

University of Central Florida

Elevator Maintenance Services



University of
**Central
Florida**

Otis Elevator

ITN: 1435MSA

Respondent Offer Submittal

Otis Elevator Company
Elevator Maintenance -Solicitation: 1435MSA

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A. Experience and Qualifications of Otis Elevator and Otis Staff

1. Otis Overview

Local Excellence

All our offices, 120 across the US, are staffed with technicians, supervisors and managers with experience on each type of equipment in use on your campus. Our local offices are known for their hands-on approach with a high level of supervision and an emphasis on strict compliance ensuring all maintenance is performed, repeat calls are eliminated, and technical problems are identified quickly, escalated and abated efficiently. Each of our Regions has dedicated engineers on staff to diagnose and fix technical problems and support the local offices within their respective region.

Most Advanced Maintenance Program in the Industry – OMMS®

The Otis Maintenance Management System (OMMS®) is the most advanced approach to maintenance in the industry. OMMS® prescribes maintenance procedures based on the actual usage of your elevators as opposed arbitrary routines driven by calendar base maintenance systems. OMMS® uses standard, well-defined maintenance procedures to ensure that the right maintenance is being performed at the right time, every time. The system pushes standardization across the entire Otis organization and the result is a level of consistent high performance unmatched in the industry.

While UCF has little Otis elevator equipment, you probably did not know that 40% of Otis's US based service portfolio is non-Otis equipment? Otis is uniquely structured with internal support to ensure that Otis can support all the makes and manufacturers of equipment that the university owns. Otis believes it spends more money preparing and educating offices i.e. field personnel regarding non-Otis equipment than any other company in the world.

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2. Current References

Florida Hospital Main Campus

601 E Rollins Ave Orlando, FL

- 115 Units, full time mechanic
- 15 Years of Service

Contact: Patrick Hebert

Email: patrickhebertjr@flhosp.org

Phone: 407-466-0209



Grande Lakes Ritz Carlton and Marriot Orlando Resort

4040 Central Florida Parkway Orlando, FL

- 36 Units, full time mechanic
- 13 Years of Service

Contact: Robert Brown

Email: robert.j.brown2@marriott.com

Phone: 407-393-4246



Pensacola Christian College

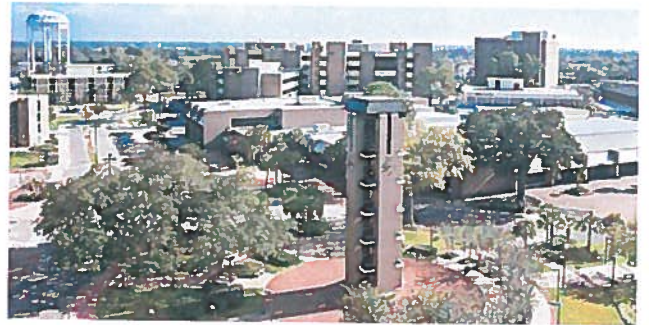
250 Brent Lane, Pensacola, FL

- 55 Units
- 8 Years of Service

Contact: Peter Harrington

Email: pharrington@pcci.edu

Phone: 850-969-1610



University of West Florida

- 36 Units
- 5 Years of Service

Contact: Howard Hesse

Email: hhesse@uwf.edu

Phone: 850-274-2113

Contact: Anthony Fisher

Email: Rfisher1@uwf.edu

Phone: 850-474-3248



3. Previous References

Orlando Regional Medical Center

Contract not renewed due to price

- 105 Units, full time mechanic
- 8 Years of Service

Contact: Wayne Gibbs

Email: terry.gibbs@orlandohealth.com

Phone: 321-841-6154

JP Morgan Chase

Contract not renewed due to price

- Multiple units across country (National Account)
- 8 Years of Service

Contact: Tiffani Page

Email: Tiffani.s.page@chase.com

Phone: 407-771-0663

4. Years' Experience

Otis Elevator Company is the world's largest manufacturer and maintainer of people- moving products, including elevators, escalators and moving walkways. Otis is part of UTC Building & Industrial Systems, a unit of United Technologies Corp., a leading provider to the aerospace and building systems industries worldwide. Otis was founded in 1853 and has been in business for over 160 years. Otis has over 64,000 employees installing, maintaining, repairing and modernizing elevators in over 200 locations worldwide. There are approximately 2.5 million Otis elevators and escalators in operation worldwide. Otis currently maintains approximately 1.8 million elevators worldwide.

5. List of Employees for the University of Central Florida Account

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Account Manager: Charles Braziel

- BA Social Sciences 2003
- 2 years of account management with Otis

Service Superintendent: Brent Barzey

- 18 Years of elevator industry experience
- 8 years as an Elevator Mechanic with Otis
- 10 years as service superintendent with Otis

Branch Sales Manager: James Duda

- MBA 2007 (UCF) , BS Management 2005 (UCF)
- 8 years of elevator industry experience

General Manager: Kent Solberg

- 15 years of elevator industry experience with Otis
- Regional Sales Manager Southern Region
- General Manager Pensacola

Mechanic: Troy Barnes

Training:

- All OJT for Otis, Kone, ThyssenKrupp, Schindler, and MCE equipment
- Monthly safety training

Qualifications:

Troy has 24 years of experience testing, installing, maintaining, and repairing hydraulic and traction low, mid, and high rise, high speed elevators. Over the past 24 years he has also been a teacher for the International Union of Elevator Contractors Elevator School – leading and teaching mechanics and apprentices. Troy has also been a superintendent with Otis Elevator Company.

Mechanic: Mike Santagata

Training completed:

- All OJT for Otis, Kone, Thyssenkrupp, Schindler, and MCE equipment
- Monthly safety training

Qualifications:

Mike has 21 years of experience testing, installing, maintaining, and repairing hydraulic and traction low, mid, and high rise, high speed elevators. Over the past 19 years he has been a maintenance mechanic and has been a standby mechanic for two of the largest hospitals in Central Florida. His prior experiences include working at Orlando Regional Health's main campus as well as Florida Hospital South Campus.

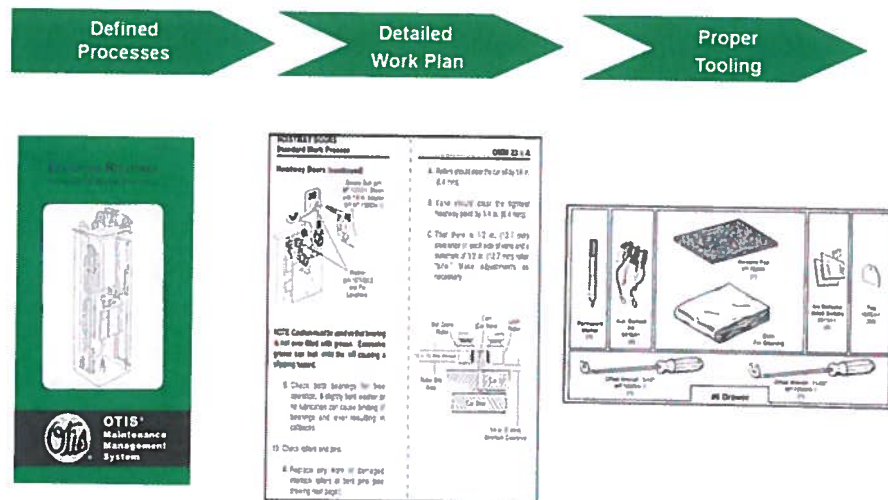
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6. Mechanic Training/Skill Set

Standard Work Processes

Otis knows that quality derives from consistency. Otis has developed the safest, most effective, and most efficient standard work processes (SWPs) for nearly every procedure needed for maintenance and repair of elevator equipment. All these SWPs are fully reviewed and tested prior to field implementation to ensure the best possible process.

Our technicians are trained in these procedures and given these SWPs for all their work so that each task performed is performed correctly, safely, with the proper tooling, and in the most efficient way possible to minimize risk, ensure quality, and deliver consistent reliability. If conditions require a change from the SWP or a technician has a better way of performing a task, a Job Hazard Analysis is performed and new job plan is developed with proper coordination to ensure that the end result is safe, correct, efficient work. Otis engineers and field operations are always looking to add quality or improve our SWPs to continue to deliver improved work to our customers in a safe manner.



Safety/Continuing Education

In an effort to promote safety and improve expertise, Otis requires each and every field technician, including all maintenance and service technicians to participate in weekly safety meetings. Each Otis field employee is required to attend and participate for a minimum of 15-minutes per week in tool box safety talks. This occurs for 52 weeks, employees are expected/required to execute each week even when they are on vacation. Thus they must total a minimum of 13 hours per year tool box talks. In addition to the weekly requirement, all Otis field employees must participate in 1-hour of mandatory safety training courses each month equaling a minimum of 12-hours additional safety training a year. Overall, Otis requires each field employee to attend, participate and complete minimum 25-hours per year of mandatory safety training.

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Please note Otis continually strives for excellence and requires all employees to acknowledge and participate when applicable complete the following:

- PFT Process – Performance Feedback Tool
 - (annual + 6 month reviews)
- Required ethics trainings on an annual basis
- Required Common Decency Training
- Required ACE Certifications
- Annual Affirmative Action Plans
- Equal Employment Opportunity (EEO) Policies
- Drug & Alcohol Policy
- Firearms Policy

Otis takes enormous pride in continually having the safest record in the elevator industry. We will not be satisfied until we are injury and incident free, and strive to drive safety through regular training, standard work processes, field audits, safety absolutes, communication, and discipline. At Otis, working safe is a condition of employment.

Otis can prove its best in the industry status through industry reporting through the elevator industry trade association National Elevator Industry, Inc (NEII).

The Otis safety program has been in existence since the late 1970's. Otis is number one in safety in the industry, and that can be attributed to our extensive dedication to ensure Otis employees are committed to the vision and values of safety, inside and outside the workplace.

All technicians have completed union requirements to progress from Helper to Mechanic, and receive continuous training:

- On-the-job
- Computer-based
- Classroom
- Interactive peer/supervisor
- Field Education Articles
- Technical Information Publications

All Otis field employees are required to complete mandatory safety training:

- Weekly safety jobsite talks

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- First Aid/CPR
- Fatality Prevention Audits
- Monthly safety training
- Safety Stand-down day
- Unannounced audits and inspections

Maintenance Capabilities for Non-Otis Equipment

Otis Elevator Company has the largest infrastructure to support our equipment in the industry. Due to this depth, you can be assured that Otis can expertly maintain, repair, and adjust all equipment associated with this RFQ. We have tremendous depth in our local offices, all having:

Competitor equipment being serviced by Otis technicians:

- Schindler
- Dover
- Elevator Controls (EC)
- Montgomery-Kone
- Motion Control Engineering (MCE)
- ThyssenKrupp/U.S. Elevator
- Westinghouse

Product Simulators

Otis has developed or purchased a huge array of simulators, software packages, and service tools to ensure that when we show up to a job, we have the tools, resources, and knowledge to do the job the right way, the first time.

Simulators

DMC
Swift Futura
Dover T-III / T-IV
Thyssen TAC 20 / 50
KONE Miprom
EPOCH
Miconic - A

Software Packages

MIPROM 21
DMC-1
MPH / 300A / EPOCH
MICONIC A
MP-1220 / MP-1230
ASCENSION 1000/2000
T-III/ T-IV

Hand Held Tools

Universal Prom Burner
MP-1200 / MP-1210 Portable Computer Display Board
MP-1220 / MP-1230 Portable Computer Display
Kone WG Door Operator Tool
GE DC-300 Drive Tool, MPH / 300A / EPOCH / MICONIC A
Thyssen TAC20/50

B. OVERALL RESPONSIVENESS OF PROPOSAL TO SATISFY SCOPE/PROJECT APPROACH

1. Understanding of Services

Otis Elevator understands that the university has entrusted our staff with sustaining the highest level of performance from the elevator equipment. We will provide a full time mechanic (140 hours monthly), dedicated to performing maintenance tasks and responding to service calls. Additionally, Otis will provide support 24/7 for after hour service calls and all emergencies. Otis Elevator Company offers a tightly coordinated and comprehensive service strategy that will result in providing you a consistent high level of service excellence that will exceed University expectations and requirements.

Otis Elevator Company acknowledges and will tailor the OMMS® maintenance program to match the requirements outlined in the specification for each piece of equipment at each independent site. Maintenance will be provided by Maintenance Control Programs (MCP's) for each project.

2. Roadmap for Success

Transition Plan

Upon award Otis will facilitate a kick-off meeting to formally introduce the entire Otis staff, as applicable, to each key stakeholder. We think it is very important to know who our customers are and for you to know who will be executing work for your project. Furthermore, Otis wants each level of service from our field to management to understand and physically see your projects. This ensures a smooth transition, and reduces overall customer inconvenience.

At this meeting the Account Manager, Technician, and Maintenance Supervisor will immediately begin developing an inventory of the existing equipment condition, necessary maintenance and/or repairs, code issue, and develop a report of typical replacement parts required. Otis will provide all contact information and spend as much time as necessary to assist University personnel regarding access, use and retrieval of electronic information via available Otis tracking systems.

Key Components to the Transition Plan

- Kick-off Meeting – immediately after contract award
- Share applicable contact information
- Training on Otis systems and procedures
- Training on the University systems and procedures
- Transition Walk-Through
- Adjuster Inspection Time – develop plan for adjuster time to address problem equipment immediately

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Quality Control Plan

For the University, elevators will be surveyed as necessary. Surveys consist of visual inspections, ride quality, and equipment performance. Results of the surveys will be communicated directly to the mechanic assigned to the job as well as to the customer, especially if items must be corrected with assistance from the building.

Key Components of the Quality Control Plan

- Mechanic Walk-Troughs (As applicable)
- Account Manager Audits (As applicable)
- Maintenance Supervisor Audits (As applicable)
- Consistent communication of findings to the University

Maintenance Control Program

Otis' Maintenance Control Program and our exclusive Otis Maintenance Management Program (OMMS ®) are based on years of extensive research, testing and adjusting. OMMS was developed by Otis after our sister company Pratt Whitney shared with us requirements and plans used to maintain jet engines. OMMS® is a comprehensive maintenance control system that delivers standard work process, a dynamic scheduling system, and closed loop documentation of completed work. OMMS® is based on the latest technology and industrial science research. This system delivers the proper maintenance and the proper time to deliver best in the industry elevator up time and the lowest service call rate in the industry.

OMMS also have the flexibility to implement a traditional, calendar based maintenance program with standard milestones, at the choice of our customers. However, customers who elect the usage based OMMS ® program receive the lowest callback rates in the industry 2.7 calls/unit/year. The industry average is over 4-5 calls/unit/year.

Through our improved scheduling technology, standard work process, and proper tooling, Otis can provide the right maintenance at the right time to reduce maintenance service interruptions and equipment failures.

Dynamic Scheduling

The schedule of maintenance and the procedures scheduled are determined through a combination of industrial science, customer requirements, and type of equipment, specific configuration of equipment, geography/environment, and maintenance team experience/expertise. This plan will be set up and in operation within 30 days of the contract start, and will be adjusted as needed.

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Static Inputs

The screenshot shows the 'Unit Specification' dialog box in Primavera P6. The 'Unit Specification' tab is active, displaying the following fields:

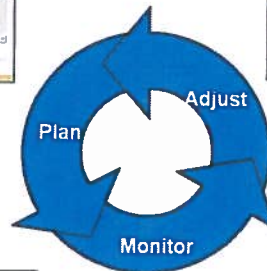
- Workline Name: Unit
- Building Number: 0000
- Column Number: 0000
- Row Number: 0000
- Grid Designation: F01
- Building Volume: 0.000000

The 'Product Information' tab is also visible, showing the following fields:

- Name: Unit
- Description: Unit
- Unit Volume: 0.000000

The 'Unit Volume' field in the 'Product Information' tab is highlighted with a red box.

Dynamic Inputs

[illegible]

Monthly Schedule

[illegible]

Work Accomplished

Priority Number : CVCN		ALBERTO, ALBERTO			
		01/25/2000 to 01/25/2004			
		Month to Date		b	% of Act Vls
Plan	Actual	Var	Act Vls Pts	Total Tasks	
Scheduled Buildings Exterior Vists	4	41	C	100	3
Total OBMS Miss s	39	52	C	34	5
Completed Scheduled Tasks	14	2	AE	27	24
Unscheduled Buildings Exterior Vists		5			
Completed Discretionary Tasks		5			5
On Schedule Completed Tasks		12			5
Total Tasks		23			10

Every elevator is unique - from its manufacturer to the environment in which it operates - there are thousands of variables that affect equipment reliability and safety. Otis designs a customer schedule of maintenance for each and every piece of equipment that we maintain, based on the latest industrial science on each component derived from thousands of tests by Otis engineers and field personnel. A field mechanic can't possibly keep all these variables in their mind, and Otis found that a great deal of time and effort was spent on low value maintenance tasks instead of high value maintenance tasks. With strictly based calendar maintenance, you don't receive these benefits and efficiencies, and much of the mechanics attention is spent determining what they should do, meaning less time for actual performance.

Otis automates the scheduling of tasks based on highly designed algorithms to deliver the most advanced maintenance program in the industry...and it works: Otis's service call rate at 2.7 calls/unit/year is the lowest in the industry, nearly half that of the industry average. Mechanics don't guess about what needs to be done. They perform standard routines according to their schedule, reducing interruptions for trouble calls, and in turn giving them even more time to perfect the performance of your equipment.

The technician's expertise is then focused on performing each task, and with their senses and attention focused on the task at hand they do what a process can't. If a technician hears, smells, feels, or sees something outside of the norm, they have the authority and responsibility to attend to it immediately – and the system immediately updates and changes the schedule, and reports the work accomplished to both the supervisor and customer for accountability and transparency.

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Hydraulic/Traction Elevators Maintenance Control Program

Some tasks will be specific to traction or hydraulic elevators

Typical Monthly Activities include – but can change based on initial survey and program adjustment.

- a. Perform general inspection of machinery sheaves worm and gear, motor, brake, selectors and floor controllers; lubricate as required.
- b. Empty drip pans; discard oil, in approved manner.
- c. Observe brake operation and adjust or repair if required.
- d. Inspect and lubricate machinery, contacts, linkage and gearing.
- e. Check and maintain fluid levels, monitor and repair leaks.
- f. Clean and inspect controllers, selectors, relay connections, etc.
- g. Ride car and observe operation of doors, leveling, reopening devices, push buttons, lights smoothness of ride, etc.
- h. Inspect governor working parts; clean and lubricate.
- i. Clean and lubricate signal drive mechanism when used.
- j. If rails are lubricated, check condition and lubrication.
- k. Check governor and tape tension sheave lubrication.
- l. Empty drip pans, clean pit, remove all rubbish, trash, oil, water, etc. from the pit.
- m. Inspect and test the telephone in each car.
- n. Replace all burned out lamps in elevator car, machine room, pit, hull lanterns, etc.
- o. Check brushes and commutators. Inspect commutators for finish, grooving, eccentricity and mica level. If required, clean, turn or refinish commutator to provide proper commutation.
- p. Inspect brushes for tension seating and wear, replace or adjust as required.
- q. Check door operation. Clean, lubricate and adjust brake, linkages, gear, motor, check keys, set screws, contracts, chain belts and cams.
- r. Check selector. Clean, adjust and lubricate brushes, dash pots, traveling cables, chain, pawl magnets, wiring contacts, relays, and tape drive.
- s. Check car. Clean, adjust and lubricate car door and gate tracks, pivots, hangers, cargrille, style channels, side and top exits.
- t. Inspect interiors of cab. Test telephone or intercommunication system, normal emergency lights, fan, emergency call system or alarm, car station. Make needed repairs that are part of this contract.
- u. Power Unit Examination & Maintenance. Examine power unit & components for leaks, wear or damage. Clean, lubricate adjust or renew components to ensure proper operation. Clean cabinet, verify ground, confirm seal on valve, secure covers. Empty oil drip containment. Check oil level, color and temperature. Adjust valve, pump, motor, belts, hoses or couplings as needed.
- v.
- w. Observe operation of signal and dispatching system. Inspect compensating hitches, buffers, rope clamps, slack cable switch, couplings, keyways, and pulleys. Check load weighing device and dispatching time settings. Clean, adjust and lubricate as necessary.
- x. Check oil level in car and counterweight oil buffers and add oil as required.
- y. Lubricate guide rails where applicable.
- z. Check controller contacts and relays. Visually inspect, check adjustment and replace contacts as required.

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- aa. Check and adjust: Car ventilation system; Car position indicators; Direct stations; Hall and car call buttons; Hall lanterns.
- bb. Visually inspect and clean governors.
- cc. Check leveling operation. Clean and adjust leveling switches, hoistway vanes, magnets and inductors. Repair or adjust for proper leveling.
- dd. On hoistway doors clean, lubricate, and adjust hangers, linkage gibs and interlocks.
- ee. Inspect all fastenings and ropes for wear and lubrication. Clean both governors and hoist ropes and lubricate hoist ropes if needed. Inspect all rope hitches and shackles and equalize rope tension.
- ff. Clean, adjust and lubricate car door or gate tracks, pivots, hangers, cargrille and still channels.
- gg. Inspect hoist reduction gear brake and brake drum, drive sheave and motor, and any bearing wear.
- hh. In the car, test alarm bell system. Clean light fixtures. Inspect, clean and adjust retiring cam device, chain, dash pots, commutators, brushes, and cam pivots fastenings. Test emergency switch (ground case if necessary). Inspect safety parts, pivots, set screws, switches, etc.
- ii. Check adjustment of car counterweight gibs, shoes or roller guides, lubricate and adjust, if necessary.
- jj. In the pit, lubricate compensating sheave and inspect hitches. Inspect governor and tape tension sheave fastenings. Empty and clean oil drip pans.
- kk. Clean all parts of safeties and lubricate moving parts to assure their proper operation. Check and adjust clearance between safety jaws and guide rails and visually inspect all safety parts.
- ll. Clean & examine governor rope, replace if needed.
- mm. Typical Annual Activities include – but can change based on initial survey and program adjustment.
- nn. Clean controllers with blower, check alignment of switches, relays, timers, hinge pins, etc., and adjust and lubricate. Check all resistance tubes and grids. Check oil and overload relays, settings and operation of overloads. Clean and inspect fuses and holders, and all controller connections.
- oo. Inspect sheaves to ensure they are tight on shafts. Check spokes and rim for cracks.
- pp. Examine all hoist ropes for wear, lubrication, length and tension. Replace, lubricate and adjust as required to meet code requirements.
- qq. In the hoist way, examine guide rails, cams, fastenings and counterweights. Inspect and test, limit and terminal switches.
- rr. Clean all overhead cans, sheaves, sills, bottom of platforms, car tops, counterweights and hoistway walls.
- ss. Check damping motor brushes and replace if needed.
- tt. Lubricate moving parts of vertical rising or collapsible car gates. Check pivot points, sheaves, guides and track for wear.
- uu. For bi-parting doors, clean chains, tracks and sheaves, lubricate as required. Check door contacts.
- vv. Remove, clean and lubricate break cores on brakes, clean linings, if necessary inspect for wear. Correct excess wear and adjust.
- ww. Inspect motor-generator and hoist motor armatures and rotor clearances. Check motor and MG set connection, and lubricate in accordance with manufacturer's instructions.
- xx. Thoroughly clean car and counterweight guide rails using a non-flammable or high flash point solvent to remove lint, dust, and excess lubricant.
- yy. Drain, flush and refill all oil reservoirs if needed.
- zz. Check and rest, if necessary, all brushes for neutral settings, proper quartering and spacing on commutators.
- aaa. Control system shall be checked out. The systems dispatching, scheduling an emergency service features shall be tested and adjusted in accordance with manufacturer's literature. The Service Provider shall prove to the satisfaction of the University or its representative that the system functions properly. All work shall be performed during other than normal working hours with no inconvenience to building occupancy. A full

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report covering adjustment time intervals, dispatch times on various programs, door standing time and door opening and closing speeds shall be provided.

bbb. Perform all annual tests required by ASME A.17.1 and A.17.2.

4. Vendor Resources and Facilities

Comprehensive Parts Inventory

The Otis Service Center (OSC) located in Bloomfield, CT stocks over 37,000 components for a total of \$17 million dollars in inventory. Otis Worldwide has over 150 Million in inventory of Otis and Non Otis equipment throughout 60 global and national parts centers. As an example, Otis has in stock over 2500 Westinghouse components that are no longer manufactured. Recently, we have enhanced our ordering systems to include all the original manufacturers part numbers to more easily allow our field force to order components. Otis holds purchasing relationships with all the major manufacturers and regularly works with them to obtain on hand stock. OSC stocks based on overall historical usage and procures the balance as needed. Obsolete components may be procured through third party vendors as available.

The Otis Service Center is home to our own microprocessor board repair center. While most elevator companies rely on outside vendors for microprocessor repairs, Otis successfully repairs obsolete and damaged boards at the Otis Service Center. This minimizes the time locating a third party to provide repair or replace boards that can be unavailable. This results in saving valuable time and increases up time of the elevator equipment.

OSC provides extended hours to accommodate overnight material orders for every region of the United States. Standard business hours from 7 am Eastern until 8 pm Pacific allows any Otis office in the continental United States to place overnight material orders. In addition to this service, OSC provides on call representatives that have access to obtaining parts after hours and on weekends for overnight shipments when the Service Center is closed. All of which provides our customers with prompt material deliveries to assure maximum operation time for their equipment.

Otis holds open, active accounts with most all independent or miscellaneous 3rd party suppliers. Please find a letter provided to Otis from one of the larger 3rd party suppliers indicating a solid relationship.

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Corporate Headquarters
11389 White Rock Road
Rancho Cordova, CA 95742-6522

916.463.9200 local
916.463.9201 fax
916.463.9382 international

To Whom It May Concern,

Otis Elevator Company is a valued MCE customer and is more than qualified to install, maintain and repair any and all of our products. Across the country Otis Elevator Company has and continues to demonstrate the knowledge, expertise and experience necessary to effectively service our products.

We look forward to growing and strengthening our relationship with Otis Elevator Company North America.

Respectfully

Orlando C. Turner

Otis NA spends >\$6M

Annually w/MCE

Otisline Call Center

Our 24x7 call center utilizes Otis employees to answer and dispatch every trouble call or emergency in the country. Otisline tracks responsiveness by logging every call from the time that the call is received to the time the mechanic arrives at the building to the time that issue has been resolved.

Otis Callback Reduction Center

Focused on identifying equipment that is not meeting equipment performance requirements. Identifying the correct support to resolve an issue is critical. That may include regional field engineering support or national engineering support.

Otis Remote On-Line Expert (ROLE)

Provides a quick and easy way for an Otis technician to receive help from an expert on a specific type of brand of equipment. It is essentially a network of experts available to support any field technician in any office, immediately, 24/7 to help troubleshoot and correct problems quickly and permanently. Otis has the ability to leverage our national capabilities at every property. Please note ROLE is not intended to reduce or inhibit local office capabilities, but rather enhance and assist as necessary.

Otis employs more resources to assist our local branches and field mechanics than any other provider. Why? Otis has more than 220,000 pieces of equipment, on more than 2,500 service routes, with more than 4,000 controller types, 500 varieties of elevator machines, and over 100 door operators. No one mechanic can be an expert on all this equipment, however, with the vast Remote On Line Engineers (ROLE), National and Regional



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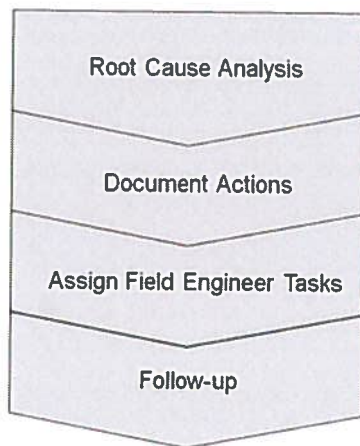
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Field engineers who can assist remotely or travel to any location, and extensive service parts engineers at the Otis Service Center in Farmington, Connecticut – every mechanic can ensure that their customers receive expert maintenance and support.

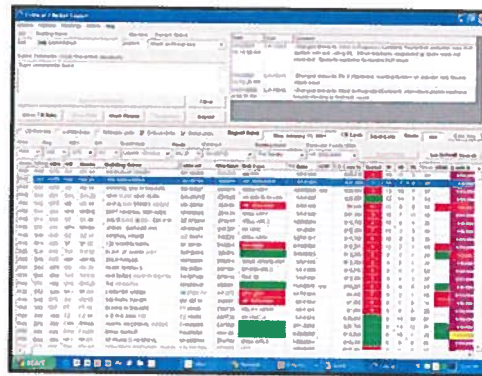
Otis Callback Reduction Tools

Finally, we have explained that Otis has the lowest service callback (trouble call) rate in the industry. Otis uses Callback Reduction, or CREX, to ensure the required resources are brought to equipment to permanently resolve issues. Weekly local office meetings are held with regional staff to ensure that problem units are identified, analyzed, and the proper resources are dedicated to permanently resolve those most problematic units quickly.

Regional Callback Meetings



CRex Application



3. Web Base Portal

e*Service

e*Service is a web-based tool that will give building managers the ability to monitor performance of any single piece of equipment to the entire equipment portfolio. Otis e*Service has tremendous functionality that will allow you to verify performance, run customized reports, and even place service calls. Otis believes in transparency. Our e*Service allows you to see when equipment is scheduled for service, when services was performed, uptime of a unit, shutdowns, repairs and allows for numerous charts and tables to show equipment performance. All this is available to you as our customer. Essentially we give our customers access to these tools so they can see and track our efforts.

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e*Service Mobile App

Otis offers the above features of e*Service in a convenient mobile app for iOS, Android, and Windows Phone operating systems.



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5. Sample Invoice

OTIS
One Farm Springs
Farmington, CT 06032

CUSTOMER NO.	DATE	INVOICE NO.
[REDACTED]	08/07/15	[REDACTED]

INVOICE

AMOUNT DUE
[REDACTED]

MAIL PAYMENT TO: OTIS ELEVATOR COMPANY
P.O. BOX 73579
CHICAGO, IL 60673-5799

PLEASE SEND
CHECK/PAID
TO YOUR
LOCAL OFFICE OR
STAMP HERE

ENCLOSE THIS COUPON WITH YOUR PAYMENT
MAKE CHECK PAYABLE TO: OTIS ELEVATOR COMPANY

INVOICE

DETACH RETURN ENCLOSED ALONG PERFORATION
OTIS ELEVATOR COMPANY
** INVOICE CHARGES **

BUILDING REFERENCE	CUSTOMER NO.	DATE	INVOICE NO.
FLORIDA HOSPITAL 601 E. ROLLINS ORLANDO 32803	[REDACTED]	[REDACTED]	[REDACTED]

DATE OF SERVICE: [REDACTED]

CALLER: [REDACTED]
MACHINE: D44034, RE-WIND RIV D IS STUCK ON GROUND
FLOOR, DOORS OFF TRACK
WORK PERFORMED: REPAIRED DOOR/CABLE WITH OFF TRACK

SUBTOTAL	[REDACTED]
TAX	.00
FREIGHT	.00
TOTAL AMOUNT DUE	[REDACTED]

ANY QUESTIONS CONCERNING THIS INVOICE, CONTACT OTIS
OR WRITE OTIS ELEVATOR 55 W. PINELOCH AVE. ORLANDO, FL 32806 AT: (807-438-3633)

WE CERTIFY THAT OURS WORKS PROVIDED IN COMPLIANCE WITH ALL APPLICABLE REGULATORY REQUIREMENTS OF SECTIONS 6, 7 AND 12 OF THE PUBLIC ACCOUNTING ACT, AS AMENDED, AND OF REGULATIONS AND ORDERS OF THE UNITED STATES DEPARTMENT OF LABOR, UNDER THE PROVISIONS OF SECTION 14 HEREIN. CASH/STAMP PAYMENTS SHALL BEAR AN INTEREST CHARGE TO THE ISSUING AMOUNT CALCULATED FROM THE PAYMENT DUE DATE OF THE INVOICE AT THE RATE OF ONE AND ONE HALF PERCENT (1 1/2%) PER MONTH OF THE MAXIMUM RATE ALLOWED BY APPLICABLE LAW, WHICHEVER IS LESS.

C. OVERALL PRICING

1. Appendix B
2. Appendix C

We are very excited about the opportunity to work with you and look forward to meeting to further discuss our proposal and how Otis' exclusive techniques and procedures will improve, protect and extend the useful life of your vertical transportation equipment.



Information included herein is for the University use only and shall not be distributed without permission from Otis Elevator

APPENDIX B - ELEVATOR FEE SCHEDULE
FISCAL YEAR (JULY 2015 - JUNE 2016)

Building Name	Building Number	Elevator Number	Elevator Serial Number	Type	Building Type	Campus	Unit Price	Months of Service	Total Annual Cost
MAIN CAMPUS									
Millican Hall	0001	1	07758	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
John C. Hitt Library	0002	1	04761	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	04762	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		3	04763	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		4	04764	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		5	33687	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Chemistry Building	0005	1	04764	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Mathematical Sciences Building	0012	1	08467	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	08469	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Technology Commons I	0013	1	08468	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Howard Phillips Hall	0014	1	07433	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Colbourn Hall	0018	1	11488	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	38787	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Biological Sciences Building	0020	1	20856	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	61627	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Education Complex & Gym	0021	1	24041	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Technology Commons II	0029	1	31496	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Brevard Hall	0030	1	31467	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Orange Hall	0031	1	31466	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Seminole Hall	0032	1	31468	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Engineering I	0040	1	35886	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	35887	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Business Administration I	0045	1	41357	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	41359	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		3	41360	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
UCF Arena	0050	1	44961	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		2	90387	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		3	90388	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		4	90389	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		5	90458	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Visual Arts Building	0051	1	45488	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	45489	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Student Union	0052	1	48106	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		2	48107	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		3	48108	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		4	48109	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
CREOL Building	0053	1	47645	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	47646	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		3	90468	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
College of Sciences Building	0054	1	50441	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	51273	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Nicholson School of	0075	1	53982	Wheelchair Lift	E&G	Main	\$ 84.00	12	\$ 1,008.00

**APPENDIX B - ELEVATOR FEE SCHEDULE
FISCAL YEAR (JULY 2015 - JUNE 2016)**

Building Name	Building Number	Elevator Number	Elevator Serial Number	Type	Building Type	Campus	Unit Price	Months of Service	Total Annual Cost
Communication	0075	2	54116	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		3	54117	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Classroom Building I	0079	1	56364	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	56365	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Health & Public Affairs I	0080	1	54759	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	54760	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		3	54761	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Sumpter Hall	0084	1	54615	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Citrus Hall	0085	1	54617	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Flagler Hall	0086	1	54616	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Recreation & Wellness Center	0088	1	60015	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		2	60016	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		3	97833	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Health & Public Affairs II	0090	1	59422	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	60008	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Engineering II	0091	1	59114	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	59115	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Teaching Academy	0093	1	62382	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	62383	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Business Administration II	0094	1	62564	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Classroom Building II	0098	1	100113	Traction	E&G	Main	\$ 285.00	12	\$ 3,420.00
		2	100114	Traction	E&G	Main	\$ 285.00	12	\$ 3,420.00
Psychology	0099	1	90393	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	90394	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Nike Building 101	0101	1	59478	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Nike Building 102	0102	1	59479	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Nike Building 103	0103	1	59480	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Nike Building 104	0104	1	59484	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Nike Building 106	0106	1	59485	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Hercules Building 108	0108	1	59481	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Hercules Building 109	0109	1	59482	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Hercules Building 110	0110	1	59483	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Hercules Building 111	0111	1	59487	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Hercules Building 113	0113	1	59486	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Harris Cororation Engineering Center	0116	1	86236	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	86237	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Performing Arts Center	0119	1	97704	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	97705	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Physical Sciences Building	0121	1	95316	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		2	95318	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		3	97827	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
		4	97828	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Morgridge International Reading Center	0122	1	98538	Traction	E&G	Main	\$ 285.00	12	\$ 3,420.00
Softball Stadium	0125	1	90395	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00

**APPENDIX B - ELEVATOR FEE SCHEDULE
FISCAL YEAR (JULY 2015 - JUNE 2016)**

Building Name	Building Number	Elevator Number	Elevator Serial Number	Type	Building Type	Campus	Unit Price	Months of Service	Total Annual Cost
Fairwinds Alumni Center	0126	1	87741	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Health Center	0127	1	88117	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		2	88118	Dumbwaiter	AUX	Main	\$ 84.00	12	\$ 1,008.00
UCF Bright House Network Stadium	0135	1	92044	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		2	92045	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		3	92046	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		4	92047	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		5	93831	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Career Services & Experiential Learning	0140	1	98218	Traction	E&G	Main	\$ 285.00	12	\$ 3,420.00
		2	98220	Traction	E&G	Main	\$ 285.00	12	\$ 3,420.00
Track / Soccer Stadium	0142	2	98781	Wheelchair Lift	AUX	Main	\$ 84.00	12	\$ 1,008.00
Parking Garage A	0147	1	90469	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
		2	90470	Hydraulic	AUX	Main	\$ 145.00	12	\$ 1,740.00
Public Safety Building	0150	1	97834	Hydraulic	E&G	Main	\$ 145.00	12	\$ 1,740.00
Park Garage H	0151	1	98345	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		2	98346	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
Neptune Building 156	0156	1	100241	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		2	100242	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
Neptune Building 157	0157	1	100243	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		2	100244	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
Neptune Building 158	0158	1	100245	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		2	100246	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
Libra Garage	0160	1	100260	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		1	100261	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
Partnership I	8111	1	60212	Hydraulic	E&G	Reseach	\$ 145.00	12	\$ 1,740.00
		2	60213	Hydraulic	E&G	Reseach	\$ 145.00	12	\$ 1,740.00
Partnership II	8119	1	84555	Traction	E&G	Reseach	\$ 285.00	12	\$ 3,420.00
		2	84556	Traction	E&G	Reseach	\$ 285.00	12	\$ 3,420.00
Partnership III	8126	1	97825	Traction	E&G	Reseach	\$ 285.00	12	\$ 3,420.00
		2	97826	Traction	E&G	Reseach	\$ 285.00	12	\$ 3,420.00
				TOTAL COST FOR ANNUAL SERVICE (MAIN CAMPUS):					\$ 238,284.00

ADMIN HOUSING									
Chi Omega	0416	1	100031	Wheelchair Lift	AUX	Main	\$ 84.00	12	\$ 1,008.00
Kappa Kappa Gamma	0417	1	100032	Wheelchair Lift	AUX	Main	\$ 84.00	12	\$ 1,008.00
TOTAL COST FOR ANNUAL SERVICE (ADMIN HOUSING):									\$ 2,016.00

NORTHVIEW HOUSING									
Northview	8136	1	99901	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		2	99902	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		3	99964	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00
		4	99978	Traction	AUX	Main	\$ 285.00	12	\$ 3,420.00

APPENDIX B - ELEVATOR FEE SCHEDULE

FISCAL YEAR (JULY 2015 - JUNE 2016)

Building Name	Building Number	Elevator Number	Elevator Serial Number	Type	Building Type	Campus	Unit Price	Months of Service	Total Annual Cost
TOTAL COST FOR ANNUAL SERVICE (NORTHVIEW HOUSING):									\$ 13,680.00

UCF EXECUTIVE DEVELOPMENT CENTER - DOWNTOWN

Downtown Academic Center	0902	1	50991	Hydraulic	E&G	Downtown	\$ 145.00	12	\$ 1,740.00
TOTAL COST FOR ANNUAL SERVICE (DOWNTOWN):							\$ 1,740.00		

UCF SCHOOL OF FILM AND DIGITAL MEDIA - EXPO

Expo Center	0906	1	32472	Hydraulic	E&G	Downtown	12	\$ 1,740.00
		2	32473	Hydraulic	E&G	Downtown	12	\$ 1,740.00
		TOTAL COST FOR ANNUAL SERVICE (EXPO):						\$ 3,480.00

UCF LAKE NONA COLLEGE OF MEDICINE

Burnett Biomedical Sciences	1001	1	94261	Traction	E&G	Lake Nona	\$ 285.00	12	\$ 3,420.00
		2	94262	Traction	E&G	Lake Nona	\$ 285.00	12	\$ 3,420.00
College of Medicine	1002	1	96868	Traction	E&G	Lake Nona	\$ 285.00	12	\$ 3,420.00
		2	96869	Traction	E&G	Lake Nona	\$ 285.00	12	\$ 3,420.00
		3	96870	Traction	E&G	Lake Nona	\$ 285.00	12	\$ 3,420.00
				TOTAL COST FOR ANNUAL SERVICE (LAKE NONA):					\$ 17,100.00

FISCAL YEAR (JULY 2015 - JUNE 2016)

Building Name	Building Number	Elevator Number	Elevator Serial Number	Type	Building Type	Campus	Unit Price	Months of Service	Total Annual Cost
UCF ROSEN SCHOOL OF HOSPITALITY									
Rosen School College	0903	1	73190	Hydraulic	E&G	Rosen	\$ 145.00	12	\$ 1,740.00
		2	73191	Hydraulic	E&G	Rosen	\$ 145.00	12	\$ 1,740.00
Rosen School - Housing I	0904	1	87445	Hydraulic	E&G	Rosen	\$ 145.00	12	\$ 1,740.00
Rosen School - Housing II	0905	1	87444	Hydraulic	E&G	Rosen	\$ 145.00	12	\$ 1,740.00
				TOTAL COST FOR ANNUAL SERVICE (ROSEN):					\$ 6,960.00

UCF FLORIDA SOLAR ENERGY CENTER - COCOA										
F.S.E.C	2001	1	49220	Hydraulic	E&G	Cocoa	\$	144.00	12	\$ 1,739.00
				TOTAL COST FOR ANNUAL SERVICE (F.S.E.C):						\$ 1,739.00

TOTAL COST FOR ANNUAL SERVICE (ALL BLDGS):	\$	284,449.00
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APPENDIX C

LABOR RATES AND PARTS MARKUP

You are invited to Bid on the following:

Agreement for Elevator Maintenance / Repair Services

Item No.	Quantity	Unit	Description	Unit Price	Total
			<p>The Bidder, having visited the site of the proposed project and familiarized himself/herself with the local conditions, nature, and extent of the work, and having examined carefully the specifications included and Terms and Conditions herein, proposes to furnish all labor, materials, equipment and other items, without exception for the proper execution and completion of the contract and, if awarded the contract, to complete the said work within time limits as specified for the following bid prices.</p> <p style="text-align: center;"><u>Repair / Request Work</u></p>		
1	48	Hours	Stand-by for Football Games (Games are played on weekend or during the week)	\$ <u>348.00</u>	\$ <u>16,704.00</u>
2	32	Hours	Stand-by for Housing Move-ins (Twice a year, typically Saturdays and Sundays)	\$ <u>348.00</u>	\$ <u>11,136.00</u>
3	120	Hours	Repairs Services - One Elevator Tech – Normal Hours	\$ <u>205.00</u>	\$ <u>24,600.00</u>
4	80	Hours	Repairs Services – One Elevator Tech and Helper – Normal Hours	\$ <u>369.00</u>	\$ <u>29,520.00</u>
5	60	Hours	Repairs Services - One Elevator Tech – Off Normal Hours	\$ <u>348.00</u>	\$ <u>20,880.00</u>
6	40	Hours	Repairs Services – One Elevator Tech and Helper – Normal Hours	\$ <u>626.00</u>	\$ <u>25,040.00</u>
			<u>Parts and Materials Costs</u>		
7	\$2000	Percentage	Materials Mark-Up <\$1,000	<u>25%</u>	\$ <u>2,500</u>
8	\$2000	Percentage	Materials Mark-Up >\$1,000	<u>25%</u>	\$ <u>2,000</u>
			<u>Monthly Services</u>		
9	12	Month	Total Monthly Services	\$ <u>23,749.00</u>	\$ <u>284,988.00</u>

TOTAL BID (this page) \$ 417,368.00

Vendor Initials

A handwritten signature in blue ink, consisting of several loops and a long horizontal stroke at the end.

SUBMIT OFFER TO: PURCHASING DEPARTMENT UNIVERSITY OF CENTRAL FLORIDA 12479 RESEARCH PARKWAY, BLDG. 600 ORLANDO, FL 32826 Phone: (407) 823-2661 – Fax (407) 823-5551 www.purchasing.ucf.edu		University of Central Florida INVITATION TO NEGOTIATE Contractual Services Acknowledgement Form	
Page 1 of 62 Pages		OFFERS WILL BE OPENED: AUGUST 20, 2015 at 2:00 p.m.	
		and may not be withdrawn within 120 days after such date and time.	
UNIVERSITY MAILING DATE: July 9, 2015		ITN TITLE: ELEVATOR MAINTENANCE SERVICES	
FEDERAL EMPLOYER IDENTIFICATION NUMBER OR S.S. NUMBER 13-5583389			
VENDOR NAME Otis Elevator Company		REASON FOR NO OFFER	
VENDOR MAILING ADDRESS 55 W Pineloch Ave			
CITY - STATE - ZIP CODE Orlando, FL 32806			
AREA CODE 407	TELEPHONE NO. 438-3633	POSTING OF PROPOSAL TABULATIONS Proposal tabulations with intended award(s) will be posted for review by interested parties at the Purchasing Department and our solicitation web page and will remain posted for a period of 72 hours. Failure to timely file a protest or failure to timely deliver the required bond or other security in accordance with the Board of Governors' Regulations 18.002 and 18.003 shall constitute a waiver of protest proceedings.	
	TOLL FREE NO.		
	FAX NO. 860-66-7251		

Government Classifications
Check all applicable

- | | |
|--|---|
| <input type="checkbox"/> African American | <input type="checkbox"/> American Women |
| <input type="checkbox"/> Asian-Hawaiian | <input type="checkbox"/> Government Agency |
| <input type="checkbox"/> Hispanic | <input type="checkbox"/> MBE Federal |
| <input type="checkbox"/> Native American | <input type="checkbox"/> Non-Minority |
| <input type="checkbox"/> Non-Profit Organization | <input type="checkbox"/> Pride |
| <input type="checkbox"/> Small Business Federal | <input type="checkbox"/> Small Business State |

I certify that this offer is made without prior understanding, agreement, or connection with any corporation, firm or person submitting an offer for the same materials, supplies, or equipment and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this offer and certify that I am authorized to sign this offer for the vendor and that the vendor is in compliance with all requirements of the Invitation To Negotiate, including but not limited to, certification requirements. In submitting an offer to an agency for the State of Florida, the vendor offers and agrees that if the offer is accepted, the vendor will convey, sell, assign or transfer to the State of Florida all rights, title and interest in and to all causes of action it may now or hereafter acquire under the Anti-trust laws of the United States and the State of Florida for price fixing relating to the particular commodities or services purchased or acquired by the state of Florida. At the State's discretion, such assignment shall be made and become effective at the time the purchasing agency tenders final payment to the vendor.

GENERAL CONDITIONS

1. **SEALED OFFERS:** All offer sheets and this form must be executed and submitted in a sealed envelope. (DO NOT INCLUDE MORE THAN ONE OFFER PER ENVELOPE.) The face of the envelope should contain, in addition to the above address, the date, and time of the solicitation opening and the solicitation number. Offer prices not submitted on any attached price sheets when required shall be rejected. All offers are subject to the terms and conditions specified herein. Those which do not comply with these terms and conditions are either automatically rejected with respect to non-compliance with non-negotiable terms and conditions or may be rejected, at UCF's sole discretion, with respect to any other terms and conditions.
2. **EXECUTION OF OFFERS:** Offers must contain a manual signature of the representative authorized to legally bind the Respondent to the provisions herein. Offers must be typed or printed in ink. Use of erasable ink is not permitted. All corrections to prices made by vendor are to be initialed.
3. **NO OFFER SUBMITTED:** If not submitting an offer, respond by returning only this offer acknowledgment form, marking it "NO OFFER," and explain the reason in the space provided above. Failure to respond without justification may be cause for removal of the company's name from the solicitation mailing list. **NOTE:** To qualify as a respondent, vendor must submit a "NO OFFER," and it must be received no later than the stated offer opening date and hour.


AUTHORIZED SIGNATURE (MANUAL)

Kent Solberg, General Manager
AUTHORIZED SIGNATURE (TYPED), TITLE

4. PRICES, TERMS AND PAYMENT: Firm prices shall be negotiated and include all services rendered to the purchaser.

(a) DISCOUNTS: Cash discount for prompt payment shall not be considered in determining the lowest net cost for offer evaluation purposes.

(b) MISTAKES: Offerers are expected to examine the conditions, scope of work, offer prices, extensions, and all instructions pertaining to the services involved. Failure to do so will be at the offerer's risk.

(c) INVOICING AND PAYMENT: All vendors must have on file a properly executed W-9 form with their Federal Employer Identification Number prior to payment processing.

Vendors shall submit properly certified original invoices to:

Finance & Accounting
12424 Research Parkway, Suite 300
Orlando, Florida 32726-3249

Invoices for payment shall be submitted in sufficient detail for a proper pre-audit and post audit. Prices on the invoices shall be in accordance with the price stipulated in the contract at the time the order is placed. Invoices shall reference the applicable contract and/or purchase order numbers. Invoices for any travel expenses shall be submitted in accordance with the State of Florida travel rates at or below those specified in Section 112.061, Florida Statutes and applicable UCF policies. Travel Reimbursement must be made using the UCF Voucher for Reimbursement of Traveling Expenses available on the web at <http://www.fa.ucf.edu/forms/forms.cfm#>.

Final payment shall not be made until after the contract is complete unless the University has agreed otherwise.

Interest Penalties: Vendor interest penalty payment requests will be reviewed by the UCF ombudsman whose decision will be final.

Vendor Ombudsman: A vendor ombudsman position has been established within the Division of Finance & Accounting. It is the duty of this individual to act as an advocate for vendors who may be experiencing problems in obtaining timely payments(s) from the University of Central Florida. The Vendor Ombudsman can be contacted at (407) 882-1040; or by mail at the address in paragraph 4, (c) above.

The ombudsman shall review the circumstances surrounding non-payment to:

- determine if an interest payment amount is due;
- calculate the amount of the payment; and
- ensure timely processing and submission of the payment request in accordance with University policy.

APPENDIX I
EVALUATION SCORING SHEET

NAME OF RESPONDENT COMPANY: Otis Elevator Company

INSTRUCTIONS TO EVALUATION COMMITTEE MEMBER:

1. Evaluate each offer on a separate form.
2. Work independently and do not discuss the Offers or your evaluation with anyone.
3. When the forms are completed, sign, date and deliver them in a **sealed envelope** to the **Purchasing Representative** named in section 2.1.

SAMPLE

Evaluation Factors	Max Points	Points Awarded
1. EXPERIENCE AND QUALIFICATIONS OF PROPOSER AND PROJECT STAFF	30	
2. OVERALL RESPONSIVENESS OF PROPOSAL TO SATISFY SCOPE/ PROJECT APPROACH	35	
3. OVERALL PRICING	25	
4. CONFORMANCE TO ITN'S PREFERRED CONDITIONS AND REQUIREMENTS (FAILURE TO CONFORM TO ITN'S MANDATORY CONDITIONS AND REQUIREMENTS MAY RESULT IN REJECTION OF PROPOSAL) Section 2.0	10	
Total Points:	100	
Comments, if any:		
Evaluation points do not have to equal 100. Total points can vary depending upon customers' desires.		















EVALUATOR'S NAME: _____







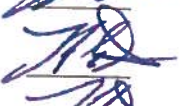

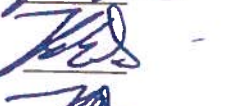









EVALUATOR'S SIGNATURE: _____

















DATE: _____

APPENDIX II SUPPLEMENTAL OFFER SHEET TERMS AND CONDITIONS

The sections set forth below are to each be initialed, as YES for "understood and agreed upon" or NO for "not agreed to." Failure to complete and return this document with your offer could result in rejection of your offer, at UCF's sole discretion. Respondents shall not check sections as "understood and agreed upon" with the intent to negotiate a change to those sections/terms and conditions after tentative award of a contract resulting from this ITN. Respondents disagreeing with any term or condition of this ITN are to act to resolve the difference prior to the deadline for inquiries, as noted in this ITN. A Respondent's disagreement with any non-negotiable section of this ITN shall be automatically rejected. Failure of the university and the tentative awardee to come to an agreement with respect to terms and conditions within a time frame UCF determines to be reasonable constitutes grounds for rejection of that offer and the University shall have the right, at its sole discretion, to award the contract to the next favorable respondent.

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>RESPONDENT INITIALS</u>
2.1 **Non-negotiable**	<u>x</u>	<u> </u>	
2.2 **Non-negotiable**	<u>x</u>	<u> </u>	
2.3 **Non-negotiable**	<u>x</u>	<u> </u>	
2.4	<u>x</u>	<u> </u>	
2.5	<u>x</u>	<u> </u>	
2.6 **Non-negotiable**	<u>x</u>	<u> </u>	
2.7 Section Not Used			
2.8 **Non-negotiable**	<u>x</u>	<u> </u>	
2.9	<u>x</u>	<u> </u>	
2.10	<u>x</u>	<u> </u>	
2.11 **Non-negotiable**	<u>x</u>	<u> </u>	
2.12	<u>x</u>	<u> </u>	
2.13 **Non-negotiable**	<u>x</u>	<u> </u>	
2.14 **Non-negotiable**	<u>x</u>	<u> </u>	
2.15	<u>x</u>	<u> </u>	

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>RESPONDENT INITIALS</u>
2.16	<u>x</u>	<u> </u>	
2.17	<u>x</u>	<u> </u>	
2.18 **Non-negotiable**	<u>x</u>	<u> </u>	
2.19	<u>x</u>	<u> </u>	
2.20 **Non-negotiable**	<u>x</u>	<u> </u>	
2.21	<u>x</u>	<u> </u>	
2.22	<u>x</u>	<u> </u>	
2.23	<u>x</u>	<u> </u>	
2.24	<u>x</u>	<u> </u>	
2.25	<u>x</u>	<u> </u>	
2.26	<u>x</u>	<u> </u>	
2.27 **Non-negotiable**	<u>x</u>	<u> </u>	
2.28 **Non-negotiable**	<u>x</u>	<u> </u>	
2.29	<u>x</u>	<u> </u>	
2.30 **Non-negotiable**	<u>x</u>	<u> </u>	
2.31 **Non-negotiable**	<u>x</u>	<u> </u>	
2.32	<u>x</u>	<u> </u>	
2.33	<u>x</u>	<u> </u>	
2.34	<u>x</u>	<u> </u>	
2.35 **Non-negotiable**	<u>x</u>	<u> </u>	
2.36	<u>x</u>	<u> </u>	
2.37	<u>x</u>	<u> </u>	
2.38	<u>x</u>	<u> </u>	

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>RESPONDENT INITIALS</u>
2.39**Non-negotiable**	<u>x</u>	<u> </u>	
2.40	<u>x</u>	<u> </u>	
2.41	<u>x</u>	<u> </u>	
2.42**Non-negotiable**	<u>x</u>	<u> </u>	
2.43	<u>x</u>	<u> </u>	
2.44	<u>x</u>	<u> </u>	
2.45	<u>x</u>	<u> </u>	
2.46	<u>x</u>	<u> </u>	
2.47	<u>x</u>	<u> </u>	
2.48	<u>x</u>	<u> </u>	
2.49 **Non-negotiable**	<u>x</u>	<u> </u>	
2.50	<u>x</u>	<u> </u>	
2.51	<u>x</u>	<u> </u>	
2.52 **Non-negotiable**	<u>x</u>	<u> </u>	
3.0	<u>x</u>	<u> </u>	
4.0	<u>x</u>	<u> </u>	

RESPONDENT COMPANY NAME: Otis Elevator Company

AUTHORIZED SIGNATURE: 

TITLE: Kent Solberg
General Manager

DATE: 8/20/15

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES SUBPART - CONTRACTOR'S AGREEMENTS

SEC. 202. Except in contracts exempted in accordance with Section 204 of this Order, all Government contracting agencies shall include in every Government contract hereafter entered into the following provisions:

During the performance of this contract, the contractor agrees as follows:

- (1) The contractor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.
- (2) The contractor will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex or national origin.
- (3) The contractor will send to each labor union or representative of workers with which the contractor has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer, advising the labor union or worker's representative of the contractor's commitments under Section 202 of Executive Order No. 11246 of September 24, 1965, and shall post copies of notice in conspicuous places available to employees and applicants for employment.
- (4) The contractor will comply with all provisions of Executive Order No. 11246 of September 24, 1965 and of the rules, regulations, and relevant orders of the Secretary of Labor.
- (5) The contractor will furnish all information and reports required by Executive Order No. 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations and orders.
- (6) In the event of the contractor's noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order No. 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoiced as provided in Executive Order No. 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.
- (7) The contractor will include the provision of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order No. 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The contractor will take such action with respect to any subcontract or purchase orders the contracting agency may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, however, that in the event the contractor becomes involved in, or is threatened

APPENDIX III

CERTIFICATE OF NON-SEGREGATED FACILITIES

We, Otis Elevator Company certify to the University of Central Florida that we do not and will not maintain or provide for our employees any segregated facilities at any of our establishments, and that we do not and will not permit our employees to perform their services, under our control, where segregated facilities are maintained. We understand and agree that a breach of this certification is a violation of the Equal Opportunity clause required by Executive order 11246, amended.

As used in this certification, the term "segregated facilities" means any waiting rooms, work areas, rest rooms and wash room, restaurants and other eating areas, time clocks, locker rooms and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, creed, color or national origin, because of habit, local custom or otherwise.

We, further, agree that (except where we have obtained identical certifications from offered subcontractors for specific time periods) we will obtain identical certifications from offered subcontractors prior to the award of subcontracts exceeding \$10,000 which are not exempt from the provisions of the Equal Opportunity Clause; that we will retain such certification in our files; and that we will forward the following notice to such offered subcontractors (except where the offered subcontractors have submitted certifications for specific time periods):

NOTE TO PROSPECTIVE SUBCONTRACTORS OR REQUIREMENTS FOR CERTIFICATIONS OF NON-SEGREGATED FACILITIES. A Certificate of Non-segregated Facilities, as required by the 9 May 1967 order on Elimination of Segregated Facilities, by the Secretary of Labor (32 Fed. Reg. 7439, 19 May 1967), must be submitted prior to the award of a sub-contract exceeding \$10,000 which is not exempt from the provisions of the Equal Opportunity clause. The certification may be submitted either for each sub-contract or for all subcontracts during a period (i.e. quarterly, semiannually, or annually).

The Contractor and subcontractors shall abide by the requirements of 41 CFR, Section 60-1.4(a), 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, national origin, protected veteran status or disability.

NOTE: Whoever knowingly and willfully makes any false, fictitious, or fraudulent representation may be liable to criminal prosecution under 18 U.S.C. 1001.

with, litigation with a subcontractor or vendor as a result of such direction by the contracting agency, the contractor may request the United States to enter into such litigation to protect the interest of the United States.

SEC. 402 Affirmative Action for Disabled Veterans and Veterans of the Vietnam Era:

- (1) The contractor agrees to comply with the affirmative action clause and regulation published by the US Department of Labor implementing Section 402 of the Vietnam Era Veteran's Readjustment Assistance Act of 1974, as amended, and Executive Order 11701, which are incorporated in this certificate by reference.

RESPONDENT COMPANY NAME: Otis Elevator Company

AUTHORIZED SIGNATURE: 

Kent Solberg

TITLE: General Manager

General Manager

DATE: 8/20/15

8/20/15

APPENDIX IV
COMPLIANCE AND
CERTIFICATION OF GOOD STANDINGS

The parties shall at all times comply with all applicable ordinances, laws, rules and regulations of local, state and federal governments, or any political subdivision or agency, or authority or commission thereof, which may have jurisdiction to pass laws, ordinances, or make and enforce rules and regulations with respect to the parties.

Vendors shall certify below that they are in good standings to conduct business in the State of Florida. **The awardee of any contract resulting from this solicitation shall forward a certification of good standing.** The certifications must be submitted to the UCF Purchasing Department prior to providing any goods or services required under the resulting contract. Noncompliance with this provision may constitute rejection of proposal or termination of a contract at UCF's sole discretion.

CERTIFICATION

I certify that the company submitting an offer under this solicitation is in compliance with all applicable laws to conduct business in the State of Florida, is in good standings and will provide a certificate of good standings from the State of residence prior to initiating any performance under any contract resulting from this solicitation.

Company: Otis Elevator Company

Authorized Representative's Name: Kent Solberg

Authorized Representative's Signature: _____

Date: 8/20/15



Purchasing Department

ADDENDUM

IMPORTANT DOCUMENT – INVITATION TO BID ADDENDUM

ITB NUMBER: 1435MSA OPENING DATE & TIME: August 20, 2015 @ 2:00PM

ITB TITLE: ELEVATOR MAINTENANCE SERVICES

ADDENDUM NUMBER: 1 ADDENDUM DATE: August 6, 2015

Purpose of the addendum is to provide answers to questions asked during the open question period (BELOW).

Some of the answers may refer back to pages in the bid doc. For reference, interested parties can obtain a copy of the bid document at the following web address, if you haven't already.
<http://www.purchasing.ucf.edu/bids/index.asp>

PLEASE ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND RETURN IT WITH YOUR BID. FAILURE TO SIGN AND RETURN WITH YOUR BID COULD RESULT IN REJECTION OF YOUR BID.

A handwritten signature in blue ink, appearing to read "Kent Solberg", written over a horizontal line.

PROPOSERS SIGNATURE

Kent Solberg
PRINT OR TYPE PROPOSER'S NAME

Otis Elevator Company
COMPANY NAME

kent.solberg@otis.com
EMAIL ADDRESS