

Bidder Name: _____

BID FP # 23B-2277

I

INVITATION FOR BID

**INSTRUCTIONS AND SPECIFICATIONS
FOR**

LEDGES GOLF CLUBHOUSE HEATING AND AIR CONDITIONING

The Board of Commissioners of the Winnebago County Forest Preserve District will receive sealed bids in the Winnebago County Forest Preserve District, 5500 Northrock Drive, Rockford, IL. 61103 until 10:00 A.M. on March 10, 2023.

A MANDATORY Pre-Bid meeting will be held on February 28, 2023 at 10:00 A.M. at Ledges Golf Clubhouse, 7111 McCurry Road, Roscoe, IL. 61073.

A public opening and reading will be held at this date and time.

ALL BIDS MUST BE ENCLOSED IN SEALED ENVELOPES MARKED:

**“LEDGES GOLF CLUBHOUSE HEATING AND AIR CONDITIONING”
March 10, 2023 at 10:00 A.M.**

The Board of Commissioners reserves the right to accept or reject any and all bids or to waive technicalities, or to accept any item of any bid. Information is available from the Purchasing Department, Winnebago County Administration Building, Telephone: (815) 319-4380, Email purchasing@purchasing.wincoil.gov

The documents constituting component parts of the Bid Form are the following:

- I. Invitation for Bid
- II. Requirements for Bidding and Instructions to Bidders
- III. Information Sheet
- IV. Detailed Specifications
- V. Bid Forms

Legal Advertisement for Bids published in the Rockford Register Star on February 22, 2023 or visit our website <http://wincoil.gov/> or the Forest Preserve website <http://winnebagoforest.org/>

II

REQUIREMENTS FOR BIDDING AND INSTRUCTIONS TO BIDDERS

PREPARATION OF BID OR PROPOSAL

The bidder must submit a bid or proposal on the forms furnished by the Purchasing Department. All blank spaces on the bid or proposal form must be filled in. Authorized signature must be the individual owner of a proprietorship, a general partner of a partnership, or signed in the name of a corporation by an officer whose title shall be stated. Bids or proposals shall be sealed in an envelope and marked as required in the instructions. The bid or proposal is contained in these documents and must remain attached hereto when submitted.

TAXES NOT APPLICABLE

The Winnebago County Forest Preserve District as a Governmental Unit pays neither Federal Excise Tax nor Illinois Retailers Occupational Tax, and therefore, those taxes should be excluded from bid. Our Tax Exempt Number is: E9992-3483-07.

PROMPT PAYMENT ACT

The bid should provide that all payments are subject to the Local Governmental Prompt Payment Act.

WITHDRAWAL OF BIDS OR PROPOSALS

Any bidder may withdraw their bid or proposal at any time prior to the time specified in the advertisement as the closing time for the receipt of bids or proposals by signing a request therefore. However, no bidder shall withdraw or cancel his bid or proposal for a period of sixty (60) days after said advertised closing time for the receipt of bids or proposals; the successful bidder shall not withdraw or cancel their bid or proposal after having been notified by the Director of Purchasing that said bid or proposal has been accepted by the Forest Preserve Board of Commissioners.

CATALOGS

Each bidder shall submit catalogs, descriptive literature, and detailed drawings, where applicable, to fully illustrate and describe the material and/or work they propose to furnish.

CANCELLATION

The Winnebago County Forest Preserve District reserves the right to cancel any contract in whole or in part without penalty due to failure of the contractor to comply with terms, conditions and specifications of this contract.

COST OF BID OR PROPOSAL

Expenses incurred in the preparation of proposals in response to this bid or proposal is the Bidder's sole responsibility.

II

REQUIREMENTS FOR BIDDING AND INSTRUCTIONS TO BIDDERS (CONTINUED)

USE OF TRADE NAMES

In cases where a specified item is identified by a manufacturer's name, trade name, or other references, it is understood that the bidder proposes to furnish the item identified. If the bidder proposes to furnish an "equal," the proposed "equal" item must be so indicated in the written bid or proposal. The County shall be the sole determiner of the equality of the substitute offered.

DELIVERIES

All materials shipped to the Winnebago County Forest Preserve District must be shipped F.O.B. designated location, County of Winnebago, Rockford, Illinois.

DEVIATIONS, EXCEPTIONS OR ALTERNATES

Deviations, exceptions or alternates from terms, conditions, or specifications shall be described fully, on bidder's letterhead, signed, and attached to the Bid. In the absence of such statement, the bid shall be accepted as in strict compliance with all terms, conditions, and specifications and the bidder shall be held liable. Bidders are cautioned to avoid making deviations and exceptions to the specifications, which may result in rejection of their bid or proposal. If deviations, exceptions or alternates are submitted, it is the Winnebago County Purchasing Director's sole and final decision whether specifications have been met and will be considered for award.

CASH DISCOUNTS

In determination of award, cash discounts will only be considered when all other conditions are equal.

ORDERING

Purchase orders shall be placed directly to the contractor by an authorized agent of the Winnebago County Forest Preserve. No other purchase orders are authorized.

COMPLIANCE WITH LAWS

All services, work and materials must comply with all federal and state laws, County ordinances, rules and regulations that in any manner affect the production and sale of the product or service contained herein. In the event federal or state funds are being used to fund this contract; additional certifications, attached as addenda, will be required. Lack of knowledge on the part of the vendor will in no way be cause for release of this obligation. If the District becomes aware of violation of any laws on the part of the vendor, it reserves the right to reject any bid, cancel any contract and pursue any other legal remedies deemed necessary.

II

**REQUIREMENTS FOR BIDDING AND INSTRUCTIONS TO BIDDERS
(CONTINUED)**

INSURANCE

Bidder/Contractor shall provide insurance to protect him and the District from claims, which may arise out of, or resulting from operations on this construction. Proof of insurance shall be submitted to the Forest Preserve District prior to construction. This insurance shall include the following types and limits:

- | | |
|--|---|
| A. Workmen’s Compensation
Employers Liability | Illinois Statutory Limits
\$500,000 |
| B. Comprehensive General Liability form | |
| Limits - Bodily Damage | \$300,000 per occurrence
\$500,000 aggregate |
| Property Damage | \$100,000 per occurrence
\$200,000 aggregate |
| C. Auto Insurance; Comprehensive form including, owned; non-owned and
hired autos, uninsured motorists. | |
| Limit - Same as General Liability | |

BID PROTEST

Firms wishing to protest bids or awards shall notify the Purchasing Director in writing within 30 days after the invitation to bid opening. The notification should include the bid number, the name of the firm protesting and the reason why the firm is protesting the bid. The Purchasing Director will respond to the protest within 5 calendar days.

DISPUTES

In case of disputes as to whether or not an item or service quoted or delivered meets specifications, the decision of the Purchasing Director, or authorized representative shall be final and binding to all parties.

ENTIRE AGREEMENT

These Standard Terms and Conditions of Bid or Proposal shall apply to any contract or order awarded as a result of this Request for Bid except where special requirements are stated elsewhere in the Request; in such cases the special requirements shall apply. Further, the written contract and/or order with referenced parts and attachments shall constitute the entire agreement and no other terms and conditions in any document, acceptance, or acknowledgement shall be effective or binding unless expressly agreed to in writing by the contracting authority.

PAY REQUEST

Forest Preserve makes payments once a month after the Board of Commissioners approval of invoices. The Board meets the third Wednesday of each month. The last day a pay request can be submitted for payment for the month is eight days before the Board meeting or the Tuesday a week before the Board Meeting.

II

REQUIREMENTS FOR BIDDING AND INSTRUCTIONS TO BIDDERS (CONTINUED)

NON-DISCRIMINATION

In connection with the performance of work under this contract, the contractor agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability, sexual orientation or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment of compensation, and selection for training, including apprenticeship. Except with respect to sexual orientation, the contractor further agrees to take affirmative action to ensure Equal Employment Opportunities. The contractor agrees to post in conspicuous places, available for employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of the Non-Discrimination Clause.

NON-COLLUSION

The Bidder, by its officers, agents or representatives (hereafter referred to as the Bidder) present at the time of filing this bid, say that neither they nor any of them, have in any way directly or indirectly, entered into any arrangement or agreement with any other Bidders, or with any public officer or the Winnebago County Forest Preserve District, Illinois, whereby, the Bidder has not paid or is to pay to such Bidder or public officer any sum of money, anything of value or has not directly or indirectly entered into any arrangement or agreement with any other Bidder or Bidders. Whereby, no inducement of any form or character other than that which appears upon the face of the bid will be suggested, offered, paid or delivered to any person whomsoever to influence the acceptance of the said bid or understanding of any kind whatsoever, with any person whomsoever to pay, deliver to, or share with any other person in any way or manner, any of the proceeds on the Contract sought by this bid.

NON-BARRED BIDDING

The bidder certifies, by submission of this proposal, that it is not barred from bidding on this contract because of a conviction for the violation of state laws prohibiting bid rigging or bid rotating.

CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION

The bidder certifies, by submission of this proposal or acceptance of this contract, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency. It further agrees by submitting this proposal that it will include this clause without modification in all lower tier transactions, solicitations, proposals, contracts, and

II

**REQUIREMENTS FOR BIDDING AND INSTRUCTIONS TO BIDDERS
(CONTINUED)**

subcontracts. Where the bidder/contractor or any lower tier participant is unable to certify to this statement, it shall attach an explanation to this solicitation/proposal. Additionally, for all new contractors and vendors to be paid the Purchasing Office will review the Excluded Parties List System prior to requesting the vendor be created in our accounting system.

The Bidder, by signing the bid form, acknowledges, understands and abides by all of the above "Requirements for Bidding and Instructions to Bidders".

III

INFORMATION SHEET

The Forest Preserves of Winnebago County is seeking pricing for Ledges Golf Clubhouse Heating and Air Conditioning.

PURPOSE & SCOPE OF JOB: To replace and update the existing HVAC system which provides heating and cooling to the customer areas of Ledges Golf Clubhouse. In addition to replacing HVAC equipment, additional modifications shall be made to improve overall airflow to select areas of the building including the clubhouse kitchen, bar area, & restrooms. The new HVAC system is to be installed with minimal impact to day-to-day operations and may not prohibit normal business from being conducted.

MANDATORY PRE-BID SITE MEETING REQUIRED FOR ALL BIDDERS ON FEBRUARY 28, 2023 AT 10:00 A.M. AT LEDGES GOLF CLUBHOUSE, 7111 McCURRY RD., ROSCOE, IL. 61073

Bidders must bid according to the detailed specifications. Any deviation must be submitted in writing with the Bid Response. It will be the Forest Preserves of Winnebago County's decision if any deviation meets the detailed minimum specifications. Their decision will be final.

Any request for information, clarification, etc. shall be submitted to Ann Johns, Director of Purchasing, 404 Elm Street, Room 202, Rockford, Illinois 61101, by email purchasing@purchasing.wincoil.gov

IV

DETAILED SPECIFICATIONS

SPECIFICATIONS;

- Replace and dispose of 2 (two) existing air conditioning units.
 - Replacement air condition units must meet or exceed the following specifications:
 - Tonnage- 10 Ton
 - Electrical- 230v
 - Condensers- 3 Phase
 - Evaporator Coils- 4 matching

- Replace and dispose of 4 (four) existing furnaces.
 - Replacement furnaces must meet or exceed the following specifications:
 - Efficiency- 80%
 - BTU- 135,000

- Reconfigure vent piping to accommodate 2 (two) new supply ducts to kitchen area (providing 3 tons of cooling or more).
 - Relocate 2 (two) supply registers from golf shop to the bar area.
 - Remove old not needed ductwork in the mechanical room to make room for new duct
 - Rework furnace vent piping to make room for new duct to kitchen
 - Include booster fan for kitchen duct work
 - Connect it to one system
 - Connect to an existing duct up in the attic
 - Wire the fan to operate in conjunction with furnace blowers
 - Disconnect attic duct & cap it off

- Project shall include all of the following:
 - Wiring & controls
 - Twinning kits
 - 2 -stage programmable smart thermostats
 - Refrigerant piping
 - Sheet metal fittings & transitions
 - Gas piping
 - Venting to existing chimney
 - Condensate drain lines
 - Rigging
 - Start up
 - All necessary permitting
 - Warranty for HVAC units

IV

DETAILED SPECIFICATIONS (CONTINUED)

ADDITIONAL PROJECT NOTES;

1. May utilize attic areas for routing access
2. May utilize basement-ceiling areas for routing access, with permission to remove drywall or drop ceiling tiles as needed, with bid to include cleanup of debris.
3. Should utilize existing ductwork where possible, providing additional zones with junctions to existing.
4. Number of furnace units may be reduced if fewer, larger capacity units will serve the same purpose at a reduced cost.
5. **Work to be completed by May 1st 2023**

V

BID FORM

TO: Winnebago County Forest Preserve District
5500 Northrock Drive
Rockford, Illinois 61103

DATE: _____

The undersigned declares he has carefully examined the requirement, information sheet, detailed specifications and bid form. In addition, declares that this bid is made without any connection with any person making another bid, that the bid is in all respects fair and without collusion or fraud, that no member of the Winnebago County Forest Preserve District Board or other officer of the District, or any person in the employ of the County is directly or indirectly interested in this bid, or in any portion of the profits thereof.

OPTION 1 - BASE PROJECT COST (To include all minimum requirements listed above) \$_____

OPTION 2 - BASE + UPGRADE (To provide High Efficiency Furnaces instead of 80%) \$_____

ADD-ON COST (Provide 1 additional, separate thermostat controlled zone in kitchen) \$_____

Work to be completed by May 1st 2023 Yes _____

If NO Expected Date of Completion _____

ADDENDUM RECEIVED _____ **Of** _____

**BID FORM
(CONTINUED)**

Company Information:

Female Business Enterprise (FBE) Yes _____ No _____

Small Business Enterprise (SBE) Yes _____ No _____

Minority Business Enterprise (MBE) Yes _____ No _____

If yes, check the following boxes that apply:

Black/African American _____ Hispanic _____

Native American or Alaskan Native _____ Asian American _____

Type of Organization:

Individual _____ Partnership _____ Corporation _____ Other _____

SIGNATURE _____

PRINT/TYPE SIGNATURE _____

CONTACT PERSON _____

COMPANY _____

ADDRESS _____

CITY, STATE, ZIP _____

TELEPHONE NO. _____

FAX NO. _____

E-MAIL NO. _____

FEIN NO. _____



WINNEBAGO COUNTY

ILLINOIS

VENDOR REGISTRATION FORM

Vendor (or Individual) Legal Name: _____

DBA/Alternative Vendor Name: _____

ADDRESS(ES)

Physical

Remittance, if different from physical

Street 1

Street 2

City

State

ZIP

CONTACT(S)

Sales Representative

Accounts Receivable

Name

Phone

Email

Web Address

GENERAL INFORMATION

Scope of work to be performed or provided:

Services and/or Goods

Other _____

If Services: Legal Medical Rent/Landlord

Other _____

Do you have a current contract Yes No N/A

Winnebago County Employee: Yes or No If yes: Current or Former Dept. _____

COUNTY Department/Person requesting your service or goods:

CLASSIFICATION(S)

If applicable, check those boxes that apply:

(All Certifications must be included with this completed form)

Minority-Owned Business: Certified Self-Certified

Woman-Owned Business: Certified Self-Certified

Veteran-Owned Business: Certified Self-Certified

SIGNATURE

You affirm the above information is true and correct. Electronic signatures will not be accepted.

Authorized Signature: _____ Date Signed: _____

OFFICE USE ONLY

Approved by: _____

Assigned Vendor Number: _____

Verification Completed: Sam.gov OFAC IRS TIN Match

W-9 Uploaded

Date Entered: _____

Request for Taxpayer Identification Number and Certification

**Give Form to the
 requester. Do not
 send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.	See Specific Instructions on page 3.	<p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.</p> <hr/> <p>2 Business name/disregarded entity name, if different from above</p> <hr/> <p>3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.</p> <p> <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate </p> <p> <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ </p> <p>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</p> <p> <input type="checkbox"/> Other(seeinstructions)▶ _____ </p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p>
		<p>5 Address (number, street, and apt. or suite no.) See instructions.</p> <hr/> <p>6 City, state, and ZIP code</p> <hr/> <p>7 List account number(s) here (optional)</p>	<p>Requester's name and address (optional)</p>

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number											
				-			-				
OR											
Employer identification number											
				-							

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶ _____	Date ▶ _____
------------------	----------------------------------	--------------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

Form 1099-DIV (dividends, including those from stocks or mutual funds)

- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



WINNEBAGO COUNTY

— ILLINOIS —

SUSPENSION/DEBARMENT CERTIFICATION FORM

Non-Federal entities are prohibited from contracting with or making sub-awards under covered transactions to parties that are suspended or debarred or whose principals are suspended or debarred. Covered transactions include procurement for goods or services equal to or in excess of \$25,000.00. Contractors receiving individual awards for \$25,000.00 or more and all sub-recipients must certify that the organization and its principals are not suspended or debarred.

By submitting response to this solicitation and signing this form, the Bidder/Proposer certifies to the best of its knowledge and belief, that the company and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal, State or local governmental entity, department or agency;
2. Have not within a three-year period preceding this solicitation been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction, or convicted of or had a civil judgment against them for a violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. Have not within a three-year period preceding the signing of this certificate had one or more public transactions (Federal, State or local) terminated for cause or default.

If the Bidder/Proposer is unable to certify to any of the statements in this certification, Bidder/Proposer shall attach an explanation to this certification.

Vendor Name: _____

Address: _____

City: _____ ZIP: _____

Telephone: _____ Email Address: _____

Authorized Signature: _____

(Print) Name: _____ Title of Official: _____

Signature Date: _____

Purchasing Department | 404 Elm St, Rm 202, Rockford, IL 61101 | www.wincoil.us

Phone: (815) 319- 4380 | Email: purchasing@purchasing.wincoil.gov