLUSIVE COST INCLUDING ALL MATERIALS, LABOR AND ACCESSORIES</i>		
ITEM #	DESCRIPTION (Provide Material as Specified herein)	MANUFACTURER & MODEL	ANNUAL ESTIMATED QUANTITIES	UNITS	UNIT COST REGULAR RATE	UNIT COST OVERTIME RATE	TOTAL COST REGULAR RATE
4.	Aluminum Projected Windows & Frames		500	Sq. Ft.	\$	\$	\$
5.	Aluminum Fixed Window & Frames		1,250	Sq. Ft.	\$	\$	\$
6.	Aluminum Casement Windows & Frames		1,000	Sq. Ft.	\$	\$	\$
7.	Fiberglass Fixed Windows and Frames		250	Sq. Ft.	\$	\$	\$
8.	Fiberglass Projected Windows & Frames		250	Sq. Ft.	\$	\$	\$
9.	Fiberglass Casement Windows & Frames		250	Sq. Ft.	\$	\$	\$
10.	Fiberglass Single Hang Windows & Frames		250	Sq. Ft.	\$	\$	\$
11.	Fiberglass Double Hung Windows & Frames		250	Sq. Ft.	\$	\$	\$
12.	Fiberglass Slider Windows & Frames		250	Sq. Ft.	\$	\$	\$
13.	Steel Doors & Frames including all Hardware and Accessories (Hollow Metal with Steel Stiffners)		600	Sq. Ft.	\$	\$	\$
14.	Steel Doors including all Hardware and Accessories (Hollow Metal with Steel Stiffners)		600	Sq. Ft.	\$	\$	\$

QUOTATION FORM – CONTINUED (Page 3 of 7)

COMPANY NAME: _____

					<i>ALL INCLUSIVE COST INCLUDING ALL MATERIALS, LABOR AND ACCESSORIES</i>		
ITEM #	DESCRIPTION (Provide Material as specified herein)	MANUFACTURER & MODEL	ANNUAL ESTIMATED QUANTITIES	UNITS	UNIT COST REGULAR RATE	UNIT COST OVERTIME RATE	TOTAL COST REGULAR RATE
15.	Steel Doors & Frames Including all Hardware And Accessories (Polystyrene Cores)		600	Sq. Ft.	\$	\$	\$
16.	Steel Doors Including all Hardware and Accessories (Polystyrene Cores)		600	Sq. Ft.	\$	\$	\$
17.	Window Lights 4" X 25"		50	each	\$	\$	\$
18.	Window Lights 20" X 30"		25	each	\$	\$	\$
19.	Transoms and Side Window Lights in Hollow Metal Frames		250	Sq. Ft.	\$	\$	\$
20.	Non-Fire Rated Interior Wood Doors including all Hardware and Accessories		1,000	Sq. Ft.	\$	\$	\$
21.	Fire Rated Interior Wood Doors including all Hardware and Accessories		1,000	Sq. Ft.	\$	\$	\$
22.	Sound Retardant Wood Door including all Hardware and Accessories		100	Sq. Ft.	\$	\$	\$
23.	Glass units only – see General Requirements		200	Sq. Ft.	\$	\$	\$

QUOTATION FORM – CONTINUED (Page 4 of 7)

COMPANY NAME: _____

					<i>ALL INCLUSIVE COST INCLUDING ALL MATERIALS, LABOR AND ACCESSORIES</i>		
ITEM #	DESCRIPTION (Provide Material as specified herein)	MANUFACTURER & MODEL	ANNUAL ESTIMATED QUANTITIES	UNITS	UNIT COST REGULAR RATE	UNIT COST OVERTIME RATE	TOTAL COST REGULAR RATE
24.	Louvers shall be NGP FLDL-SG1 or MCPS approved equal for fire rated louvers		10	Sq. Ft.	\$	\$	\$
25.	NGP L-A700 or MCPS approved equal for no vision and partition louvers		10	Sq. Ft.	\$	\$	\$
26.	Total cost for items 1 thru 25 – Regular Rate		N/A	N/A	\$	\$	\$

QUOTATION FORM – CONTINUED (Page 5 of 7)

COMPANY NAME: _____

- **HAS THE BIDDER PERFORMED THEIR PRELIMINARY RESEARCH IN IDENTIFYING MINORITY BUSINESS ENTERPRISE PARTICIPATION AND INCLUDED WITH THEIR BID SUBMISSION THE COMPLETED CERTIFIED MINORITY BUSINESS ENTERPRISE UTILIZATION AND FAIR SOLICITATION AFFIDAVIT ATTACHMENT (A) AND THE MINORITY BUSINESS ENTERPRISE PARTICIPATION SCHEDULE ATTACHMENT (B)?**

YES _____ NO _____

- **HAS THE BIDDER EVER HAD LATE CHARGES DEDUCTED AS A RESULT OF FAILURE TO COMPLETE ON TIME?**

YES _____ NO _____

- **HAS BIDDER SUPPLIED DOOR AND WINDOW MANUFACTURER'S LITERATURE FOR PRODUCTS OFFERED ON THE QUOTATION FORM?**

YES _____ NO _____

- **IS THE BIDDER AN AUTHORIZED REPRESENTATIVE AND INSTALLER OF THE PRODUCT OFFERED?**

YES _____ NO _____

QUOTATION FORM – CONTINUED (Page 6 of 7)

COMPANY NAME: _____

- **HAS THE BIDDER READ THE BIDDING DOCUMENT IN DETAIL PRIOR TO SUBMITTING THEIR BID?**

YES _____ NO _____

- **HAS BIDDER INCLUDED WITH THEIR BID SUBMISSION A LETTER CERTIFYING THEY HAVE BEEN IN BUSINESS A MINIMUM OF FIVE YEARS, AND HAVE A MINIMUM OF FIVE YEARS EXPERIENCE PERFORMING THE TYPE OF WORK SPECIFIED HEREIN?**

YES _____ NO _____

- **IS A COPY OF THE MARYLAND; CONSTRUCTION BUSINESS LICENSE SUPPLIED WITH BID SUBMISSION?**

YES _____ NO _____

- **HAS BIDDER FAMILIARIZED THEMSELVES WITH THE ANNOTATED CODE OF MARYLAND SECTION 11-722 AND HAVE SCREENED THEIR WORK FORCES, ENSURING NO REGISTERED SEX OFFENDER WILL BE PERFORMING WORK AT ANY MCPS FACILITY?**

YES _____ NO _____

- **ASBESTOS FREE MATERIALS: THE BIDDER HAS REVIEWED THE MATERIAL LABORATORY TESTING REQUIREMENTS FOR THE LIST OF MATERIAL SPECIFIED HEREIN TO CONFIRM THEY DO NOT CONTAIN ASBESTOS? THE SUCCESSFUL CONTRACTOR SHALL SUBMIT ASBESTOS FREE VERIFICATION FORM(S) AS SPECIFIED HEREIN.**

YES _____ NO _____

QUOTATION FORM – CONTINUED (Page 7 of 7)

COMPANY NAME: _____

- **IS THE CONTRACTOR CERTIFIED AS A “LEAD SAFE FIRM”, OR IF NOT DOES THE CONTRACTOR AGREES TO, OBTAIN THIS CERTIFICATION WITHIN 90 DAYS, AFTER NOTIFICATION OF BEING THE APPARENT LOW BIDDER?**

YES _____ NO _____

CHECK OFF LIST FOR MANDATORY BID SUBMITTAL

Mandatory Submittals Check List:

- _____ **Signed Invitation for Bid, including Non-Debarment Acknowledgement**
- _____ **Quotation Form, (pages 1-6)**
- _____ **Addendum/Erratum (If any, contractor is responsible to confirm)**
- _____ **MBE Attachments A and B**
- _____ **Maryland; Construction Business License**
- _____ **Letter of Experience and years in Business as specified**
- _____ **Surety Letter from Bonding Company**
- _____ **References**
- _____ **Manufacturers Literature Door & Window**