

BID ITEM WORKBOOK

COSTARS-8 Maintenance, Repair & Operation Equipment & Supplies ("MRO")

INSTRUCTIONS TO COMPLETE BID ITEM WORKBOOK TABS LOCATED AT BOTTOM OF PAGE.

This is a BID ITEM WORKBOOK to assist you in the bidding process. **COMPLETION OF THIS WORKBOOK IS MANDATORY.**

DOCUMENTS REQUIRED TO BE SUBMITTED WITH BID ITEM WORKBOOK (CHECKLIST) TAB

Please use the CHECKLIST provided to assist you in the bidding process.

BIDDER/CONTRACTOR DATA TAB

NAME – In the spaces provided, the bidder shall enter the name (both legal name and D/B/A name, if applicable) for each of the following: (a) the Bidder/Contractor; (b) send purchase order(s) to; and (c) send payment(s) to. If the legal name registered with the IRS is different than the stated name, then both the legal name and the D/B/A name are required.

ADDRESS – In the spaces provided, the bidder shall enter the address for each of the following: (a) the Bidder/Contractor; (b) send purchase order(s) to; and (c) send payment(s) to.

VENDOR NUMBER – In the space provided, the bidder shall enter the six-digit vendor number issued by the Commonwealth to the Bidder/Contractor (refer to Attachment A, *Doing Business with the Commonwealth*, for guidance).

POINT OF CONTACT – In the spaces provided, the bidder shall enter the name, telephone number, fax number and E-mail address of the Point of Contact ("POC") for each of the following: (a) the Bidder/Contractor; (b) placing purchase orders, and (c) making payment.

BIDDER'S GENERAL WEBSITE ADDRESS - In the space provided, the bidder shall enter its General Website Address.

QUESTIONS TAB

BIDDERS/CONTRACTOR'S LEGAL NAME - In the space provided, the bidder shall enter its legal name.

QUESTIONS – The bidder shall fully answer ALL questions. Use the COMMENTS area when necessary to explain or clarify your response to a question.

LIST OF AUTHORIZED DEALERS - If the bidder answers "Yes" to question number 9, the bidder shall also complete and submit the List of Authorized Dealers.

SERVICE AREA TAB

BIDDERS/CONTRACTOR'S LEGAL NAME - In the space provided, the bidder shall enter its legal name.

SERVICE AREA BOXES - The bidder shall click the appropriate box(es) for the location(s) where the bidder is offering to make contract sales.

PRODUCT CATEGORY/MANUFACTURER LIST TAB

BIDDERS/CONTRACTOR'S LEGAL NAME - In the space provided, the bidder shall enter its legal name.

PRODUCT CATEGORY/MANUFACTURERS - The bidder must identify the product category(ies) and manufacturer line(s) for the items that the bidder is offering.

ANCILLARY SERVICES TAB

BIDDERS/CONTRACTOR'S LEGAL NAME - In the space provided, the bidder shall enter its legal name.

ANCILLARY SERVICES - A Contractor may choose to offer ancillary services in conjunction with the products it provides to the Purchaser. However, any ancillary services offered must be: (1) expressly authorized in the original IFB/Contract, (2) directly related to the delivery, or normal use of the product or component parts purchased, (3) limited to the actual product or component parts purchased, and (4) initiated/ordered at the time of product purchase. Stand-alone services and services for products not purchased from this supply Contract, including existing equipment for which component parts from this contract are purchased, are not within the scope of this supply Contract. The Department of General Services reserves the right to determine which ancillary services shall be included in any contract.

BID ITEM SHEET TAB (The Bid Item Workbook should contain a separate Bid Item Sheet for each manufacturer's price list or cost sheet.)

BIDDERS/CONTRACTOR'S LEGAL NAME - In the space provided, the bidder shall enter its legal name.

MANUFACTURER – In the space provided, the bidder shall enter the manufacturer's name.

PRICING STANDARD – The bidder shall identify the pricing standard, either the manufacturer's or distributor's most recently published price list, cost plus, or custom list.

PRICE LIST IDENTIFICATION – The bidder shall specify the price list name, identification number (if applicable), and effective date in the spaces provided. Omission of this information from the Bid Item Sheet shall be cause for DGS to reject the bid. Upon DGS request, the bidder shall submit a complete price list to DGS within two working days.

CLASS OF PURCHASE – If the bidder wishes to offer an educational purchase or other category of purchase at a different price, indicate here.

PRICING TEMPLATE – It is suggested, but not required, that the Bidder submit its pricing using the attached sample pricing template. The Bidder shall attach and submit any different format with its Bid Item Workbook.



BID ITEM WORKBOOK

COSTARS-8 Maintenance, Repair & Operation Equipment & Supplies ("MRO") DOCUMENTS REQUIRED TO BE SUBMITTED WITH BID ITEM WORKBOOK

The following documents must be submitted with your completed BID ITEM WORKBOOK.

- GSPUR-15 COSTARS, COSTARS BID/CONTRACT, completed and signed in ink.
- Evidence of DEPARTMENT OF STATE CERTIFICATION, if applicable (refer to Attachment A, *Doing Business with the Commonwealth*, for guidance).
- CORPORATE CERTIFICATION or other appropriate signature authorization if someone other than one of the officers signs the GSPUR-15 COSTARS, COSTARS BID/CONTRACT for the Bidder/Contractor (for a corporation; other business entities should specify the title of the person signing). The form, *Corporate Certification*, is provided for the Bidder's convenience. Other appropriate forms of signature authorization are also acceptable.
- Printed copy of DEPARTMENT OF GENERAL SERVICES SELF-CERTIFIED SMALL BUSINESS active certificate, if applicable.
- STATE OF MANUFACTURE CHART (Refer to Reciprocal Limitations Act Requirements (GSPUR-89) for guidance.)
- ONE HARD (PRINTED) COPY OF THE BID. In addition, the Bidder is encouraged to include in its bid package an electronic submission of the Bid Item Workbook including all offered items and pricing on a CD or USB and in an unprotected format (Microsoft Word or Excel).
- ADDENDUM(S), if applicable, should be attached to original copy of bid proposal with your acknowledgement of acceptance of each addendum either noted on its face by a signature, or by separate cover memo. When you download a bid package from the DGS Bureau of Procurement web-pages, you are responsible to check back at the site in the event an "addendum" or change is posted to the solicitation.
- Address bid proposal to DGS BUREAU OF PROCUREMENT, BID ROOM, 555 WALNUT STREET, 6TH FLOOR, HARRISBURG, PA 17101-1914, regardless of the chosen method of delivery. Please refer to Section 1 of the *Instructions to Bidders for COSTARS Contracts* for additional information regarding bid submission.

SMARTEDGETM
Solutions for Better Buildings



BID ITEM WORKBOOK**COSTARS-8 Maintenance, Repair & Operation Equipment & Supplies ("MRO")****BIDDER/CONTRACTOR DATA**

BIDDER/CONTRACTOR'S LEGAL NAME:	Building Controls & Services, Inc.	
D/B/A NAME, IF APPLICABLE:	SmartEdge	
BIDDER ADDRESS:	2002 Filmore Avenue Box #6	
	Erie, PA 16506	
COUNTY LOCATED IN:	Erie County	
	PA Legislative House District Number <u>District 3</u>	PA Legislative Senate District Number <u>District 49</u>
VENDOR NUMBER:	184073	
DGS Self-Certified Small Business (SB) <input checked="" type="checkbox"/>	Certification Number	184073-2014-04-SB
Primary POC regarding IFB/Contract:	Sabrina Carpenter	
Secondary POC regarding IFB/Contract:	Jim Mistretta	
PHONE NUMBER:	716-664-7755 x 135	
FAX NUMBER:	716-664-5825	
EMAIL ADDRESS:	scarpenter@smartedgeusa.com	
COMPANY'S GENERAL WEBSITE ADDRESS	www.smartedgeusa.com	

SEND PURCHASE ORDER(S) TO NAME:	Building Controls & Services, Inc.	
D/B/A NAME, IF APPLICABLE:	SmartEdge	
ADDRESS:	4 Pequet Parkway	
	Tonawanda, NY 14150	
COUNTY LOCATED IN:	Erie	
HOURS OF OPERATION:		
POC regarding PURCHASE ORDER(S):	Tina Nati	
PHONE NUMBER:	716-693-7220 x 203	
FAX NUMBER:	716-693-0648	
EMAIL ADDRESS:	tnati@smartedgeusa.com	

SEND PAYMENT(S) TO NAME:	Building Controls & Services, Inc.	
D/B/A NAME, IF APPLICABLE:	SmartEdge	
ADDRESS:	4 Pequet Parkway	
	Tonawanda, NY 14150	
POC regarding PAYMENT(S):	Tina Nati	
PHONE NUMBER:	716-693-7220 x 203	
FAX NUMBER:	716-693-0648	
EMAIL ADDRESS:	tnati@smartedgeusa.com	



BID ITEM WORKBOOK

COSTARS-8 Maintenance, Repair & Operation Equipment & Supplies ("MRO")

QUESTIONS

BIDDERS/CONTRACTOR'S LEGAL NAME: Building Controls & Services, Inc. (dba SmartEdge)

PLEASE BE ADVISED - COMPLETE ALL QUESTIONS AND EXPLANATIONS FOR YOUR BID TO BE ACCEPTED AS A RESPONSIBLE AND RESPONSIVE BID

The bidder must answer the following questions:

QUESTION	YES	NO	EXPLANATION
1) Does the Bidder-Contractor have any minimum order requirements? If yes, please explain.		X	
2) In accordance with Section 14 of the <i>Standard Terms and Conditions</i> , the Contractor shall deliver all item(s) F.O.B. Destination. a.) Is the Bidder-Contractor quoting shipping costs as a separate line item?		X	a.) Shipping will be quoted on a separate line item
b.) If no, is the Bidder-Contractor including shipping costs in its pricing?		X	
3) Does the Bidder-Contractor offer any pricing incentive(s) such as for Internet ordering? If yes, please explain.		X	
4) Does the Bidder-Contractor offer any prompt payment discount(s)? If yes, please explain.		X	
5) a.) Does the Bidder-Contractor accept credit card(s) as a method of payment from any Purchaser? If yes, please specify the particular type(s) of card(s) accepted:	X		Visa & Mastercard
b.) If yes, does the Bidder-Contractor charge any fee(s) to the Purchaser for payment(s) made by credit card? If yes, please explain.		X	
6) Does the Bidder-Contractor charge any late fee(s) to the Purchaser for payment not made in accordance with Section 11 of the <i>Standard Terms and Conditions</i> ? If yes, please explain.		X	
7) After notification of contract award, is the Bidder-Contractor willing to further negotiate pricing with COSTARS members?	X		
8) Does the Bidder-Contractor offer lease and installment purchases?			Not applicable to this contract.
9) If the Bidder is a manufacturer bidding directly, does the Bidder wish to offer contract items via its dealer network? If yes, please complete LIST OF AUTHORIZED DEALERS sheet of this workbook including supplier information and stating any dealer's territory breakdown (such as counties, municipalities, or regions). Also, indicate on the Bidder-Contractor Data Sheet a representative for Purchasers to contact regarding POs and payment.		X	
10) Is the Bidder-Contractor going to provide a dedicated COSTARS website for Purchasers (see Section 9 of the <i>Standard Terms and Conditions</i>)? If yes, how much time after notification of contract award will the Bidder-Contractor need to have the website up and running?	X		30 Business Days



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SERVICE AREA

BIDDERS/CONTRACTOR'S LEGAL NAME: _____ Building Controls & Services, Inc. (dba SmartEdge)

Please refer to Section 5 of the COSTARS Contract Special Terms and Conditions for guidance.

SERVICE AREA

Statewide

OR

- | | | | | | |
|---|---------------|---|---------------|---|-------------------|
| | 1 Adams | x | 24 Elk | x | 47 Montour |
| x | 2 Allegheny | x | 25 Erie | | 48 Northampton |
| x | 3 Armstrong | | 26 Fayette | | 49 Northumberland |
| x | 4 Beaver | x | 27 Forest | | 50 Perry |
| | 5 Bedford | | 28 Franklin | | 51 Philadelphia |
| | 6 Berks | | 29 Fulton | | 52 Pike |
| | 7 Blair | | 30 Greene | x | 53 Potter |
| | 8 Bradford | | 31 Huntingdon | | 54 Schuylkill |
| | 9 Bucks | x | 32 Indiana | | 55 Snyder |
| | 10 Butler | | 33 Jefferson | | 56 Somerset |
| | 11 Cambria | | 34 Juniata | | 57 Sullivan |
| | 12 Cameron | | 35 Lackawanna | | 58 Susquehanna |
| | 13 Carbon | | 36 Lancaster | | 59 Tioga |
| x | 14 Centre | x | 37 Lawrence | | 60 Union |
| | 15 Chester | | 38 Lebanon | x | 61 Venango |
| x | 16 Clarion | | 39 Lehigh | x | 62 Warren |
| x | 17 Clearfield | | 40 Luzerne | x | 63 Washington |
| | 18 Clinton | | 41 Lycoming | | 64 Wayne |
| | 19 Columbia | x | 42 McKean | x | 65 Westmoreland |
| x | 20 Crawford | x | 43 Mercer | | 66 Wyoming |
| | 21 Cumberland | | 44 Mifflin | | 67 York |
| | 22 Dauphin | | 45 Monroe | | |
| | 23 Delaware | | 46 Montgomery | | |



BID ITEM WORKBOOK

COSTARS-8 Maintenance, Repair & Operation Equipment & Supplies ("MRO")

PRODUCT CATEGORY/MANUFACTURER LIST

BIDDERS/CONTRACTOR'S LEGAL NAME: _____

Building Controls & Services, Inc. (dba SmartEdge)

The bidder must identify the product category(ies) and manufacturer line(s) for the items that the bidder is offering. If the Bidder is not a manufacturer, it must certify in writing listing all manufacturers for which the Bidder is authorized to sell those manufacturer's goods and materials, as required by this Contract. Refer to Paragraph 7.b. of the *Instructions to Bidders for COSTARS Contracts* for further guidance.

	PRODUCT CATEGORY <i>(Identify all that are applicable with a checkmark.)</i>	MANUFACTURERS <i>(State ALL that are applicable. Attach additional sheet(s) to this workbook if necessary.)</i>
X	Electrical Supplies	Square D, Schneider Electric, APC, Belimo, Moxa, Smart Measurement, Viconics
	Flooring Materials	
	General Hardware	
	Hand & Power Tools	
X	HVAC Equipment, Parts & Accessories	Schneider Electric/ Invensys, I/A Series, Tridium, Johnson Controls, Fraser-Johnston, Envirotek, Connect Air (wire), Functional Devices, AERCO, BAPI
	HVAC Filters	
	Industrial Plumbing Supplies	
	Lamps and Ballasts	
X	LED Lighting Fixtures, Bulbs & Accessories	Lutron, Deltavation
	Material Handling Equipment & Supplies including Warehouse Machinery & Attachments	
	Metalworking Machinery	
	Motors and Power Transmission	
	Outdoor Tools	
	Paint & Painting Supplies	
X	Pneumatic Equipment & Components	Schneider Electric, Johnson Controls
	Pumps and Plumbing Supplies	
	Safety Equipment & Supplies	
X	Security Products	Aiphone, Altronix, Assa Abloy, Axis Communications, OnSSI, Pelco, RS2, CommendUSA, Ditek, Milestone, Mircom, Watchnet, Securitron, Telecor, Schneider Electric
	Test Equipment, Instruments & Replacement Parts or Accessories	



BID ITEM WORKBOOK
COSTARS-8 Maintenance, Repair & Operation Equipment & Supplies ("MRO")
BID ITEM SHEET

BIDDERS/CONTRACTORS LEGAL NAME: **Building Controls & Services, Inc. (dba SmartEdge)**

PRICING
 The Bidder may offer any type of discount, mark-up, or other pricing structure such as multiple discounts for different lines of products, or different price lists, or different classes of Purchasers, or different prices for different quantities of products. Please reference Subsection 6.b. of the Special Terms and Conditions for further guidance.
 After Contract award, a Contractor may offer, either on its own initiative or at a Purchaser's request, additional discounts, reduced mark-ups, customized lists, or discounted prices for any purchase within the scope of the Contract, even if such discounts, mark-ups, or discounted prices were not included in the bid prices.

The Bid Item Workbook should contain a separate Bid Item Sheet for each manufacturer's price list or cost sheet.

MANUFACTURER: **Schneider Electric & See List Below**

PRICING STANDARD: (Check that which is applicable.) Catalog or Manufacturer's/Distributor's Most Recently Published Price
 Suppliers Cost Plus % Mark-Up
 Custom List including Net Prices

PRICE LIST IDENTIFICATION:
 CATALOG OR PRICE LIST NAME: **Most recent pricelist for each Manufacturer listed below starting 1/1/2016**
 IDENTIFICATION NO. (IF APPLICABLE): _____
 EFFECTIVE DATE: _____
 CLASS OF PURCHASER: _____
 (i.e. All Purchasers or separate lines for specific classes, such as Educational Purchasers and Non-educational Purchasers.)

SAMPLE PRICING TEMPLATE <i>It is suggested, but not required, that the Bidder submit pricing using the template. The Bidder shall attach and submit any different format with its Bid Item Workbook.</i>		EXAMPLE - VOLUME PRICING		
ITEM CATEGORY	VOLUME BAND I [SPECIFY QUANTITY] % DISCOUNT FROM LIST PRICE	VOLUME BAND II [SPECIFY QUANTITY] % DISCOUNT FROM LIST PRICE	VOLUME BAND III [SPECIFY QUANTITY] % DISCOUNT FROM LIST PRICE	
<i>Sample 1 - Percent Discount(s) from identified Catalog or Manufacturer/Distributor's Price List. Discounts shall remain firm for the entire</i>	_____ %	_____ %	_____ %	
<i>Sample 2 - Percent Mark-up above the Suppliers Specified Cost. Mark-ups shall remain firm for the entire contract period. (Reference Special Terms and</i>	VOLUME BAND I [SPECIFY QUANTITY] % MARK-UP ABOVE COST SHEET _____ %	VOLUME BAND II [SPECIFY QUANTITY] % MARK-UP ABOVE COST SHEET _____ %	VOLUME BAND III [SPECIFY QUANTITY] % MARK-UP ABOVE COST SHEET _____ %	
<i>Sample 3 - Customized List. A Contractor may update its Contract pricing information. (Reference Special Terms and Conditions, Subsection 6.c.)</i>	VOLUME BAND I [SPECIFY QUANTITY] \$ _____	VOLUME BAND II [SPECIFY QUANTITY] \$ _____	VOLUME BAND III [SPECIFY QUANTITY] \$ _____	

HVAC PRODUCTS		SECURITY PRODUCTS	
Belimo - List price less 50%	APC - List price less 0%	Aiphone - List price less 15%	Schneider Electric - List price less 50%
Johnson Controls - List price less 15%	Fraser- Johnston - List price less 0%	Altronix- List price less 8%	CommendUSA - List price less 15%
Moxa - List price less 5%	Enviro-tec - List price 0%	Assa Abloy- List price less 8%	Ditek - List price less 10%
Schneider Electric/Invensys-I/A Series, Tridium - List price less 50%	Connect Air (wire) - List price less 0%	Axis Communications - List price less 3%	Milestone - List price less 5%
Smart Measurement - List price less 5%	Functional Devices - List price less 0%	OnSSI - List price less 3%	Mircom - List price less 15%
Viconics - List price less 50%	AERCO - List price less 0%	Pelco - List price less 35%	Watchnet - List price less 35%
Square D - List price less 50%	BAPI - List price less 0%	RS2 - List price less 18%	Securitron - List price less 30%
LED LIGHTING		Deltavation - List price less 5%	Telecor - List price less 15%
		Lutron - List price less 0%	



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ANCILLARY SERVICES, IF APPLICABLE

BIDDERS/CONTRACTOR'S LEGAL NAME: _____

Building Controls & Services, Inc. (dba SmartEdge)

A Contractor may choose to offer ancillary services in conjunction with the products it provides to the Purchaser. However, any ancillary services offered must be: (1) expressly authorized in the original IFB/Contract, (2) directly related to the delivery, installation or normal use of the product or component parts purchased, (3) limited to the actual product or component parts purchased, and (4) initiated/ordered at the time of product purchase. Stand-alone services and services for products not purchased from this supply Contract, including existing equipment for which component parts from this contract are purchased, are not within the scope of this supply Contract. The Department of General Services reserves the right to determine which ancillary services shall be included in any contract.

Refer to Paragraph 8 of the *COSTARS Contract Special Terms and Conditions* for further guidance.

	ANCILLARY SERVICES	PRICING
<input checked="" type="checkbox"/>	Customization	Pricing will be negotiated directly with COSTARS member and on a project by project basis.
<input checked="" type="checkbox"/>	Special Delivery Arrangements	Pricing will be negotiated directly with COSTARS member and on a project by project basis.
<input checked="" type="checkbox"/>	Training	Pricing will be negotiated directly with COSTARS member and on a project by project basis.
<input checked="" type="checkbox"/>	Extended Warranty	Pricing will be negotiated directly with COSTARS member and on a project by project basis.
<input checked="" type="checkbox"/>	Post Warranty Support and Maintenance Service	Pricing will be negotiated directly with COSTARS member and on a project by project basis.
<input checked="" type="checkbox"/>	Assembly/Installation/Construction Activities	Pricing will be negotiated directly with COSTARS member and on a project by project basis.

The Bidder may submit the list of ancillary services and prices it proposes to offer. If it is not possible to submit pricing, as may be the case with certain installation services, the Bidder shall simply note that it is offering the service and that the actual price will be negotiated between it and the COSTARS participant and annotated on the purchase order at time of order.

