



## OWNER'S PROJECT REQUIREMENTS

FOR:

### Forest Rose School HVAC Improvements 2026

May 1, 2026

Prepared By:



*dba Palmer Conservation Consulting, LLC*

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Columbus, Ohio 43215

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# Owner's Project Requirements (OPR)

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May 1, 2026

Project:

### **Fairfield County Board of Developmental Disabilities: Forest Rose School HVAC Improvements 2026 Project**

739 College Avenue, Lancaster, Ohio 43130

OPR Documents Distributed/posted (over several transmissions) as exhibits to final DB Contract(s):

- I. Cover Sheet – Forest Rose HVAC Improvements 2026**
- II. Pre-Proposal Meeting Documents – Prepare Proposers for Delivery of Qualified Proposals**
- III. General Information – ITB/Front-End Specifications & Bid Form(s) – by Fairfield County**
- IV. Specifications Portion**
  - a. Performance Specification Criteria
    - i. 102326 – Overall Specifications
- V. Drawings Portion of HVAC Renovations – Schematic Not-to-Scale**
  - a. Title/Details & Floor Plans –Electrical Base & ALT Scopes – as applicable
- VI. Reference Documents – Info can be found at following link:**
  - a. Existing Structural/Architectural Drawings – original construction & recent renovations, as applicable
  - b. Existing Electrical Drawings – original construction & recent renovations, as applicable
- VII. Addenda Issued to the OPR Documents**
  - a. Addendum No 1 – to be determined

## Pre-Proposal Meeting Agenda

May 6, 2026

**NOTE: This document is a part of the OPR proposal request documentation**

### Project:

**Fairfield County Board of Developmental Disabilities:  
Forest Rose School HVAC Improvements 2026 Project**  
739 College Avenue, Lancaster, Ohio 43130

### Agenda:

#### **I. Introductions**

- a. Owner – Fairfield County
  - i. Mr. Todd McCullough, Director of Operations
- b. Criterion Engineer/Owner's Advocate – County FIRM
  - i. Eric Booher, P.E. – Director of Operations
  - ii. Tommy Poole - Engineer
- c. Selected Design-Build Contractor Team(s)
  - i. HVAC

#### **II. Goals of Pre-Proposal Meeting – Prepare Proposers for Delivery of Qualified Proposals**

- a. General Items:
  - i. Refer to Add No 1. For Pre-Proposal Meeting Attendance Sheet
  - ii. Bid Info – **May 15, 2026 @ 10 AM** via process and location indicated
  - iii. Bid Bond & Bid Form as prescribed
  - iv. Contract duration – County will adjust based on approvals and Notice of Intent, but Contractor expected to do pre-contract final design & coordination as soon as notified: TARGET to complete entirety of project prior to School start August 2026.
  - v. Letter of Intent right after Proposals, Contract prep & approval phase after
- b. Describe Expected Work - refer to Bid Form and Owner's Program of Requirements (OPR) Docs distributed prior to this meeting and subsequently distributed.
  - i. PROJECT SITE: Forest Rose School, 739 College Avenue, Lancaster, OH 43130
  - ii. BASE:
    1. Removal of existing water source heat pumps.
    2. Installation of water source heat pumps.

3. Extend piping and provide new valves and control valves at each new heat pump.
  4. Provide new condensation piping for the new unit locations.
  5. New controls for the heat pumps. Controls are to be by Speer Mechanical.
  6. Provide final O&M manuals and as-builts for the project.
  7. **Includes ALLOWANCE by Bid Line Item (to be included w/ Proposals)**
    - a. **Base ITEM 1 Forest Rose School HVAC Improvements 2026: \$35,000.00.**
- c. Describe Delivery of the Work – Performance Specification Single Proposal
- d. Describe Anticipated Timeframes – monies are encumbered, proceed from proposals to contract negotiations without delay, key is being ready for full system operation as allowable by Project Schedules/Site Completions.
- e. Established Pre-Proposal Communication pathways
- i. RFI-style E-mail preferred: to Eric Booher, [ebooher@countyfirm.org](mailto:ebooher@countyfirm.org)
  - ii. Voice questions are not allowed.
  - iii. County FIRM will publish all pertinent Non-PROPRIETARY info/answers to RFIs.
- Last date for Proposer Questions is Friday May 8, 2026 by Noon.**

### III. Scope of Work

- a. Project Development/History
- b. Current Targets
  - i. Update HVAC Infrastructure – by Proposer as required for coordinated Scopes of Work and existing Electrical

### IV. Project Framework and Delivery

- a. Single Performance Specification (includes applicable portions of vendor-based Final designs) Agreement with Contractor. The Project (This Project is NOT “Plan-&-Spec” construction) is to include:
  - i. Options for BASE, ALTs & applicable Value-add Proposals/Clarifications.
  - ii. Electrical Prime with appropriate Main Structural, General, Plumbing, & Low Voltage Electrical (as applicable), subject to Fairfield County/County FIRM reviews and subsequent approvals.
  - iii. Final Planning & Design (this includes scopes related to applicable plan reviews, permits and approvals & detailed coordination/support from chosen/pre-arranged Vendors).
  - iv. Coordination & Project Management.
  - v. Complete Turn-Key Installation Services AND provision of spec'd Documentation.
  - vi. County requires Contractor to provide Bond for their Work/Proposal – refer to published Front End documents from County.

**V. Owner's Project Requirements (OPR)**

- a. Project Pre-Planning Documents, as applicable
  - i. Overall Narratives, Study & Related documents – as applicable
  - ii. Asbestos inspection documents – as applicable, not anticipated.
- b. Front-End Documents
  - i. Instructions & Notices
  - ii. Bid/Proposal Forms
  - iii. Specified Wages/Agreements
  - iv. Anticipated Forms of Contract-Agreement/Supplemental information
- c. Specifications
  - i. Overall Criteria, Descriptions and Boundaries
  - ii. Specific Sections/information as applicable to Owner's Standards, choices & preferences
- d. Drawings – Schematic Not-to-Scale (not 'Dimensioned' set) with Best-Scale 'reference' Plans as available – refer to published online link.
  - i. Schematic and Specific Demolition
  - ii. Schematic and Targeted Update Descriptions

**VI. Anticipated Project Schedule items**

- a. **Design-Build Proposals Due to County May 15, 2026, 10:00 a.m. est.**
  - i. Single Turnkey Bid Price – Lump Sum
    - 1. Standard Bonding requirements apply
    - 2. Specified Wage schedules apply
    - 3. Bid/Proposal submission as noted – confirm with Front End requirements
  - ii. Confirmation of Project Schedule targets
- b. Pre-Proposal Walk-Thru
  - i. Initial: May 6, 2026 at 1:00 p.m.
  - ii. Planned Subsequent Times
    - 1. As Scheduled with County Personnel – minimum 48 hour notice
- c. Bidders Scope-Reviews – Targeted **May 18, 2026.**
  - i. Selection Criteria: Best Value (Schedule, Scope & Pricing).
- d. Recommendation/Selection of Best VALUE Bid/Proposal- Target: **May 19, 2026**
- e. Construction Targets:
  - i. Begin, Upon Board of DD Approvals & Valid Notice-to-Proceed – by May 20, 2026.
    - 1. Notice of Intent to award (end of January) is expected to instigate 'paperwork/submittal' preparations while final Orders are being approved (February) – to make best/flexible progress for all parties.
  - ii. Complete Commissioning of Project by mid-August 2026.



280 N. High Street  
Columbus, Ohio 43215  
Phone (614) 588-3450

**VII. Important Discussion Items:**

- a. Asbestos Abatement – arranged by County direct with Abatement Contractors.
  - i. None anticipated.
- b. Simultaneous Projects – County may have standard projects going on during the Construction period/breaks. Bidders must be prepared to Coordinate Construction efforts/timing.
  - i. None at current time.
- c. Work Access: building areas will be fully usable by the County during planned Construction Period. Construction activities that may impact Building Schedules will need to be worked-around (no “free” access can be planned for, but County is committed to coordination to help project).
  - i. Overtime/Shutdown/Weekend Efforts will likely be required to complete Work in time, including any required crane/rig lifts.
    1. Expected End-of-Day is 4:30 p.m.
  - ii. Parking – some is available at/near jobsite in designated areas only.
  - iii. Entry/Staging: Coordination with Fairfield County DD Facilities/Security Personnel is required.
- d. Security: Background checks and Screening/Badging **could** be required.
- e. Salvage Rights – Fairfield County DD reserves the rights to retain any contractor-removed items. For all items not retained by County, the Contractor is responsible for complete disposal.
- f. Specific Construction Items:
  - i. Cleanliness – daily requirement for all areas
  - ii. As-built Documents – must provide accurate records for HVAC modifications
  - iii. Project Meetings
    1. Periodic Progress Meetings with Key Staff may be required.

**VIII. Questions**

**IX. Subsequent Tour of work areas – after Pre-Proposal Meeting.**

**This Meeting Agenda and subsequent NOTES are to be considered a part of the OPR Documents being used to prepare the Performance Spec Proposals. Please notify the writer if any items are not clear enough as stated or omitted as understood from the discussions.**

Eric M. Booher, P.E.  
County FIRM  
280 N. High Street  
Columbus, Ohio 43215  
614-588-3450 mobile  
[ebooher@countyfirm.org](mailto:ebooher@countyfirm.org)

## Public Notice

FAIRFIELD COUNTY BOARD OF DEVELOPMENTAL DISABILITIES  
795 College Avenue  
Lancaster, Oh 43130

### Request for Proposals for Forest Rose School HVAC Improvements

Fairfield DD is requesting proposals for HVAC Improvements including labor, material, and services necessary for updating the Electrical Power Infrastructure at; Forest Rose School, 739 College Ave., Lancaster. More details are provided in the specifications. Qualified bidders shall have until **10:00 AM on May 15th, 2026**, to submit their sealed proposal to Todd McCullough, 795 College Ave., Lancaster, Oh 43130.

Proposals submitted after this time will NOT be accepted. Proposals will be publicly opened and read at 1:00pm on May 28th, 2026, at the Administration Building, 795 College Ave., Lancaster, Oh. Bids shall comply with standards set forth in the Request for Proposals (RFP) posted for download on the Fairfield DD website at: <https://www.fairfielddd.com>. Printed copies are available at the Administration Building, 795 College Ave., Lancaster, Oh during business hours.

A pre-bid meeting will be held Wednesday May 6th, 2026, at 1:00 p.m. at Forest Rose School, Lancaster, Ohio 43302. We will meet in the front entry.

Questions regarding plans and specifications should be addressed in writing to County Firm, Attn: Eric Booher at [ebooher@countyfirm.com](mailto:ebooher@countyfirm.com).

Proposals must be submitted in a sealed envelope, and clearly marked, "SEALED RFP FOR FOREST ROSE SCHOOL HVAC IMPROVEMENTS". Fairfield DD reserves the right to reject any and all bids in response to this RFP, and to waive any irregularities, nonconformities, or noncompliance with the terms of this RFP. Fairfield DD is an Equal Opportunity Employer. Bidders are required to certify equal employment opportunity and drug-free workplace, among other certifications required in the bid documents.

INSTRUCTIONS TO BIDDERS

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A. BIDDER'S PLEDGE AND AGREEMENT

1. Each Bidder acknowledges that this is a public project involving public funds and that the Owner expects and requires that each successful Bidder adhere to the highest ethical and performance standards. Each Bidder by submitting a bid pledges and agrees that (a) it will act at all times with absolute integrity and truthfulness in its dealings with the Owner and the Design Professional, (b) it will use its best efforts to cooperate with the Owner and the Design Professional and all other Contractors on the Project and at all times will act with professionalism and dignity in its dealings with the Owner, Design Professional, and other Contractors, (c) it will assign only competent supervisors and workers to the Project, each of whom is fully qualified to perform the tasks that are assigned to him/her, and (d) it has read, understands and will comply with the terms of the Contract Documents.

B. EXAMINATION OF CONTRACT DOCUMENTS AND SITE CONDITIONS AND RELIANCE UPON TECHNICAL DATA

1. Each Bidder shall have a competent person carefully and diligently review each part of the Contract Documents, including the Divisions of the Specifications and parts of the Drawings that are not directly applicable to the Work on which the Bidder is submitting its bid. By submitting its bid, each Bidder represents and agrees, based upon its careful and diligent review of the Contract Documents, that it is not aware of any conflicts, inconsistencies, errors, or omissions in the Contract Documents for which it has not notified the Design Professional in writing at least ten (10) days prior to the bid opening. If there are any such conflicts, inconsistencies, errors, or omissions in the Contract Documents, the Bidder (i) will provide the labor, equipment, or materials of the better quality or greater quantity of Work and/or (ii) will comply with the more stringent requirements. The Bidder will not be entitled to any Change Order, additional compensation, or additional time on account of such conditions for any conflicts, inconsistencies, errors, or omissions that would have been discovered by such careful and diligent review, unless it has given prior written notice to the Design Professional.
2. Each Bidder shall have a competent person carefully and diligently inspect and examine the entire site and the surrounding area, including all parts of the site applicable to the Work for which it is submitting its bid, including location, condition, and layout of the site and the location of utilities, and carefully correlate the results of the inspection with the requirements of the Contract Documents. The Bidder's bid shall include all costs attributable to site and surrounding area conditions that would have been discovered by such careful and diligent inspection and examination of the site and the surrounding area, and the Bidder shall not be entitled to any Change Order, additional compensation, or additional time on account of such conditions.
3. The Bidder may rely upon the general accuracy of any technical data identified in the Owner- Contractor Agreement (e.g., any soils exploration reports, soil boring logs, site survey, or abatement reports) in preparing its bid, but such technical data are not part of the Contract Documents. Except for the limited reliance described in the preceding sentence, Bidder may not, if awarded a contract for the Work, rely upon or make any Claim against the Owner or Design Professional, or any of their agents or employees, with respect to any of the following:
  - (a) the completeness of such reports and drawings for Bidder's purposes, including, but not limited to, any aspects of the means, methods, techniques, sequences, and procedures of construction to be employed by the successful Bidder and safety precautions and programs incident thereto; or
  - (b) any interpretation by the successful Bidder of or conclusion drawn from any technical data or any such other data, interpretations, opinions, or information.

For example, all interpolations and extrapolations of data performed by the Bidder to estimate locations or quantities of subsurface strata are independent factual assumptions, which Owner does not warrant.

4. Each Bidder will be deemed to have actual knowledge of all information provided or discussed at the pre-bid meeting.

C. PROJECT

1. The project is the Forest Rose School HVAC Improvements 2026 Project (the “Project”). The Project and Work for the Project consist of replacing existing water source heat pump equipment located in the Forest Rose School located at 739 College Avenue, Lancaster, Ohio 43130. The Scope of the Project is as follows:

- a. Replacement of existing water source heat pumps with new water source heat pumps, controls and piping.

2. The Design Professional for the Project is:

CountyFirm  
280 N. High St, Suite 100  
Columbus, OH 43215  
Eric Booher, P.E.  
ebooher@countyfirm.org

D. WORK

It is anticipated that only one contract will be issued by the Owner for constructing the Project, the Contract, which will cover all scopes of work necessary to construct the Project.

1. The Contractor awarded the Contract (HVAC Contractor) will be responsible for the performance and coordination of any and all subcontractors and suppliers either directly or indirectly contracted with the General Contractor.
2. Owner may provide Bidders access to the Project site to conduct such examinations, investigations, explorations, tests, and studies as Bidder deems necessary for submission of a Bid. Bidder shall fill all holes and clean up and restore the Site to its former condition upon completion of such explorations, investigations, tests, and studies. Bidder shall comply with all applicable Laws and Regulations and Owner’s policies relative to excavation and utility locates. Bidders must follow COVID-19 safety protocols required by law or requested by the Owner. Bidder shall receive prior permission before such site visit. Access to the Project site may be obtained by request to Todd McCullough, Director of Operations, at [todd.mccullough@fairfielddd.com](mailto:todd.mccullough@fairfielddd.com).

E. ESTIMATE OF COST

The total estimated construction cost for the base bid is \$1,000,000.00 including allowances:

The Bidder’s base bid shall include the following allowances: \$35,000.00

F. CONTRACT DOCUMENTS AND PRE-BID MEETING

1. The Contract Documents consist of the Contract Documents listed in Section 2 of the Owner- Contractor Agreement.
2. Electronic copies of the Contract Documents will be available by request, from Eric Booher at [ebooher@countyfirm.org](mailto:ebooher@countyfirm.org) and can be downloaded from the Fairfield County Developmental Disabilities website at <https://www.fairfielddd.com/public-notice>.

3. Bidders shall use complete sets of Contract Documents in preparing bids. Neither the Owner nor the Design Professional assumes any responsibility for errors or misinterpretations resulting from the use of incomplete sets of Contract Documents.
4. The Owner or the Design Professional, in making the Contract Documents available on the above terms, does so only for the purpose of obtaining bids on the Work and does not confer a license or grant for any other use.
5. A pre-bid conference will be held May 6, 2026 at 1:00 p.m. at 795 College Avenue, Lancaster, Ohio 43130. Site visit to project site will be immediately following the meeting.

Attendance is highly recommended. The Owner shall not be held liable if a bidder is unable to attend.

G. PREPARATION OF BIDS

1. All bids must be submitted on the "Bid Form" furnished with the Contract Documents.
2. All blank spaces shall be filled in, in ink or typewritten, in words and figures, and in figures only where no space is provided for words, and signed by the Bidder. The wording on the Bid Form shall be used without change, alteration, or addition. Any change in the wording or omission of specified accompanying documents may cause the bid to be rejected. If there is an inconsistency or conflict in the bid amount, the lowest amount shall control, whether expressed in numbers or words.
3. Bidders shall note receipt of Addenda on the Bid Form. If the Bidder fails to acknowledge receipt of each Addendum, the Bid shall be deemed non-responsive, unless the Bid amount clearly and unambiguously reflects receipt of the Addendum or the Addendum involves only a matter of form and does not materially affect the price, quantity or quality of the Work to be performed.
4. Each Bidder shall submit 2 originals of its bid to the Owner. The Bid Form shall be signed with the name typed or printed below the signature. A Bid shall not be submitted by facsimile transmission or any other electronic means. A Bidder that is a corporation shall sign its bid with the legal name of the corporation followed by the name of the state of incorporation and the legal signature of an officer authorized to bind the corporation to a contract.
5. Bids shall be enclosed in a sealed opaque envelope with the Bidder's name, plainly marked on the outside "FOREST ROSE HVAC IMPROVEMENTS 2026 PROJECT BID," and addressed as follows:

Fairfield County Board of Developmental Disabilities  
ATTN: Todd McCullough, Director of Operations  
795 College Avenue  
Lancaster, Ohio 43130

Bids must be received at the location designated above before 10:00 A.M., local time on or before May 15, 2026.

6. The completed Bid Form shall be accompanied by the following completed

documents:

- (a) Bid Guaranty and if applicable, Contract Bond (See Paragraph G.8 below.)
- (b) Contractor's Qualification Statement (See Paragraph H.4 below.)

7. The Bidder shall take the following precautions in preparing its bid:

- a. Sign the bid and check to ensure all blank spaces have been filled in with requested information and that the specified accompanying documents (listed in Paragraph G.6 above) have been included in a sealed opaque envelope addressed as described in item Paragraph G.5 above.
- b. When the Bid Form provides for quoting either an addition or deduction for an Alternate item, indicate whether the sum named is an addition or deduction. If it is not indicated, it will be conclusively presumed that the amount is a deduction.
- c. When the Bid Form provides for quoting a unit price, the Bidder should quote the unit price as set forth in the Contract Documents and as described in Paragraph L.1 below.
- d. When applicable, make sure that the Bid Guaranty is properly executed and signed by:
  - 1) The Bidder
  - 2) The Surety or Sureties
- e. Make sure that the amount of the Bid Guaranty (if the Bid Guaranty is in the form of a certified check, letter of credit, or cashier's check) is for a specific sum in an amount as instructed in Paragraph G.8.a below. If the Bid Guaranty is in the form of the Bid Guaranty and Contract Bond, the amount may be left blank; if an amount is inserted, it must equal the total of the base bid plus the amount of all add alternates included in the bid. If inserted, then the failure to state an amount equal to the total of the base bid and all add alternates shall make the bid non-responsive if the Owner selects alternates not included in the amount.
- f. Make sure that the appropriate bid package and scope of work is inserted in the correct space on the Bid Guaranty and Contract Bond Form. Failure to include work covered by the bid submitted may make the bid non-responsive.

8. Bonds and Guarantees

- a. Bid Guaranty: Bidder shall furnish a Bid Guaranty, in the form prescribed in Sections 153.54, 153.57, and 153.571 of the Ohio Revised Code, in the form of either: (1) a bond for the full amount of the Base Bid plus the amount of all Add Alternates included in the Bidder's bid, in the form of the Bid Guaranty and Contract Bond included in the Contract Documents; or (2) a certified check, cashier's check, or irrevocable letter of credit in a form satisfactory to the Owner in an amount equal to 10% of the bid. Bid amount shall be the total of all sums bid, including all add alternatives, but excluding all deduct alternatives. NOTE: AIA or EJCDC Bid Bond forms are not acceptable.
- b. Contract Bond: The successful Bidder, who, as a Bid Guaranty, submits a certified check, cashier's check, or irrevocable letter of credit in an amount equal to 10% of

the bid, shall furnish a Contract Bond in the form Contract Bond included in the Contract Documents in an amount equal to 100% of the Contract Sum. NOTE: AIA or EJCDC Bond forms are not acceptable.

- c. The bond must be issued by a surety company authorized by the Ohio Department of Insurance to transact business in the State of Ohio and acceptable to the Owner. The bond must be issued by a surety capable of demonstrating a record of competent underwriting, efficient management, adequate reserves, and sound investments. These criteria will be deemed to be met if the surety currently has an A.M. Best Company Policyholders Rating of "A-" or better and has or exceeds the Best Financial Size Category of Class VI. Other sureties may be acceptable to the Owner, in its sole discretion
- d. All bonds shall be signed by an authorized agent of an acceptable surety and by the Bidder.
- e. Surety bonds shall be supported by credentials showing the Power of Attorney of the agent, a certificate showing the legal right of the Surety Company to do business in the State of Ohio, and a financial statement of the Surety.
- f. The Bid Guaranty, as applicable, shall be in the name of or payable to the order of the Owner.
- g. The name and address of the Surety and the name and address of the Surety's Agent should be typed or printed on each bond.

#### H. METHOD OF AWARD

1. All bids shall remain open for acceptance for sixty (60) days following the day of the bid opening, but the Owner may, in its sole discretion, release any bid and return the Bid Guaranty prior to that date. The Bid Guaranty shall be subject to forfeiture, as provided in the Ohio Revised Code, if a bid is withdrawn during the period when bids are being held.
2. The Owner reserves the right to reject any, part of any, or all bids and to waive any informalities and irregularities. The Bidder expressly acknowledges this right of the Owner to reject any or all bids or to reject any incomplete or irregular bid. Bidders must furnish all information requested on or accompanying the Bid Form. Failure to do so may result in disqualification of the bid.
3. Determination of the Lowest and Best Bid. Subject to the right of the Owner to reject any or all bids, the Owner will award the Contract for the Work to the bidder submitting the lowest and best bid that is responsive to the bidding requirements, taking into consideration accepted alternates. In evaluating bids, the Owner may consider the qualifications of the Bidders, whether or not the bids comply with the prescribed requirements, and alternates and unit prices, if requested, on the Bid Form. The Owner may also consider the qualifications and experience of subcontractors and suppliers. The Owner may conduct such investigations as are deemed necessary to establish the qualifications and financial ability of the Bidder and its subcontractors and suppliers. The factors the Owner may consider in determining which bid is the lowest and best bid include the factors set forth below. The Owner, in its discretion, may consider and give such weight to these criteria as it deems appropriate.

- a. The Bidder's work history. The Bidder should have a record of consistent customer satisfaction and of consistent completion of projects, including projects that are comparable to or larger and more complex than the Owner's Project, on time and in accordance with the applicable Contract Documents, and based upon the Bidder's claims history. If the Bidder's management operates or has operated another construction company, the Owner may consider the work history of that company in determining whether the Bidder submitted the lowest and best bid.

The Owner will consider the Bidder's prior experience on other projects of similar scope and/or complexity including prior projects with the Owner and/or Design Professional, including the Bidder's demonstrated ability to complete its work on these projects in accordance with the Contract Documents and on time, and will also consider its ability to work with the Owner and Design Professional as a willing, cooperative, and successful team member. Bringing overstated claims, an excessive number of claims, acting uncooperatively, and filing lawsuits against project owners and/or their design professionals on prior projects of similar scope and/or complexity will be deemed evidence of a Bidder's inability to work with the Owner and Design Professional as a willing, cooperative, and successful team member.

The Bidder authorizes the Owner and its representatives to contact the owners and design professionals (and construction managers, if applicable) on projects on which the Bidder has worked and authorizes and requests such owners and design professionals (and construction managers) to provide the Owner with a candid evaluation of the Bidder's performance. By submitting its bid, the Bidder agrees that if it or any person, directly or indirectly, on its behalf or for its benefit brings an action against any of such owners or design professionals (or construction managers) or the employees of any of them as a result of or related to such candid evaluation, the Bidder will indemnify and hold harmless such owners, design professionals (and construction managers) and the employees of any of them from any claims, whether or not proven, that are part of or are related to such action and from all legal fees and expenses incurred by any of them arising out of or related to such legal action. This obligation is expressly intended for the benefit of such owners, design professionals (and construction managers), and the employees of each of them.

- b. The Bidder's financial ability to complete the Contract successfully and on time without resort to its Surety.
- c. The Bidder's prior experience with similar work on comparable or more complex projects.
- d. The Bidder's prior history for the successful and timely completion of projects, including the Bidder's history of filing claims and having claims filed against it.
- e. The Bidder's equipment and facilities.
- f. The adequacy, in numbers and experience, of the Bidder's work force to complete the Contract successfully and on time.
- g. The Bidder's compliance with federal, state, and local laws, rules, and regulations, including but not limited to the Occupational Safety and Health Act, the Ohio Prevailing Wage laws, and Ohio ethics laws.
- h. The Bidder's participation in a drug-free workplace program acceptable to the Owner, and the Bidder's record for both resolved and unresolved findings of the Auditor of State for recovery as defined in Section 9.24 of the Ohio Revised Code.
- i. The Owner's prior experience with the Bidder's surety.

- j. The Bidder's interest in the Project as evidenced by its attendance at any pre-bid meetings or conferences for bidders.
  - k. Depending upon the type of the work, other essential factors, as the Owner may determine and as are included in the Specifications.
  - l. The number of years the Bidder has been actively engaged as a contractor in the construction industry.
  - m. Financial responsibility demonstrated by the Bidder and whether Bidder possesses adequate resources and availability of credit, the means and ability to procure insurance and acceptable performance bonds required for the Project and whether any claims have been made against performance bonds secured by the bidder on other construction projects.
  - n. The foregoing information with respect to each of the Subcontractors and Suppliers that the Bidder intends to use on the Project.
4. Qualifications Statement. Each Bidder will submit with its bid a completed Contractor Qualifications Statement, which is included with the Contract Documents, and thereafter provide the Design Professional promptly with such additional information as the Design Professional may request regarding the Bidder's qualifications. A Bidder shall submit any requested additional information within 24 hours of the date on the request.
5. The failure to submit requested information on a timely basis may result in the determination that the Bidder has not submitted the lowest and best bid.
6. By submitting its bid, the Bidder agrees that the Owner's determination of which bidder is the lowest and best bidder shall be final and conclusive, and that if the Bidder or any person on its behalf challenges such determination in any legal proceeding, whether or not proven, the Bidder will indemnify and hold the Owner and its employees and agents harmless from any claims included or related to such legal proceeding, whether or not proven, and from legal fees and expenses incurred by the Owner, its employees, or agents that arise out of or are related to such challenge.
7. After bid opening, within 24 hours of a request made by the Owner or Design Professional, the apparent low Bidder and any other Bidder so requested must submit the following:
- a. SUBCONTRACTORS: For all subcontracts with an estimated value of at least \$20,000, a list of all Subcontractors that the Bidder will use to construct the Project, as well as an indication of whether or not the Bidder has ever worked with a proposed Subcontractor before, including the following information for the three most recent projects on which the Bidder and each Subcontractor have worked together:
    - Project Owner
    - Project Name
    - Subcontract Scope
    - Subcontract Value
    - Owner's contact name and phone number.

If Bidder and a proposed Subcontractor have not worked together on at least three projects in the five years, Bidder must submit the information set forth

above for the three most recent similar projects to the Project that a proposed Subcontractor has worked on.

The above Subcontractor information, as well as the information pertaining to each proposed Subcontractor, shall be used in the Owner's determination of the lowest and best bid.

Once a Bidder identifies its proposed Subcontractors as set forth herein, and Owner makes no objections, the list shall not be changed unless written approval of the change is authorized by the Owner and Design Professional.

b. FINANCING: The following additional financial information is not a public record under Ohio Revised Code Section 149.43 and will be kept confidential, except under proper order of a court, per Ohio Revised Code Section 9.312(A).

i. Provide a financial statement, preferably audited, including your organization's latest balance sheet and income statement showing the following items:

- Current Assets (e.g., cash, joint venture accounts, accounts receivable, notes receivable, accrued income, deposits, materials inventory and prepaid expenses);
- Net Fixed Assets;
- Other Assets;
- Current Liabilities (e.g., accounts payable, notes payable, accrued expenses, provision for income taxes, advances, accrued salaries and accrued payroll taxes); and
- Other Liabilities (e.g., capital, capital stock, authorized and outstanding shares par values, earned surplus and retained earnings).

ii. Provide the name and address of firm preparing attached financial statement, and date thereof.

iii. If the attached financial statement is not for the identical organization named in the completed Contractor's Qualification Statement submitted with the bid, explain the relationship and financial responsibility of the organization whose financial statement is provided (e.g., parent-subsidiary).

8. Affidavit as to Personal Property Taxes. Each successful Bidder shall submit, prior to the time of the entry into the Contract, an affidavit in the form required by Section 5719.042, Ohio Revised Code, regarding the status of the Bidder's personal property taxes. A copy of the affidavit form is included with the Contract Documents.
9. No Bidder may withdraw its bid within sixty (60) days after the date bids are opened. The Owner reserves the right to waive any formalities or irregularities or to reject any or all bids.
10. The Owner reserves the right to disqualify bids, before or after opening, upon evidence of collusion with intent to defraud or other illegal practices on the part of the Bidder.

11. Award of Contract. The award of the Contract, when required, will only be made pursuant to a duly adopted resolution of the Owner.

#### I. EXECUTION OF CONTRACT

1. Within the time designated by the Owner or Design Professional after award of the Contract, the successful Bidder shall execute and deliver to the Owner or Design Professional the required number of copies of the Owner-Contractor Agreement, in the form included in the Contract Documents, and all accompanying documents requested, including, but not limited to, a Contract Bond (if applicable), insurance certificates, and a valid Workers' Compensation Certificate. The successful Bidder shall have no property interest or rights under the Owner- Contractor Agreement until the Agreement is executed by the Owner.

#### J. SUBSTITUTIONS/NON-SPECIFIED PRODUCTS

1. Certain brands of material or apparatus are specified. Each bid will be based on these brands, which may be referred to in the Contract Documents as Standards. The use of another brand (referred to as a substitution or proposed equal in the Contract Documents, when a bidder or the contractor seeks to have a different brand of material or apparatus than that specified approved by the Owner for use in the Project) may be requested as provided herein.
2. The products specified in the Contract Documents establish a standard of required function, dimension, appearance, and quality.
3. Bidders wishing to obtain approval to bid non-specified products shall submit written requests to the Design Professional a minimum of ten (10) calendar days before the bid date and hour. To facilitate the submission of requests, a Pre-Bid Substitution Form is included in the Contract Documents. The Bidder shall include the name of the material or equipment for which it is to be substituted and a complete description of the proposed substitution, including the name of the proposed manufacturer and/or product and a complete description of the proposed product including the manufacturer's name and model number or system proposed, drawings, product literature, performance and test data, color selections or limitations, and any other information necessary for evaluation. Include a statement including any changes in other materials, equipment, or other work that would be required if the proposed product is incorporated in the materials, equipment, or other work that would be required if the proposed product is incorporated in the work. The burden of proof of the merit of the proposed product is on the proposer. The Design Professional's decision on approval of a proposed product will be final.

The following will be cause for rejection of a proposed substitution:

- a. Requests submitted by subcontractors, material suppliers, and individuals other than Bidders;
- b. Requests submitted without adequate documentation.
- c. Requests received after the specified cut-off date.
4. When the Design Professional approves a product submission before receipt of bids, the approval will be included in an Addendum, and Bidders may include the pricing of this product in their bid. Bidders shall not rely on approvals made in any other manner.

5. In proposing a non-specified product or a substitution, the Bidder represents and warrants that each proposed product will not result in any changes to the Project, including changes to the Work of other contractors, or any decrease in the performance of any equipment or systems to be installed in the Project and agrees to pay any additional costs incurred by the Owner and the Owner's consultants as a result of a non-specified or substitute product that is accepted.
6. Following the award of the Contract, there shall be no substitutions for specified products, except pursuant to a Change Order. The Owner in its sole discretion may decline to consider a substitution for a Change Order.

#### K. ALTERNATES

1. The Owner may request bids on alternates. If the Owner requests bids on alternates, the Bidder should include the cost of the alternates requested on its Bid Form.
2. At the time of awarding the Contract, the Owner will select or reject alternates as it determines is in its best interest. A Bidder's failure to include on its Bid Form the cost of an alternate selected by the Owner and applicable to the Bidder's work shall render the bid non-responsive and be grounds for the rejection of the bid. Otherwise, the failure to include the cost of an alternate will not be deemed material.
3. The Bidder acknowledges that although there is an estimate for the cost of the Project, the market conditions may and frequently do result in the estimate being different from the sum of the bids received, either higher or lower. The Bidder understands that the Owner may include alternates, which may include deduct alternates as well as add alternates, to give it flexibility to build the Project with the funds available. The Bidder further understands and acknowledges that use of add and deduct alternates is a long held customary practice in the construction industry in the State of Ohio. The Bidder also acknowledges that the Owner will not make a decision about the alternates on which to base the award of contracts until the bids are received, and the Owner can compare its available funds with the base bids and the cost or savings from selecting different alternates. The Bidder understands that the award to the Bidder submitting the lowest and best bid will be based on the lowest base bid plus selected alternates, and may result in an award to a Bidder other than the Bidder that submitted the lowest base bid.
4. If, during the progress of the Work, the Owner desires to reinstate any alternate not included in the Contract, the Owner reserves the right to reinstate the alternate at the price bid by the Contractor provided that such action is taken in sufficient time so as not to delay the progress of the work or cause the Contractor additional expense.

#### L. UNIT PRICES

1. Where unit prices are requested in the Bid Form the Bidder should quote a unit price. Unless otherwise expressly provided in the Contract Documents, such unit prices shall include all labor, materials, and services necessary for the timely and proper installation of the item for which the unit prices are requested. The unit prices quoted in the bid shall be the basis for any Change Orders entered into under the Owner-Contractor Agreement, unless the Design Professional determines that the use of such unit prices will cause substantial inequity to either the Contractor or the Owner.

#### M. ADDENDA

1. The Owner reserves the right to issue Addenda changing, altering, or supplementing the Contract Documents prior to the time set for receiving bids. The Design Professional will issue the Addenda to clarify bidders' questions and/or to change, alter, or supplement the Contract Documents.
2. Any explanation, interpretation, correction, or modification of the Contract Documents will be issued in writing in the form of an Addendum, which shall be the only means considered binding; explanations, interpretations, etc., made by any other means shall NOT be legally binding. All Addenda shall become a part of the Contract Documents.
3. Bidders shall submit written questions to Eric Booher, CountyFirm [ebooher@countyfirm.org](mailto:ebooher@countyfirm.org) by 12:00 P.M., Friday May 8, 2026 to allow sufficient time for the Design Professional to respond. All Addenda will be issued, except as hereafter provided, and e- mailed or otherwise furnished to persons who have obtained Contract Documents for the Project, at least seventy-two (72) hours prior to the published time for the opening of bids, excluding Saturdays, Sundays, and legal holidays. If any Addendum is issued within such seventy-two (72) hour period, then the time for opening of bids shall be extended one (1) week with no further advertising of bids required.
4. Copies of each Addendum will be sent only to the Bidders to whom Contract Documents have been issued and to Plan Rooms where copies of the Contract Documents are maintained. Receipt of Addenda shall be indicated by Bidders in the space provided on the Bid Form. Bidders are responsible for acquiring issued Addenda in time to incorporate them into their bid. Bidders should contact the Design Professional prior to the bid opening to verify the number of Addenda issued.
5. Each Bidder shall carefully read and review the Contract Documents and immediately bring to the attention of the Design Professional any error, omission, inconsistency, or ambiguity therein.
6. If a Bidder fails to indicate receipt of all Addenda through the last Addendum issued by the Design Professional on its Bid Form, the bid of such Bidder will be deemed to be responsive only if:
  - a. The bid received clearly indicates that the Bidder received the Addendum, such as where the Addendum added another item to be bid upon and the Bidder submitted a bid on that item; or
  - b. The Addendum involves only a matter of form or is one which has either no effect or has merely a trivial or negligible effect on price, quantity, quality, or delivery of the item bid upon.

#### N. INTERPRETATION

1. If a Bidder contemplating submitting a bid for the proposed Project is in doubt as to the true meaning of any part of the Contract Documents, it may submit a written request for an interpretation thereof to Eric Booher, CountyFirm at [ebooher@countyfirm.org](mailto:ebooher@countyfirm.org) by the deadline for questions per paragraph M.3 above. Any interpretation of the proposed documents will be made by Addendum only, duly signed by the Design Professional, and a copy of such Addendum will be mailed or delivered to each Bidder receiving a set of Contract Documents and each plan room where the Contract Documents are maintained. The Owner will not be responsible for any other explanation or interpretation of the proposed documents.
2. In interpreting the Contract Documents, words describing materials that have a well-known technical or trade meaning, unless otherwise specifically defined in the Contract Documents, shall be construed in accordance with the well-known meaning recognized by the trade.

3. Bidders are responsible for notifying the Owner and the Design Professional in a timely manner of any ambiguities, inconsistencies, errors, or omissions in the Contract Documents. The Bidder shall not, at any time after the execution of the Contract, be compensated for a claim alleging insufficient data, incomplete Contract Documents, or incorrectly assumed conditions regarding the nature or character of the Work, if no request was made by the Bidder prior to the bid opening.

O. STATE SALES AND USE TAXES

1. The Owner is a political subdivision of the State of Ohio and is exempt from taxation under the Ohio Sales Tax and Use Tax Laws. Building materials that the successful Bidder purchases for incorporation into the Project will be exempt from state sales and use taxes if the successful Bidder provides a properly completed Ohio Department of Taxation Construction Contract Exemption Certificate to the vendors or suppliers when the materials are acquired. The Owner will execute properly completed certificates on request.

P. DATE FOR SUBSTANTIAL COMPLETION/ DATE FOR FINAL COMPLETION /LIQUIDATED DAMAGES

1. The Date for Substantial Completion (aka Contract Time), Date for Final Completion, and Liquidated Damages shall be as defined and set forth in the Owner-Contractor Agreement. By submitting its Bid, each Bidder agrees that the period for performing its Work is reasonable.

Q. OWNER'S RIGHT TO WAIVE DEFECTS AND IRREGULARITIES

1. The Owner reserves the right to waive any and all irregularities provided that the defects and irregularities do not affect the amount of the bid in any material respect or otherwise give the Bidder a competitive advantage.

R. MODIFICATION/WITHDRAWAL OF BIDS

1. Modification. A Bidder may modify its bid by written communication to the Owner addressed to the Owner's Representative at any time prior to the scheduled closing time for receipt of bids, provided such written communication is received by Owner's Representative prior to the bid deadline. The written communication shall not reveal the bid price, but should provide the addition or subtraction or other modification so that the final prices or terms will not be known until the sealed bid is opened. If the Bidder's written instructions with the change in bid reveal the bid amount in any way prior to the bid opening, the bid may be rejected as non-responsive.
2. Withdrawal Prior to Bid Deadline. A Bidder may withdraw its bid at any time for any reason prior to the bid deadline for the opening of bids. The request to withdraw shall be made in writing to and received by the Owner prior to the time of the bid opening.
3. Withdrawal after Bid Deadline.
  - a. All bids shall remain valid and open for acceptance for a period of at least 60 days after the bid opening; provided, however, that a Bidder may withdraw its bid from consideration after the bid deadline when all of the following apply:
    - (1) the price bid was substantially lower than the other bids;
    - (2) the reason for the bid being substantially lower was a clerical mistake, rather than a mistake in judgment, and was due to an unintentional and

- substantial error in arithmetic or an unintentional omission of a substantial quantity of work, labor, or material;
  - (3) the bid was submitted in good faith; and
  - (4) the Bidder provides written notice to the Owner, to the attention of the Owner's Representative, within two (2) business days after the bid opening for which the right to withdraw is claimed.
- b. No bid may be withdrawn under this provision if the result would be the awarding of the contract on another bid for the bid package from which the Bidder is withdrawing its bid to the same Bidder.
  - c. If a bid is withdrawn under this provision, the Owner may award the Contract to another Bidder determined by the Owner to be the lowest and best bidder or the Owner may reject all bids and advertise for other bids. In the event the Owner advertises for other bids, the withdrawing Bidder shall pay the costs incurred in connection with the rebidding by the Owner, including the cost of printing new Contract Documents, required advertising, and printing and mailing notices to prospective bidders, if the Owner finds that such costs would not have been incurred but for such withdrawal.

S. COMPLIANCE WITH APPLICABLE LAWS

- 1. By submitting a bid for Work on the Project, the Bidder acknowledges that it is in compliance with applicable federal, state, and local laws and regulations, including, but not limited to, the following:
  - a. Equal Employment Opportunity/Nondiscrimination. The Bidder agrees that if it is awarded a contract that in the hiring of employees for performance of work under the contract or any subcontract, neither it nor any subcontractor, or any person acting on its behalf or its subcontractor's behalf, by reason of race, creed, sex, disability as defined in Section 4112.01 of the Ohio Revised Code, or color, shall discriminate against any citizen of the state in the employment of labor or workers who are qualified and available to perform work to which the employment relates. The Bidder further agrees that neither it nor any subcontractor or any person on its behalf or on behalf of any subcontractor, in any manner, shall discriminate against or intimidate any employees hired for the performance of the work under the contract on account of race, creed, sex, disability as defined in Section 4112.01 of the Ohio Revised Code, or color.
  - b. Ethics Laws. The Bidder represents that it is familiar with all applicable ethics law requirements, including without limitation Sections 102.04 and 3517.13 of the Ohio Revised Code, and certifies that it is in compliance with such requirements.

T. FINDINGS FOR RECOVERY

- 1. By submitting its bid, each Bidder certifies for reliance of the Owner that it has no unresolved finding for recovery against it issued by the Auditor of the State of Ohio on or after January 1, 2001, except as permitted by Section 9.24 (F) of the Ohio Revised Code.

U. PREVAILING WAGES

1. The successful Bidder and all of its subcontractors, regardless of tier, will strictly comply with its obligation to pay a rate of wages on the Project not less than the rate of wages fixed for this Project under Section 4115.04 of the Ohio Revised Code. Additionally, the successful Bidder will comply with all other provisions of Chapter 4115 of the Ohio Revised Code.

END OF INSTRUCTIONS TO BIDDERS

BID FORM

1.1 BID SUBMITTED BY:

\_\_\_\_\_ (Contractor)

Date bid submitted: \_\_\_\_\_

1.2 DELIVER TO:

Fairfield County Board of Developmental Disabilities  
ATTN: Todd McCullough  
795 College Avenue  
Lancaster, Ohio 43130

1.3 Having carefully reviewed the Instructions to Bidders, Drawings, Specifications and other Contract Documents for the Project titled Forest Rose School HVAC Improvements Project including having also received, read, and taken into account the following Addenda:

Addendum No.	Dated
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

and likewise having inspected the site and the conditions affecting and governing the Project, the undersigned hereby proposes to furnish all materials and to perform all labor, as specified and described in the said Specifications and/or as shown on the said Drawings for all Work necessary to complete the Project on a timely basis and in accordance with the Contract Documents regardless of whether expressly provided for in such Specifications and Drawings.

1.4 Before completing the Bid Form, the undersigned represents that it has carefully reviewed the Request for Bids, Instructions to Bidders, this Bid Form, Form of Bid Guaranty and Contract Bond, Contractor’s Affidavit (O.R.C. 5719.042), Owner-Contractor Agreement, Drawings, Project Specifications, and other Contract Documents. Failure to comply with provisions of the Contract Documents may be cause for disqualification of the bid.

1.5 BONDS AND CONTRACT: If the undersigned is notified of bid acceptance, it agrees to furnish required bonds as indicated in the Instructions to Bidders.

1.6 COMPLETION OF WORK: In submitting a bid, the undersigned agrees to execute the Owner- Contractor Agreement in the form included in the Contract Documents and to complete its Work as required by the Contract Documents.

NOTE A: The wording of the Bid Form shall be used throughout, without change, alteration, or addition. Any change may cause it to be rejected.

NOTE B: Bidder is cautioned to bid only on the Brands or Standards specified.

NOTE C: If there is an inconsistency or conflict in the Bid amount, the lowest amount shall control, whether expressed in numbers or words.

2.1 BID:

Include the cost of all labor and material for the contract listed below. Bidder is to fill in all blanks related to the Bid Package for which a bid is being submitted. If no bid is submitted for an item, leave the item blank or insert "NO BID" in the blank. For alternate items, indicate whether the amount stated is in addition to or a deduction from the base bid amount (if there is no indication whether the amount for an alternate is an addition or a deduction, the amount shall be a deduction).

2.2 Bidder will complete the Work in accordance with the Owner's Program of Requirements Contract Documents for the following price(s):

Base Bid (All work listed in the OPR/Drawings and Specifications but not including Alternates) will be provided for the following:

\_\_\_\_\_ Dollars (\$ \_\_\_\_\_)  
(Words) (Figures)

3.1 INSTRUCTIONS FOR SIGNING

- A. The person signing for a sole proprietorship must be the sole proprietor or his authorized representative. The name of the sole proprietor must be shown below.
- B. The person signing for a partnership must be a partner or his authorized representative.
- C. The person signing for a corporation must be the president, vice president or other authorized representative; or he must show authority, by affidavit, to bind the corporation.
- D. The person signing for some other legal entity must show his authority, by affidavit, to bind the legal entity.

4.1 BIDDER CERTIFICATIONS. The Bidder hereby acknowledges that the following representations in this bid are material and not mere recitals:

- 1. The Bidder acknowledges that this is a public project involving public funds, and that the Owner expects and requires that each successful Bidder adhere to the highest ethical and performance standards. The Bidder by submitting its bid pledges and agrees that (a) it will act at all times with absolute integrity and truthfulness in its dealings with the Owner and the Design Professional, (b) it will use its best efforts to cooperate with the Owner and the Design Professional and all other Contractors on the Project and at all times will act with professionalism and dignity in its dealings with the Owner, Design Professional and other Contractors, (c) it will assign only competent supervisors and workers to the Project, each of whom is fully qualified to perform the tasks that are assigned to him/her, and (d) it has read, understands and will comply with the terms of the Contract Documents.

2. The Bidder represents that it has had a competent person carefully and diligently review each part of the Contract Documents, including any Divisions of the Specifications and parts of the Drawings that are not directly applicable to the Work on which the Bidder is submitting its bid. By submitting its bid, each Bidder represents and agrees, based upon its careful and diligent review of the Contract Documents, that it is not aware of any conflicts, inconsistencies, errors or omissions in the Contract Documents for which it has not notified the Design Professional in writing at least seven (7) days prior to the bid opening. If there are any such conflicts, inconsistencies, errors or omissions in the Contract Documents, the Bidder (i) will provide the labor, equipment or materials of the better quality or greater quantity of Work; and/or (ii) will comply with the more stringent requirements. The Bidder will not be entitled to any additional compensation for any conflicts, inconsistencies, errors or omissions that would have been discovered by such careful and diligent review, unless it has given such prior written notice to Design Professional.
3. The Bidder represents that it has had a competent person carefully and diligently inspect and examine the entire site for the Project and the surrounding area, including all parts of the site applicable to the Work for which it is submitting its bid, and carefully correlate the results of the inspection with the requirements of the Contract Documents. The Bidder agrees that its bid shall include all costs attributable to site and surrounding area conditions that would have been discovered by such careful and diligent inspection and examination of the site and the surrounding area, and the Bidder shall not be entitled to any Change Order, additional compensation, or additional time on account of conditions that could have been discovered by such an investigation.
4. The Bidder represents, understands and agrees that a) the Claim procedures in the General Conditions as modified for the Project are material terms of the Contract Documents, b) if it has a Claim, it will have its personnel provide complete and accurate information to complete and submit the Statement of Claim form on a timely basis, c) the proper completion and timely submission of a Statement of Claim form is a condition precedent to any change in the Contract Sum or the Contract Time(s), and d) the proper and timely submission of the Statement of Claim form provides the Owner and the Design Professional with necessary information so that the Owner may investigate the Claim and mitigate its damages.
5. The Bidder represents that the bid contains the name of every person interested therein and is based upon the Standards specified by the Contract Documents.
6. The Bidder and each person signing on behalf of the Bidder certifies, and in the case of a bid by joint venture, each member thereof certifies as to such member's entity, under penalty of perjury, that to the best of the undersigned's knowledge and belief: (a) the Base Bid, any Unit Prices and any Alternate bid in the bid have been arrived at independently without collusion, consultation, communication or agreement, or for the purpose of restricting competition as to any matter relating to such Base Bid, Unit Prices or Alternate bid with any other Bidder; (b) unless otherwise required by law, the Base Bid, any Unit Prices and any Alternate bid in the bid have not been knowingly disclosed by the Bidder and will not knowingly be disclosed by the Bidder prior to the bid opening, directly or indirectly, to any other Bidder who would have any interest in the Base Bid, Unit Prices or Alternate bid; (c) no attempt has been made or will be made by the Bidder to induce any other Person to submit or not to submit a bid for the purpose of restricting

competition; and (d) the statements made in this Bid Form are true and correct.

7. The Bidder will execute the form of Owner/Contractor Agreement in the form included with the Contract Documents, if a Contract is awarded on the basis of this bid, and if the Bidder does not execute the Contract Form for any reason, other than as authorized by law, the Bidder and the Bidder's Surety are liable to the Owner.
8. The Bidder certifies that the upon the award of a Contract, the Contractor will ensure that all of the Contractor's employees, while working on the Project site, will not purchase, transfer, use or possess illegal drugs or alcohol or abuse prescription drugs in any way.
9. The Bidder agrees to furnish any information requested by the Design Professional or the Owner's authorized representative to evaluate that the Bidder has submitted the lowest responsible bid and that the bid is responsive to the specifications.
10. The Bidder certifies that it has no unresolved findings for recovery issued by the Auditor of State.
11. The Bidder certifies that it is aware of and in compliance with the requirements of Ohio Revised Code Section 3517.13 regarding campaign contributions.
12. The Bidder further states that it is a duly licensed contractor, for the type of work proposed, in accordance with the local requirements, and that all fees, permits, etc., pursuant to submitting this Bid have been paid in full.

LEGAL NAME OF BIDDER: \_\_\_\_\_

BIDDER IS (check one): \_\_\_\_\_ sole proprietorpartnership \_\_\_ corporation \_\_\_ other legal entity

NAME & TITLE OF PERSON LEGALLY AUTHORIZED TO BIND BIDDER TO A CONTRACT:

\_\_\_\_\_ Name Title

DATE SIGNED: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

When the Bidder is a partnership or a joint venture, state name and address of each partner in the partnership or participant in the joint venture below:

\_\_\_\_\_  
\_\_\_\_\_  
Name

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Address

\_\_\_\_\_  
\_\_\_\_\_  
Name

\_\_\_\_\_  
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Address

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Name

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Address

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\_\_\_\_\_  
Name

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Address

END OF SECTION

# CONTRACTOR QUALIFICATIONS STATEMENT

SUBMITTED TO: Fairfield County Board of Commissioners

SUBMITTED BY: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Principal Office: \_\_\_\_\_

- Indicate the form of organization:
- Corporation
  - Partnership
  - Individual
  - Joint Venture
  - Other

NAME OF PROJECT: **Forest Rose HVAC Improvements 2026** Project for the Fairfield County Board of Developmental Disabilities

Complete the following information. Attach additional sheets as needed to provide the requested information.

## 1. ORGANIZATION

1.1 How many years has your organization been in business as a Contractor? \_\_\_\_\_

1.2 How many years has your organization been in business under its present business name? \_\_\_\_\_

1.2.1 Under what other or former names has your organization operated?

\_\_\_\_\_  
\_\_\_\_\_

1.3 If your organization is a corporation, answer the following:

1.3.1 Date of incorporation: \_\_\_\_\_

1.3.2 State of incorporation: \_\_\_\_\_

1.3.3 President's name: \_\_\_\_\_

1.3.4 Vice President's name(s): \_\_\_\_\_

1.3.5 Secretary's name: \_\_\_\_\_

1.3.6 Treasurer's name: \_\_\_\_\_

1.4 If your organization is a partnership, answer the following:

1.4.1 Date of organization: \_\_\_\_\_

1.4.2 Type of partnership (if applicable): \_\_\_\_\_

1.4.3 Name(s) of general partner(s): \_\_\_\_\_

1.5 If your organization is individually owned, answer the following:

1.5.1 Date of organization: \_\_\_\_\_

1.5.2 Name of owner: \_\_\_\_\_

1.6 If the form of your organization is other than those listed above, describe it and name the principals:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. LICENSING

2.1 List jurisdictions and trade categories in which your organization is legally qualified to do business, and indicate registration or license numbers, if applicable.

\_\_\_\_\_  
\_\_\_\_\_

2.2 List jurisdictions in which your organization’s partnership or trade name is filed.

\_\_\_\_\_  
\_\_\_\_\_

3. EXPERIENCE

3.1 List the categories of work that your organization normally performs with its own forces.

\_\_\_\_\_

3.2 Claims and Lawsuits (If the answer to any of the questions below is yes, please attach details.)

3.2.1 Has your organization ever failed to complete any work? \_\_\_\_\_

3.2.2 Within the last five (5) years has your organization or any of its officers initiated any Claims, had any Claims initiated against it or them, or been involved in or is currently involved in any mediation or arbitration proceedings or lawsuits suits related to any construction project, or has any judgments or awards outstanding against it or them? \_\_\_\_\_

\_\_\_\_\_ If the answer is yes, please attach the details for each Claim, including the names and telephone numbers of the persons who are parties, the amount of the Claim, the type of Claim and basis for the Claim, and the outcome.

Note: As used in this document “Claim” means a Claim initiated under the Contract Documents for a project.

3.3 Within the last five years, has any officer or principal of your organization ever been an officer or principal of another organization when it failed to complete a construction contract?

\_\_\_\_\_  
If the answer is yes, please attach details for each instance, including the names and telephone numbers of the persons who are parties to the contract, and the reason(s) the contract was not completed.

3.4 On a separate sheet, list construction projects your organization has in progress with an original Contract Sum of more than \$100,000.00, giving the name of project, owner and its telephone number, design professional and its telephone number, contract amount, percent complete and

scheduled completion date.

3.4.1 State total amount of work in progress and under contract: \$\_\_\_\_\_

3.5 Provide the following information for each contract your organization has had during the last 5 years, including current contracts, where the Contract Sum is 50% or more of the bid amount for this Project, including add alternates. If there are more than 10 of these contracts only provide information on the most recent 10 contracts, including current contracts.

Project And Work	Contract Sum	Owner's Representative & Telephone Number	Engineer's or Architect's Representative Name & Telephone Number

3.5.1 Provide the following information for each project your organization has had during the last 5 years, which your organization believes is of comparable or greater size and complexity than the Owner's project. If there are more than 5 of these projects, only provide information on the most recent 5 projects, including current projects.

Project And Work	Contract Sum	Owner's Representative & Telephone Number	Engineer's or Architect's Representative Name & Telephone Number

3.5.2 State average annual amount of construction work your organization has performed during the last five years. \$ \_\_\_\_\_

3.5.3 If any of the following members of your organization's management--president, chairman of the board, or any director--operates or has operated another construction company during the last 5 years, identify the member of management and the name of the construction company.

\_\_\_\_\_

\_\_\_\_\_

3.5.4 If your organization is operating under a trade name registration with the Secretary of State for the State of Ohio, identify the entity for which the trade name is registered. If none, state "none."

\_\_\_\_\_

3.5.5. If your organization is a division or wholly-owned subsidiary of another entity or has another relationship with another entity, identify the entity of which it is a division or wholly-owned subsidiary or with which it has another relationship and also identify the nature of the relationship. If none, state "not applicable."

\_\_\_\_\_

3.6 On a separate sheet, list the construction education, training and construction experience for each person who will fill a management role on the Project, including without limitation the Project Executive, Project Engineer, Project Manager, and Project Superintendent. For each person listed, include with the other information the last three projects on which the person worked and the name and telephone number of the Design Professional and the Owner.

4. REFERENCES

4.1 Trade References: \_\_\_\_\_  
\_\_\_\_\_

4.2 Bank References: \_\_\_\_\_  
\_\_\_\_\_

4.3 Surety:

4.3.1 Name of bonding company: \_\_\_\_\_

4.3.2 Name and address of agent: \_\_\_\_\_  
\_\_\_\_\_

5. FINANCING

5.1 Financial Statement

5.1.1 Attach a financial statement, preferably audited, including your organization's latest balance sheet and income statement showing the following items:

- Current Assets (e.g., cash, joint venture accounts, accounts receivable, notes receivable, accrued income, deposits, materials inventory and prepaid expenses);
- Net Fixed Assets;
- Other Assets;
- Current Liabilities (e.g., accounts payable, notes payable, accrued expenses, provision for income taxes, advances, accrued salaries and accrued payroll taxes); and
- Other Liabilities (e.g., capital, capital stock, authorized and outstanding shares par values, earned surplus and retained earnings).

5.1.2 Name and address of firm preparing attached financial statement, and date prepared:  
\_\_\_\_\_  
\_\_\_\_\_

5.1.3 Is the attached financial statement for the identical organization named on page one?  
\_\_\_\_\_

5.1.4 If not, explain the relationship and financial responsibility of the organization whose financial statement is provided (e.g., parent-subsiary). \_\_\_\_\_  
\_\_\_\_\_

5.2 Will the organization whose financial statement is attached act as guarantor of the contract for construction? \_\_\_\_\_

Certification. The undersigned certifies for the reliance of the Owner that after diligent investigation, to the best of the undersigned's belief, the information provided with this Contractor Qualifications Statement is true, accurate and not misleading.

SIGNATURE

Dated at this \_\_\_\_ day of \_\_\_\_\_, 20\_\_ .

Name of Organization: \_\_\_\_\_

By: \_\_\_\_\_ [PRINT NAME]

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

STATE OF OHIO,  
County of \_\_\_\_\_, ss:

\_\_\_\_\_, being duly sworn, deposes and says that the information provided herein is true and sufficiently complete so as not to be misleading.

Subscribed and sworn before me this \_\_\_\_ day of \_\_\_\_\_ 20\_\_.

\_\_\_\_\_  
Notary Public

My Commission Expires: \_\_\_\_\_

SEAL



CONTRACTOR'S PERSONAL PROPERTY TAX  
AFFIDAVIT  
(O.R.C. § 5719.042)

State of Ohio  
County of \_\_\_\_\_, ss:

\_\_\_\_\_, being first duly sworn, deposes and says that he is the  
(Name)

\_\_\_\_\_ of \_\_\_\_\_ with offices located at  
(Title) (Contractor)

\_\_\_\_\_, and as its duly  
(Address of Contractor)

authorized representative, states that effective this \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_,

\_\_\_\_\_  
(Name of Contractor)

( ) is charged with delinquent personal property taxes on the general list of personal property as set forth below:

<u>County</u>	<u>Amount</u> (include total amount penalties and interest thereon)
_____ County	\$ _____
_____ County	\$ _____
_____ County	\$ _____

( ) is not charged with delinquent personal property taxes on the general list of personal property in any Ohio county.

\_\_\_\_\_  
(Affiant)

Sworn to and subscribed before me by the above-named affiant this \_\_\_\_\_ day of \_\_\_\_\_, 20 \_\_. The notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with regard to the notarial act certified to hereby.

\_\_\_\_\_  
(Notary Public)

My commission expires  
\_\_\_\_\_, 20\_\_

SHORT FORM OWNER-CONTRACTOR  
AGREEMENT FOR PROJECTS OF LIMITED SCOPE

Owner:

Fairfield County Board of Commissioners  
210 E. Main Street, #301, Lancaster, Ohio 43130

Project: Forest Rose School HVAC Improvements 2026 Project

Location: Fairfield County Board of Developmental Disabilities  
795 College Avenue, Lancaster, Ohio 43130

Contractor: \_\_\_\_\_

Contact: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Owner, a political subdivision of the State of Ohio, and Contractor have entered into this Owner-Contractor Agreement (“Agreement”) as of the date signed by Owner (“Effective Date”). The Project consists of, but is not limited to, the renovation of the Fairfield County Board of Developmental Disabilities Administration Building and the replacement of existing water source heat pump equipment located in Forest Rose School located, 795 College Avenue, Lancaster, Ohio 43130, which includes HVAC work (the “Project”).

The Project Owner and Contractor agree as follows:

1. WORK.

- 1.1. Contractor will furnish all the labor, services, materials, plant, equipment, tools, scaffolds, appliances, and all other things (collectively called the “Work”) necessary for the timely and proper completion of the Project.
- 1.2. Contractor must at all times furnish sufficient skilled workers, materials, and equipment to perform the Work in strict conformance with the Contract Documents and to the entire satisfaction of Owner, so as to complete the Project by the Date for Substantial Completion. All materials and equipment provided must be new, free from all defects, fit for the purpose for which intended, and merchantable.
- 1.3. Contractor will assign a competent Project Supervisor. At the Owner’s request, Contractor will replace the Project Supervisor, provided that the request is reasonable. Owner will not be responsible for the acts or omissions of the Project Supervisor or his assistants.
- 1.4. Contractor shall be responsible for cutting, fitting, or patching required to complete the Work or it make its parts fit together properly.

2. CONTRACT DOCUMENTS.

- 2.1. The Contract Documents consist exclusively of the following documents incorporated by reference:
  - A. Public Notice;
  - B. Instructions to Bidders;
  - C. Bid Form;

- D. Owner-Contractor Agreement, including all exhibits attached hereto.
  - E. Owner's Program of Requirements prepared by CountyFirm, dated January 5, 2026.
  - F. Executed Bid Guaranty and Contract Bond.
  - G. Sales & Use Tax/ Construction Contract Exemption Certificate.
  - H. Statement of Claim Form.
  - I. Design Professional's Certificate of Substantial Completion.
  - J. Contractor's Affidavit of Payment or Amounts Withheld.
  - K. Contractor Waiver and Release Affidavit.
  - L. Subcontractors/ Suppliers Waiver and Release Affidavit.
  - M. Contractor's Final Lien Waiver and Release Affidavit.
  - N. Subcontractors/ Suppliers Final Lien Waiver and Release Affidavit.
  - O. Pre-Bid Substitution Form.
  - P. Addenda issued.
  - Q. Executed Contractor's Personal Property Tax Affidavit (O.R.C. 5719.042);
  - R. Modifications issued after the execution of the contract, including:
    - a. A written amendment to the Agreement signed by both parties.
    - b. A Change Order; or
    - c. A Construction Change Directive
  - S. Prevailing Wage Rates
- 2.2. Contractor will use the State of Ohio Subcontract Form for all subcontracted Work, in accordance with ORC Section 153.503(C) and OAC Section 153:1-3-02.
- 2.3. Unless otherwise stated in the Contract Documents, words that have well-known technical or construction industry meanings are used in the Contract Documents in accordance with such recognized meanings. Days shall mean calendar days unless noted otherwise.
3. OWNER REPRESENTATIVE AND DESIGN PROFESSIONAL.
- 3.1. Design Professional. The Design Professional for this Project is CountyFirm. The Design Professional prepared the drawings and specifications for the Work. The Design Professional will also provide construction administration services for the Project. The Contractor will coordinate with the Design Professional, as instructed by the Owner.
- 3.2. Todd McCullough, Director of Operations for the Fairfield County Board of Developmental Disabilities, is the Owner's Representative with respect to all matters involving Owner.
- 3.2.1. Except as specifically stated to the contrary elsewhere in this Agreement, Contractor will direct all communications to Owner through the Owner's Representative.
- 3.3. Contractor will coordinate the Work with the Owner and Owner's separate contractors, consultants, or other agents. Contractor will provide access to the Work at all times.
- 3.3.1. TIME FOR COMPLETION AND PROJECT COORDINATION. Contract Time. The Work shall commence as of the Effective Date of this Agreement (the "Date of Commencement"), with all associated Work being completed on or before August 1, 2026 (the "Date for Substantial Completion")., substantial Completion. Substantial Completion is the stage in the progress of the Work when the Work or designated portion thereof is sufficiently complete in accordance with the Contract Documents so that the Owner can occupy or utilize the Work for its intended use. Notwithstanding anything in the Contract Documents to the contrary, this shall include, but is not limited to, start up and successful testing of all systems and equipment.

3.3.2. Following Substantial Completion of the Work or a designated portion thereof, as certified by the Design Professional on the Certificate of Substantial Completion (Exhibit D) or confirmed by the Owner, and Owner's receipt of consent of the Contractor's surety, if any, the Owner shall make a payment of retainage applying to such Work. Such payment shall be adjusted for Work that is incomplete or not in accordance with the requirements of the Contract Documents. The Owner is entitled to withhold 200% of the value of such incomplete or nonconforming Work.

3.3.3. Date of Final Completion. Final Completion shall mean that the Work is complete in all respects in accordance with the Contract Documents and the Contractor has submitted to the Owner all required documents. The date of Final Completion shall be within 21 calendar days from the Date of Substantial Completion.

3.4. Time is of the Essence. THE DATES IN THE CONTRACT DOCUMENTS ARE OF THE ESSENCE OF THIS AGREEMENT. CONTRACTOR WILL PROSECUTE ITS WORK IN ACCORDANCE WITH THE CONTRACT DOCUMENTS, INCLUDING ANY AMENDMENTS THERETO.

### 3.5. Contractor's Construction and Submittal Schedules

3.5.1. The Contractor shall prepare for Owner's review and approval the construction schedule ("Construction Schedule") and a corresponding detailed schedule of values pursuant to the Ohio Revised Code Section 153.13 within seven (7) calendar days after the Effective Date. The schedule of values must be broken out into labor and materials for each line item. The Contractor shall prepare the Construction Schedule in Critical Path Method ("CPM") format unless provided otherwise in the Contract Documents or otherwise in writing by the Owner. Each major category of Work shall be shown separately in the Construction Schedule with all the significant activities involved, showing durations of time, manpower requirements, and restraints. The Construction Schedule is for the purpose of coordinating the timing, phasing, and sequence of the Work of the Contractor and shall not change or modify the Date for Substantial Completion. The Date for Substantial Completion shall only be changed or modified by Change Order, other Modification, or a Claim that is Finally Resolved, regardless of the dates in the Construction Schedule.

3.5.1.1. The Contractor shall update the Construction Schedule each month;

3.5.1.2. The Construction Schedule shall be manpower loaded;

3.5.1.3. The Contractor shall, on a weekly basis, prepare and submit to the Owner a written report describing the activities begun or finished during the preceding week, Work in progress, expected completion of the Work, a look-ahead projection of all activities to be started or finished in the upcoming two (2) weeks, including without limitation the Contractor's workforce crew size and total resource hours associated with such Work and any other information requested;

3.5.1.4. The float in the Construction Schedule and any updates to it shall belong to the Owner. Float shall mean the amount of time by which activities may be delayed without affecting the Date for Substantial Completion; and

3.5.1.5. The Contractor's obligation to submit requested scheduling information is a

material term of its Contract. If the Contractor fails to submit requested scheduling information in writing within five (5) days of a request for such information from the Owner, the Contractor shall pay and the Owner may withhold from the Contractor Liquidated Damages at the rate of Fifty Dollars (\$50.00) a day for each calendar day thereafter that the Contractor fails to submit the requested information.

3.5.2. The Contractor shall perform the Work in accordance with the most recent Construction Schedule submitted to the Owner, provided that the Contractor shall comply with any orders under Section 4.3.3. However, preparation of such schedule shall not constitute a waiver of the Owner's rights under the Contract to have the Work completed by the Date for Substantial Completion.

3.5.3. If the Owner determines that the performance of the Work has not progressed so that it is likely that the Contractor will not achieve Substantial Completion of its Work by the Date for Substantial Completion, the Owner shall have the right to order the Contractor to take corrective measures necessary to expedite the Work, including, without limitation: (i) working additional shifts or overtime; (ii) supplying additional manpower, equipment, and facilities, and (iii) other similar measures ("Corrective Measures"). If the Owner orders the Contractor to take such corrective measures, the Contractor shall take and continue such Corrective Measures until the Owner is satisfied that the Contractor is likely to achieve Substantial Completion of its Work by its Date for Substantial Completion.

3.5.3.1. The Contractor shall not be entitled to adjustment in the Contract Sum in connection with the Corrective Measures required by the Owner pursuant to this Section 4.3.3, unless the Contractor is able to establish that it is entitled to additional compensation under the terms of the Contract Documents.

### 3.6. Delays and Accelerations.

3.6.1. Notice of Delays. Contractor will give Owner written notice of any delay affecting its Work in the form and with the information specified in the Contract Documents within forty-eight (48) hours of the commencement of the delay; provided that the 48-hour notice will be extended to ten (10) days for unusually severe weather conditions not reasonably anticipatable. The failure to give the required notice constitutes an irrevocable waiver of Contractor's right to seek an extension of time and/or additional compensation/damages for the delay.

3.6.2. Acceleration of the Work. Owner may require Contractor to accelerate its Work by adding workers or working additional shifts, extended shifts or overtime, so that the Work is in final form before the Date for Substantial Completion. If Owner requires Contractor to accelerate its Work, Contractor will within five (5) days take the required action, and Owner thereafter will issue a Change Order increasing the Contract Sum to pay for Contractor's additional costs of accelerating its Work so that the Work is in final form before the Date for Substantial Completion. If there is a dispute as to whether Contractor is entitled to a Change Order for accelerating its Work, Contractor must proceed to accelerate its Work without waiting for a Change Order or payment of any additional compensation, but may reserve its right to make a claim against Owner for its additional costs incurred in accelerating its Work. Contractor's additional costs for accelerating its Work will be determined in accordance with Section 4.4.3.

### 3.6.3. Compensation for Acceleration of the Work.

3.6.3.1. Owner's Obligation to Pay. When Owner initiates the acceleration of the Work, Owner will pay Contractor, as provided in Section 4.4.3.2, for Contractor accelerating its Work so that its Work is substantially complete by the Date for Substantial Completion. However, when Contractor's Work is ordered to be accelerated as a result of Contractor's own fault or the fault of its subcontractors or suppliers, Owner will not pay Contractor for such acceleration.

3.6.3.2. Compensation for Acceleration of the Work. To the extent that Owner requires Contractor to accelerate its Work so that the Work is in final form before the Date for Substantial Completion, Owner will pay Contractor for Contractor's reasonable additional costs of accelerating its Work, as determined in accordance with this section. The additional costs of accelerating the Work will be (a) any premium for overtime, additional shift work, or extended shift work, (b) the cost of any additional supervision or general conditions required by the acceleration, (c) out of pocket cost of any additional equipment required for the acceleration, (d) to the extent Contractor can document lost productivity due to the acceleration, the cost associated with such lost productivity, and (e) overhead, including home office overhead, and profit equal to 10% of the total amount of the other items for which additional compensation is permitted under this section. The foregoing are the only additional compensation and/or damages Contractor will be entitled to receive for accelerating its Work so that it is complete before the Date for Substantial Completion. As a condition precedent to its recovery of additional compensation, Contractor must provide Owner with full information about the costs of accelerating its Work in the form and format requested by Owner.

## 4. CORRECTIVE ACTION.

4.1. If Owner determines that Contractor is in default by not cooperating or coordinating its Work properly with its subcontractors, not supplying sufficient skilled workers, not cleaning up the Project, not furnishing the necessary materials, equipment, or any temporary services or facilities to perform the Work in strict conformance with the Contract Documents, or Contractor is not on schedule, or is not otherwise performing its obligations under the Contract Documents, CONTRACTOR MUST WITHIN TWO (2) BUSINESS DAYS AFTER NOTICE OF SUCH DETERMINATION, (1) COMMENCE SUCH ACTION AS IS NECESSARY TO CORRECT THE DEFICIENCIES NOTED BY OWNER, (2) PROCEED TO CORRECT SUCH DEFICIENCIES WITHIN FIFTEEN (15) DAYS OF SUCH NOTICE OR, (3) IF OWNER INSTRUCTS CONTRACTOR TO TAKE URGENT CORRECTIVE ACTION TO PROTECT PERSONS OR PROPERTY, IMMEDIATELY TAKE SUCH CORRECTIVE ACTION, including but not limited to increasing the number of skilled workers, providing temporary services or facilities, and cleaning up the Project. Such corrective action shall be taken and continued without interruption and without waiting to initiate any dispute under this Agreement or the resolution of any dispute initiated under this Agreement. Failure to comply with this provision shall be an additional default.

## 5. COMPENSATION.

5.1. Contract Sum. The Contract Sum to be paid by Owner to Contractor, as provided herein, for the satisfactory performance and completion of the Work and all of the duties,

obligations and responsibilities of

Contractor under this Agreement and the other Contract Documents is Contract Sum includes the following:

Base Bid Amount: \$ [redacted] (Lump Sum Bid)

The Base Bid does not include any Unit Prices and that the Unit Prices will only be used if the Work included in the Unit Prices is required during the Project; and

5.1.1. Accepted Alternates, included in the Contract Sum (None if none listed): XXX Allowances included in the Contract Sum (None if none listed): None

All Allowances shall be included in the schedule of values. With each Application for Payment, the Contractor shall include the balance of any Allowances and how the Allowances have been expended to date. The Contractor will obtain approval from the Owner prior to incurring any costs in excess of an Allowance; any approved cost in excess of an Allowance will be documented by a Change Order signed by both parties. Before final payment, an appropriate Change Order will be issued to reconcile the Contract Sum so that it reflects actual amounts due to the Contractor on account of Work covered by Allowances. Remaining Allowances amounts not due to the Contractor on account of Work covered by the Allowances shall be retained by the Owner.

5.1.2. Unit Prices - If directed by the Design Professional, such Work will be paid for in accordance with the Unit Prices bid and identified below (None if not listed):

5.2. The Contract Sum includes all federal, state, county, municipal, and other taxes imposed by law, including but not limited to any sales, use, and personal property taxes payable by or levied against Contractor on account of the Work or the materials incorporated into the Work. Contractor is responsible to pay any such taxes.

5.3. The Contract Sum includes fees and costs for any required building permit as well as other permits, fees, licenses, and inspections by government agencies necessary for proper execution and completion of the Work that are customarily secured after execution of the Contract and legally required at the time negotiations are concluded. Contractor is responsible to secure any such permits, fees, licenses, and inspections.

5.4. Liquidated Damages.

5.4.1. Contractor must achieve Substantial Completion by the date stated in Section 4.1. By entering into this Agreement, Contractor agrees that the period for performing the Work is reasonable and that Contractor can achieve Substantial Completion by the date stated in this Agreement.

5.4.2. If Contractor does not achieve Substantial Completion of its Work on the Project by the Date for Substantial Completion stated in Section 4.1, Contractor shall pay the Owner (and the Owner may set off from sums coming due Contractor) liquidated damages in the per diem amount stated in the following chart for each calendar day beyond the Date for Substantial Completion, as may be modified in accordance with the Contract Documents, that the Contractor fails to achieve Substantial Completion.

Contract Sum Amount                      Dollars Per Day

\$0.01 to \$50,000.00	\$100.00
\$50,000.01 to \$150,000.00	\$200.00
\$150,000.01 to \$500,000.00	\$300.00
\$500,000.01 to \$750,000.00	\$400.00
\$750,000.01 to \$1,000,000.00	\$500.00
\$1,000,000.01 to \$2,000,000.00	\$700.00
More than \$2,000,000.01	\$1,000.00

5.4.3. Contractor acknowledges by signing this Agreement with Owner that the amount of liquidated damages represent a reasonable estimate of the actual damages Owner would incur if the Work is not substantially complete by the foregoing date and that the damages that may result from the failure to substantially complete the work by the foregoing date are uncertain and difficult to ascertain. No waiver of consequential damages shall preclude the Owner from recovering liquidated damages.

5.4.4. Nothing in this Section 6.4 shall preclude the Owner from recovering its actual damages from the Contractor for third-party claims against the Owner or damages not associated with delay.

## 6. PAYMENT AND RETAINAGE.

### 6.1. Payment.

6.1.1. Applications for Payment. Payment applications shall be submitted on a monthly basis and shall reflect the amount of Work completed as of the date the application for payment is submitted consistent with the schedule of values. Payment applications must be received by the Owner not later than the fifteenth (15th) day of the month; payment applications received after the 15th day of the month will be deemed to be received in the following month and will be held for payment during the following payment period. With each application for payment the Contractor shall submit one copy of the following documentation:

- (a) Invoice for Work performed and materials and equipment provided for the previous pay period;
- (b) If required for the Project, the Certified Payroll Report for payment of prevailing wages (Exhibit J);
- (c) Lien waivers from itself and all subcontractors, suppliers, and any other party that performed Work or supplied materials for the Project in a form acceptable to the Owner for the Work performed during the current billing period (Exhibits E through I);
  - a. Exhibit E shall be submitted with each Application for Payment starting with the second Application for Payment;
  - b. Exhibits F and G shall be submitted with each Application for Payment; and,
  - c. Exhibits H and I shall be submitted with the Application for Final Payment.
- (d) Such other supplemental information as the Owner may require. Such other

information may include a schedule of all materials and equipment stored on site.

- 6.1.2. Owner may withhold payment in whole or in part, and may demand that Contractor refund amounts previously paid, to protect Owner from loss because of:
- (a) Contractor's default or failure to perform any of its obligations under the Contract Documents, including but not limited to: failure to provide sufficient skilled workers; Work, including equipment or materials, which is defective or otherwise does not conform to the Contract Documents; failure to conform to the Contract Time or Construction Schedule; and failure to follow the directions of or instructions from Owner;
  - (b) Contractor's default or failure to perform any of its obligations under another contract that it has with Owner;
  - (c) The filing of third party claims, or reasonable evidence that third party claims have been or will be filed;
  - (d) The Work has not proceeded to the extent set forth in the application for payment;
  - (e) Any representations made by Contractor are untrue;
  - (f) The failure of Contractor to make payments to its Subcontractors;
  - (g) Damage to Owner's property or the property of another person or laborer;
  - (h) The determination that there is a substantial possibility that the Work cannot be completed for the unpaid balance of the Contract Sum; and/or
  - (i) Liens filed or reasonable evidence indicating the probable filing of such liens.
- 6.1.3. Owner will pay Contractor within thirty (30) days after receipt of the Contractor's payment application, provided that the payment application has been properly submitted on a timely basis and is accompanied by all of the required documentation. Amounts unpaid after thirty (30) days after Owner's receipt of the payment application shall bear interest at the rate of zero percent (0%).

## 6.2. Retainage.

### 6.2.1. Amount of Retainage.

- 6.2.1.1. Payments for Labor. Payments for labor incorporated into the Work will be at the rate of 92% of the amount set forth in Contractor's payment application and approved by Owner until the Work is 50% complete, unless the parties agree otherwise. When the Work is 50% complete, the payment for labor incorporated into the Work will be at the rate of 100% of the amount set forth in Contractor's payment application and approved by Owner.
- 6.2.1.2. Payments for Materials and Equipment. Payments for materials and equipment will be at the rate of 92% of the invoice cost of materials and equipment delivered to the Project site or other storage site approved by Owner. The balance of the invoice cost will be payable when the materials or equipment are

incorporated into the Work. Incorporated into the Work means such materials and equipment are installed and conform to the requirements of the Contract Documents. When payment is made on account of materials or equipment not yet incorporated into the Project, such materials and equipment will become the property of Owner; provided that if such materials or equipment are stolen, destroyed, or damaged before being fully incorporated into the Project, Contractor shall be required to replace them at its expense.

#### 6.2.2. Interest on Retainage.

6.2.2.1. Contractor agrees that Owner may hold retained amounts in the project construction fund and is not required to deposit the retained funds into a separate interest-bearing savings account. The balance of the retained funds, plus interest, will be paid to Contractor as its final payment for the Project, less any amounts needed to cover damages or costs incurred by Owner related to the Work.

6.2.2.2. In lieu of the provisions of Section 7.2.2.1, the Contractor may request to have the Owner instead deposit the retained funds, when the Work is 50% complete, into a separate escrow account governed by an escrow agreement, employing an escrow agent, by providing written notice to the Owner of the request prior to the submission of the first pay application. If the Contractor so requests, the Contractor will be responsible for all expenses associated with the escrow agent and escrow account beyond the interest income from the account, and the change and expense must be expressly documented in a change to the contract. If the Contractor does not request an escrow account prior to submission of the first pay application, the Contractor will be deemed to have waived its rights under ORC 153.63 to have the retained funds so deposited and governed by an escrow agreement.

6.2.3. Documentation. Upon request, Contractor immediately will supply Owner with requested information so as to verify the amounts due to Contractor, including but not limited to original invoices for materials and equipment and documents showing that Contractor has paid for such materials and equipment, and so as to verify that amounts due laborers, subcontractors, and materialmen have been paid to them.

#### 6.3. Final Payment.

6.3.1. The final application for payment shall be itemized and submitted after completion of the Work specified for the Project. Contractor shall ensure that the final application for payment shall contain one (1) copy of each of the following documents, if not previously delivered to Owner.

- (a) All items required in Section 7.1.1;
- (b) Contractor's Certificate of Insurance;
- (c) Contractor's Workers' Compensation Certificate;
- (d) Consent of Contractor's Surety to Payment;
- (e) An assignment to Owner of all warranties obtained or obtainable by Contractor from

manufacturers and suppliers of equipment and materials incorporated into the Work by written instrument of assignment in a form acceptable to Owner; and

- (f) Such other documentation as required by the Contract Documents, Owner, or applicable law, including but not limited to, the final certified payroll report and required Affidavit of Compliance if Prevailing Wages are required for the Project.

6.3.2. The making of Final Payment by Owner does not constitute a waiver of Claims by Owner for the following:

- (a) Liens, Claims, security interests, or encumbrances arising out of the Contract Documents that are unsettled;
- (b) Failure of the Work to comply with the requirements of the Contract Documents;
- (c) Terms of warranties required by the Contract Documents;
- (d) Claims for Indemnification;
- (e) Claims about which Owner has given Contractor notice; or
- (f) Claims arising after Final Payment.

## 7. CHANGES IN THE WORK.

### 7.1. Change Orders.

7.1.1. A Change Order is a written instrument signed by Owner and Contractor stating their agreement upon a change in the Work, the amount of the adjustment or the method for computing the amount of the adjustment of the Contract Sum, if any, and the extent of the adjustment in the Contract Time, if any.

7.1.2. All Change Orders shall be submitted with any supporting documentation requested by the Owner in advance of the performance of the Work that is the subject of the Change Order and must be approved by the Owner in writing in advance of the performance of the Work that is the subject of the Change Order.

7.1.3. The agreement on any Change Order shall constitute a final settlement of all matters relating to the change in the Work that is the subject of the Change Order, including but limited to all direct, indirect, and cumulative costs that include reasonable overhead and profit associated with such change and any and all adjustments to the Contract Sum and in the Contract Time. Total cumulative overhead and profit for Contractor and all Subcontractors on any add or deduct Change Order shall not exceed 15% of the total cost of labor and material. The Contractor shall not proceed with any change in the Work without a signed Change Order. The Contractor's failure to timely seek and obtain such authorization as specified herein, shall constitute an irrevocable waiver by the Contractor of an adjustment to the Contract Sum or the Contract Time for the related work.

### 7.2. Construction Change Directives.

7.2.1. A Construction Change Directive is a written order prepared and signed by the

Owner, directing a change in the Work prior to agreement on adjustment, if any, in the Contract Sum or Contract Time, or both. The Owner may by Construction Change Directive, without invalidating the Contract, order changes in the Work within the general scope of the Contract consisting of additions, deletions, or other revisions, the Contract Sum and Contract Time being adjusted accordingly.

- 7.2.2. A Construction Change Directive shall be used in the absence of total agreement of a Change Order.
- 7.2.3. Upon receipt of a Construction Change Directive, the Contractor shall promptly proceed with the change in the Work involved and advise the Owner of the Contractor's agreement or disagreement with the method, if any, provided in the Construction Change Directive for determining the proposed adjustment in the Contract Sum or Contract Time.
- 7.2.4. When the Owner and Contractor agree with adjustments in the Contract Sum and Contract Time, such agreement shall be effective immediately, and the Owner will prepare a Change Order. Change Orders may be issued for all or any part of a Construction Change Directive.
- 7.2.5. If the Contractor disagrees with the adjustment in the Contract Time or the Contract Sum, the Contractor may make a Claim in accordance with applicable provisions of Article 9.

## 8. CLAIMS AND DISPUTES.

- 8.1. A Claim is a demand or assertion by one of the parties seeking, as a matter of right, adjustment, or interpretation of the terms of the Contract Documents, payment of money, extension of time, or other relief with respect to the terms of the Contract Documents, provided that Owner's decision to adjust or withhold payment under Section 7.1.2 will not be considered a Claim. The responsibility to substantiate claims shall rest with the party making the Claim. Contractor will not knowingly (as "knowingly" is defined in the federal False Claims Act, 31 U.S.C. Section 3729, et seq.) present or cause to be presented a false or fraudulent Claim. As a condition precedent to making a claim, Contractor must submit a properly completed Statement of Claim Form (Exhibit C).
- 8.2. Subject to the requirements of Article 9, if Contractor wishes to make a Claim for an increase in the Contract Sum, written notice must be given before proceeding to execute the Work.
- 8.3. Subject to the requirements of Article 9, if Contractor wishes to make a Claim for additional time, the required written notice must include an estimate of cost and probable effect of delay on progress of the Work. In the event of continuing delay, only one Claim is necessary. If adverse weather conditions are the basis for a Claim for additional time, such claim must be documented by data substantiating that weather conditions were abnormal for the period of time and could not have been reasonably anticipated, and that weather conditions had an adverse effect on the scheduled construction.
  - 8.3.1. The delays for which the Contractor is entitled to additional time are "Excusable Delays." The only Excusable Delays are those delays on the critical path which the Contractor establishes were: (a) caused by the Owner or those in privity of contract with the Owner, (b) physical damage to the Project over which the Contractor has no control, (c) labor disputes beyond the control of the Contractor, (d) work days

lost due to weather conditions as provided under Section 4.4.1, (e) concealed or unknown conditions under Section 9.4, and (f) other unforeseeable delays beyond the control of the Contractor and its subcontractors and suppliers of any tier. The delays for which the Contractor is entitled to additional time and money are "Compensable Delays." The only Compensable Delays are those Excusable Delays which the Contractor establishes were proximately caused by an improper action or failure to act by the Owner. Owner, in its sole and reasonable discretion, shall determine whether a delay entitles Contractor to time extension or additional compensation.

- 8.4. If conditions are encountered at the site which are (1) subsurface or otherwise concealed physical conditions that differ materially from those indicated in the Contract Documents or (2) unknown physical conditions of an unusual nature that differ materially from those ordinarily found to exist and generally recognized as inherent in construction activities of the character provided for in the Contract Documents, then the Contractor shall give written notice to the Owner and the Design Professional, if any, promptly before conditions are disturbed and in no event later than forty-eight (48) hours after first observance of the conditions. If the conditions are materially different and cause an increase or decrease in the Contractor's cost of, or time required for, performance of any part of the Work, Owner will issue an appropriate Change Order.
- 8.5. Contractor must make all claims by submitting a properly completed Statement of Claim Form (Exhibit C) per Article 9 within seven (7) days after the occurrence of the event giving rise to the Claim. Proper notice of delay as required under Section 4.4.1 is a condition precedent to entitlement of a Claim. Failure to do so results in an irrevocable waiver of the Claim.
- 8.6. Within ten (10) days of its receipt of a written request, Contractor must make available to Owner or its representative any books, records, or other documents in its possession or to which it has access relating to any Claim and must require its Subcontractors, regardless of tier, and materialmen to do likewise.
- 8.7. If a Contractor's Claim has not been resolved at the time of Substantial Completion, the Contractor's exclusive remedy is to file suit in the Common Pleas Court for the county in which the Project is located within 90 days of Substantial Completion, unless the parties otherwise agree in writing, else such Claim is waived. Each party waives its right to remove any such suit to federal court.
- 8.8. Unless otherwise agreed in writing, Contractor shall continue its Work on the Project and shall maintain progress during any mediation, arbitration, or litigation proceedings, and the Owner shall continue to make payments to the Contractor in accordance with this Agreement, however, the Owner shall be under no obligation to make payments on or against any claim or amounts in dispute during the pendency of any mediation, arbitration, or litigation proceeding to resolve those claims or amounts in dispute.
- 8.9. Waiver of Claims for Consequential Damages. The Contractor waives Claims against the Owner for consequential damages arising out of or relating to this Contract. This waiver includes damages incurred by the Contractor for principal office expenses including the compensation of personnel stationed there, for losses of financing, business and reputation, and for loss of profit except anticipated profit arising directly from the Work. This waiver is applicable, without limitation, to all consequential damages due to the Owner's termination of the Agreement in accordance with this Agreement.

## 9. DEFAULT OF CONTRACTOR.

9.1. Events of Default. Each of the following constitutes an event of default of Contractor:

- 9.1.1. Contractor's failure to perform any of its obligations under the Contract Documents or failure to proceed to commence to correct such failure in accordance with Section 5.1.
- 9.1.2. Contractor's failure to pay its obligations incurred in connection with this Agreement as they become due or Contractor's insolvency.

9.2. Owner's Remedies. Upon the occurrence of an event of default, Owner has the following remedies, which are cumulative:

- 9.2.1. Order Contractor to stop the Work, which Contractor must do immediately;
- 9.2.2. To perform through others all or any part of the Work remaining to be done and to deduct the cost thereof from the unpaid balance of the Contract Sum or, if the unpaid balance of the Contract Sum is inadequate, to demand reimbursement of amounts previously paid to Contractor;
- 9.2.3. To terminate this Agreement and take possession of, for the purpose of completing the Work or any part of it, all materials, equipment, scaffolds, tools, appliances, and other items belonging to or possessed by Contractor, all of which Contractor hereby transfers and assigns to Owner for such purpose, and to employ any person or persons to complete the Work, including Contractor's employees, and Contractor will not be entitled to receive any further payment until the Work is completed;

9.3. To accept assignment of Contractor's subcontracts for the Project, pursuant to any prior rights of the surety, if any, and, at the Owners' sole discretion, to further assign the subcontracts to a successor contractor or other entity provided that (i) the Owner terminates this Agreement for cause, and (ii) provides written notice of such assignment to both Contractor and Subcontractor; and/or, All other remedies that Owner may have at law or in equity or otherwise under the Contract Documents.

9.4. Termination of Agreement. The termination of this Agreement will be without prejudice to Owner's rights and remedies, including without limitation Owner's right to be indemnified by Contractor.

9.5. Payments Due Contractor. If the unpaid balance of the Contract Sum exceeds the cost of finishing the Project, including any costs, expenses, or damages incurred by Owner as a result of the event of default, including attorneys' and consultants' fees and the administrative expense of Owner's staff, such excess shall be paid to Contractor. If such costs exceed the unpaid balance, Contractor is responsible to pay the difference to Owner. The obligations under this section will survive termination of this Agreement.

## 10. DEFAULT OF OWNER.

10.1 Events of Default. The following constitutes the exclusive events of default of Owner:

- 10.1.1 Failure of Owner to perform any express material obligation under the Contract

Documents and to correct such failure within thirty (30) days after receipt of written notice thereof from Contractor specifying the default and the necessary corrective action.

## 10.2 Contractor's Remedy.

10.2.1 Contractor's sole and exclusive remedy for the default of Owner shall be to follow the procedure set forth in Article 9.

10.2.2 Notwithstanding Section 10.2.1, if Owner fails to pay Contractor undisputed amounts as payment becomes due, Contractor may, upon fifteen (15) days written notice, stop the Work until payment of the undisputed amount owing has been received.

## 11. SUSPENSION OR TERMINATION FOR THE CONVENIENCE OF OWNER.

### 11.1. Suspension for the Convenience of Owner.

11.1.1. Owner may, without cause, order Contractor to suspend, delay, or interrupt the Work in whole or in part for such period of time as Owner may determine.

11.1.2. An equitable adjustment will be made for increases in the Contract Time and cost of performance of the Work, including profit and overhead on the increased cost of performance, caused by the suspension, delay or interruption, provided that the total cost of profit and overhead shall not exceed ten percent (10%) of the amount of the increased cost not attributable to profit or overhead. No adjustment will be made to the extent that:

- (a) performance is, was or would have been so suspended, delayed, or interrupted by another cause for which Contractor is responsible; or
- (b) an equitable adjustment is made or denied under another provision of this Agreement for a concurrent event.

### 11.2. Termination for the Convenience of Owner.

11.2.1. Owner may, in its discretion and without cause, upon three (3) business days' written notice to Contractor terminate this Agreement for Owner's convenience.

11.2.2. Upon receipt of a written notice from Owner terminating this Agreement for the Owner's convenience and without cause, the Contractor will (i) immediately cease performing any or all portions of the Work, unless otherwise directed by the Owner, in which case the Contractor will take the action directed by the Owner, (ii) immediately take all reasonable and necessary action to protect and preserve the Work, and (iii) unless otherwise directed by Owner, terminate or assign all agreements with Subcontractors and suppliers.

11.2.3. If this Agreement is terminated for the Owner's convenience and there exists no event of Contractor's default, as defined in this Agreement, the Contractor shall be entitled to receive payment (i) for Work properly executed up to the date the notice of termination is received by Contractor, including overhead and profit up to the date of termination, and (ii) for Work performed at the direction of the Owner on and after the date on which the notice of termination is received by the Contractor, as determined

by the procedures applicable to Change Orders.

11.2.4. If this Agreement is terminated for the Owner's convenience and there exists an event of Contractor's default, as defined in this Agreement, Contractor will be entitled to receive only such sums as it would be entitled to receive following the occurrence of an event of default under this Agreement.

11.2.5. The termination of this Agreement will be without prejudice to any rights or remedies that exist at the time of termination.

## 12. INSURANCE, INDEMNIFICATION, AND BOND.

12.1 Contractors must maintain commercial general liability insurance in the minimum amount of \$1,000,000.00 per incident and \$2,000,000.00 aggregate, worker's compensation coverage as required by the Ohio Revised Code.

12.2 Automobile liability coverage in the minimum amount of \$1,000,000.00 per accident and \$2,000,000 aggregate, and an umbrella policy in the minimum amount of \$5,000,000.00, unless Owner approves other coverage limits in writing. Excess or umbrella coverage may be used to meet these levels of insurance. The Owner and County Firm, LLC. shall be named as an additional insured on the Contractor's insurance policies. The Contractor shall provide a certificate of insurance showing the required coverages, with the Owner named as a certificate holder and as an additional insured; Contractor also agrees to provide Owner with at least thirty (30) days' notice prior to any changes in coverage of the required insurance. The Contractor shall maintain all such coverage for a period of 3 years after the Date for Final Completion.

12.3 The Contractor shall maintain Contractors Errors & Omissions Liability Insurance insuring against errors and omissions arising from the Work if the Work involves any construction management or the preparation of plans and drawings, with limits of not less than \$1,000,000.00 per claim. Such policy shall not contain any exclusions directed toward any types of materials, services or processes involved in the Work. The retroactive date for coverage will be no later than the commencement date of design and will state that in the event of cancellation or nonrenewal the discovery period for insurance claims will be at least three (3) years or otherwise as by written agreement with the Owner.

12.4 Insurance furnished by the Owner, if any, is not intended to and does not cover equipment and materials before they are physically incorporated into the Work or tools. Contractor bears the entire risk of loss with respect to tools, equipment, and materials. Contractor is responsible for damages to Owner's property and to adjacent property caused by or related to the Work or actions by Contractor's employees or those of its subcontractors.

12.5 The Contractor shall purchase and maintain, in a company or companies lawfully authorized to do business in the jurisdiction in which the Project is located, property insurance on an "all-risk" or equivalent policy form, including builder's risk, in the amount of the initial Contract Sum, plus the value of subsequent modifications and cost of materials supplied and installed by others, comprising total value for the entire Project at the site on a replacement cost basis without optional deductibles. Such property insurance shall be maintained, unless otherwise provided in the Contract Documents or otherwise agreed in writing by all persons and entities who are beneficiaries of such insurance, until final payment has been made as provided in Section 7.3 or until no person or entity other than the Owner has an insurable

interest in the property required by this Section 13.3 to be covered, whichever is later. The insurance shall include interests of the Owner, the Contractor, Subcontractors, and Sub-subcontractors in the Project.

12.6 Owner and Contractor waive all rights, including all rights of subrogation, against each other and against Subcontractors, Sub-subcontractors, consultants, agents, and employees of the other for damages during construction, but only to the extent covered by (and not prohibited by) any applicable property insurance or builder's risk insurance, except such rights as they may have to the proceeds of such insurances.

12.7 To the maximum extent permitted by law, Contractor shall indemnify and hold harmless Owner and Owner's consultants, agents, and employees from and against all claims, damages, losses, and expenses, including but not limited to attorneys' and consultants' fees, arising out of or related to the performance of the Work, including but not limited to the failure of Contractor to perform its obligations under the Contract Documents, any claims for bodily injury, sickness, disease, or death or to injury to or destruction of or loss of use of real or personal property, claims for additional storage and handling charges, liens against funds, claims related to the alleged failure of the Contractor to perform in accordance with the Contract Documents, and/or claims related to the removal, handling, or use of any hazardous materials. Owner may withhold amounts equal to any sums for which it is entitled to be indemnified from the amounts otherwise due Contractor under the Contract Documents.

12.8 In claims against any person or entity indemnified under this Contract by an employee of Contractor, a Subcontractor, anyone directly or indirectly employed by them or anyone for whose acts they may be liable, the indemnification obligations under this Contract shall not be limited by a limitation on amount or type of damages, compensation, or benefits payable for Contractor or Subcontractor under workers' compensation acts, disability benefits acts, or other employee benefits acts. Contractor expressly waives any protection or immunity with respect to Workers' Compensation claims related to indemnification given under this Agreement.

12.9 Contract Bond.

12.9.1 The Contractor shall provide a contract bond to guaranty payment and performance of the Work, as required by Ohio law. When the Contractor delivers the executed counterparts of the Agreement to the Owner, the Contractor shall deliver such bond to the Owner, along with other documents as may be required.

12.9.2 If the surety on any bond furnished by the Contractor is declared bankrupt or becomes insolvent or its right to do business is terminated in any state where any part of the Project is located or it ceases to meet the requirements of the Agreement or Ohio law, the Contractor shall promptly notify the Owner and shall, within twenty (20) days after the event giving rise to such notification, provide another bond and surety, both of which shall comply with the requirements of the Contract Documents and Ohio law.

12.9.3 Upon the request of any person or entity appearing to be a potential beneficiary of bonds covering payment of obligations arising under the Contract, the Contractor shall promptly furnish a copy of the bonds or shall authorize a copy to be furnished.

12.9.4 Material Default or Termination. If the Owner notifies the Contractor's surety that the Contractor is in material default or terminates the Contract, the surety will

promptly and within twenty-one (21) days investigate the claimed material default or termination. If the Owner gives a notice of material default and then terminates the Contract, the surety shall complete its investigation within twenty-one (21) days of the notice of material default. As part of such investigation, the surety shall visit the offices of the Contractor and Owner to review the available project records. If the surety proposes to take over the Work, the surety shall do so no later than the expiration of the twenty-one (21) day period or ten (10) days after the date the Owner terminates the Contract, whichever is later. If the Owner terminates the Work, and the surety proposed to provide a replacement contractor, the replacement contractor shall be fully capable of performing the Work in accordance with the Contract Documents, including meeting all of the requirements of the Contract Documents. If the Contractor is terminated, the replacement contractor shall not be the Contractor. The surety will provide the Owner with the results of its investigation, including any written report or documents. This Section 13.7.3 is in addition to the Owner's rights under this Agreement to terminate the Contractor for cause and is not intended to create any rights of the surety, including but not limited to the right to take over the Contractor's obligations.

13. WARRANTIES. In addition to any other warranties, guarantees, or obligations set forth in the Contract Documents or applicable as a matter of law and not in limitation of the terms of the Contract Documents, Contractor warrants and guarantees that:

- (a) Owner will have good title to the Work and all materials and equipment incorporated into the Work will be new;
- (b) The Work and all materials and equipment incorporated into the Work will be free from all defects, including any defects in workmanship or materials;
- (c) The Work and all equipment incorporated into the Work will be fit for the purpose for which intended;
- (d) The Work and all materials and equipment incorporated into the Work will be merchantable; and,
- (e) The Work and all materials and equipment incorporated into the Work will conform in all respects to the Contract Documents.

Upon notice of the breach of any of the foregoing warranties or guarantees or any other warranties or guarantees under the Contract Documents, Contractor, in addition to any other requirements in the Contract Documents, shall commence to correct such breach and all resulting damage within two (2) business days after written notice from the Owner. Contractor shall correct such breach and damage to the satisfaction of Owner within fifteen (15) days of such notice except when an extension of time is granted in writing by Owner; provided that if such notice is given after final payment hereunder, such 2-day period will be extended to seven (7) days and such 15-day period shall be extended to thirty (30) days. If Contractor fails to commence to correct such breach and damage, or to correct such breach and damage as provided above, Owner, upon written notice to Contractor and without prejudice to any of its other rights or remedies, may correct the deficiencies. Contractor upon written notice from Owner shall pay Owner, within ten (10) days after the date of such notice, all of Owner's costs and expenses incurred in connection with or related to such correction and/or breach, including without limitation Owner's administrative, legal, design, and consulting expenses. The foregoing warranties and obligations of Contractor will survive the final payment and/or termination of this Agreement. If the Contractor fails to pay the Owner any amounts due under this Article 14, Contractor will pay Owner, in addition to the amounts due, a late

payment fee of one and one-half percent (1.5%) per month for each month or part thereof that the payments are not paid when due.

#### 14. GENERAL.

- 14.1. **Modification.** No modification or waiver of any of the terms of this Agreement or of any other Contract Documents shall be effective against a party unless set forth in writing and signed by or on behalf of a party, which in the case of Owner shall require the signature of Owner pursuant to a specific resolution of Owner. Under no circumstances will forbearance, including the failure or repeated failure to insist upon compliance with the terms of the Contract Documents, constitute the waiver or modification of any such terms. The parties acknowledge that no person has authority to modify this Agreement or the other Contract Documents or to waive any of its or their terms, except as expressly provided in this Paragraph.
- 14.2. **Assignment.** Contractor may not assign this Agreement without the written consent of Owner, which Owner may withhold in its sole discretion.
- 14.3. **Third Parties.** Nothing contained in this Agreement shall create a contractual relationship with or a cause of action in favor of a third party against either Owner or Contractor.
- 14.4. **Law and Jurisdiction.** All questions regarding the validity, intention, or meaning of this Agreement or any modifications of it relating to the rights and obligations of the parties shall be construed and resolved under the laws of the State of Ohio. Any suit, which may be brought to enforce any provision of this Agreement or any remedy with respect hereto, shall be brought in the Common Pleas Court for the county in which the Project is located, and each party hereby expressly consents to the jurisdiction of such court. Each party waives its right to remove any such suit to federal court.
- 14.5. **Statute of Limitations.** Regardless of any provision to the contrary, the statute of limitations with respect to any defective or non-conforming Work that is not discovered by Owner will not commence until the discovery of such defective or non-conforming Work by Owner.
- 14.6. **Notices.** Notices, requests, or demands by either party shall be in writing, unless otherwise expressly authorized, and shall be personally served; forwarded by expedited messenger service; sent by facsimile transmission; sent by electronic mail with delivery confirmation; or be given by registered or certified mail, return receipt requested, postage prepaid, and addressed to the party at the address set forth at the beginning of this Agreement. Any party may change its address by giving written notice hereunder. All notices, requests, and demands shall be deemed received upon receipt in the case of personal delivery or delivery by expedited messenger service, including leaving the notice at the address provided herein during normal business hours; upon the expiration of forty-eight (48) hours from the time of deposit in the United States mail; or, in the case of a notice given by electronic mail or facsimile transmission, upon the expiration of 24 hours after the transmission is sent.
- 14.7. **Construction.** The parties acknowledge that each party has reviewed this Agreement and the other Contract Documents and has voluntarily entered into this Agreement. Accordingly, the normal rule of construction to the effect that any ambiguities are to be resolved against the drafting party shall not be employed in the interpretation of this Agreement, the other Contract Documents, or any amendments or exhibits to it or them.

- 14.8. Approvals. Except as expressly provided herein, the approvals and determinations of Owner will be subject to the sole discretion of Owner and will be valid and binding on Contractor, provided only that they be made in good faith, i.e., honestly. If Contractor challenges any such approval or determination, Contractor bears the burden of proving by clear and convincing evidence that it was not made in good faith.
- 14.9. Partial Invalidity. If any term or provision of this Agreement is found to be illegal, unenforceable, or in violation of any laws, statutes, ordinances, or regulations of any public authority having jurisdiction, then, notwithstanding such term or provision, this Agreement shall remain in full force and effect, and such term shall be deemed stricken; provided this Agreement shall be interpreted, when possible, so as to reflect the intentions of the parties as indicated by any such stricken term or provision.
- 14.10. Compliance with Laws and Regulations. Contractor, at its expense, must comply with all applicable federal, state, and local laws, rules, and regulations applicable to the Work, including but not limited to ORC Chapter 4115 regarding prevailing wage rates, if applicable.
- 14.11. Project Safety. Contractor must follow all applicable safety and health regulations during the progress of the Project and monitor all of its employees and its subcontractors for compliance with such safety and health regulations. In undertaking the responsibilities set forth in this section, Contractor does not assume any duty or responsibility to the employees of any Subcontractor or supplier, regardless of tier. Owner assumes no responsibility for the development, review, or implementation of any project safety plan or for Project safety and has no authority to direct the means and methods of Contractor.
- 14.12. Equal Opportunity. Contractor will not, and it will ensure that its Subcontractors, regardless of tier, do not, discriminate against any employee or applicant for employment because of race, religion, color, sex, or national origin. Such action includes but is not limited to the following: employment, upgrading, demotion, transfer, recruitment or recruiting advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the policies of nondiscrimination. Contractor is responsible to ensure that each of its Subcontractors, regardless of tier, states in all solicitations or advertisements for employees placed by them or on their behalf that all qualified applicants will receive consideration for employment without regard to race, religion, color, sex, or national origin No Findings for Recovery.
- 14.13. No Findings for Recovery. The Contractor represents that the Contractor is not subject to a finding for recovery under Section 9.24, Ohio Revised Code, or that the Contractor has taken the appropriate remedial steps required under Section 9.24, Ohio Revised Code, or otherwise qualifies under this section. If this representation and warranty is found to be false, the Contract is void, and Contractor will immediately repay Owner any funds paid to Contractor under this Contract.
- 14.14. Non-Discrimination. Contractor agrees:
- (a) That in the hiring of employees for the performance of Work under this Agreement or in any subcontract, neither the Contractor, subcontractor, nor any person acting on behalf of either of them, shall by reason of race, creed, sex, handicap, or color, discriminate against any citizen of the state in the employment of labor or workers who are qualified and available to perform the Work to which the employment relates.

- (b) That neither the Contractor, subcontractor, nor any person acting on behalf of either of them, shall, in any manner, discriminate against or intimidate any employee hired for the performance of Work under this Agreement on account of race, creed, sex, handicap, or color.
- (c) That there shall be deducted from the amount payable to the Contractor by the Owner under this Agreement a forfeiture of twenty-five dollars (\$25.00) as required by Ohio Revised Code Section 153.60 for each person who is discriminated against or intimidated in violation of this Agreement.
- (d) That this Agreement may be canceled or terminated by the Owner and all money to become due hereunder may be forfeited for a second or subsequent violation of the terms of this section of this Agreement.

14.15. Use of Owner's Facilities. Contractor will ensure that neither its employees, nor its Subcontractor's or material supplier's employees, regardless of tier, do any of the following without the express prior written consent of Owner:

- (a) use Owner's facilities including but not limited to, common areas, rest rooms, or phones;
- (b) use or bring any alcoholic beverages, controlled substances, or firearms on any property owned by Owner;
- (c) use any radios, tape or compact disc players, or sound amplification equipment; and
- (d) interact in any manner with building occupants, except where necessary to preserve the safety of building occupants.

Contractor must conspicuously post notice of the prohibitions listed in this section at the Project site in the same location as OSHA notices are required to be posted and shall verbally inform all of Contractor's employees, and the employees of Contractor's Subcontractors and materialmen, regardless of tier, of such prohibitions. The notice must be in a form acceptable to Owner.

14.16. Entire Agreement. This Agreement and the other Contract Documents constitute the entire agreement among the parties with respect to their subject matter and will supersede all prior and contemporaneous, oral or written, agreements, negotiations, communications, representations, and understandings with respect to such subject matter, and no person is justified in relying on such agreements, negotiations, communications, representations, or understandings.

14.17. Attachments. Attachments to this Agreement include:

- Exhibit A: Contract Bond
- Exhibit B: Sales and Use Tax Construction Contract Exemption Certificate
- Exhibit C: Statement of Claim Form
- Exhibit D: Certificate of Substantial Completion
- Exhibit E: Contractor's Affidavit of Payment or Amounts Withheld;
- Exhibit F: Contractor Waiver and Release Affidavit
- Exhibit G: Subcontractors/ Suppliers Waiver and Release Affidavit

Exhibit H: Contractor's Final Lien Waiver and Release Affidavit  
Exhibit I: Subcontractors/ Suppliers Final Lien Waiver and Release Affidavit  
Exhibit J: Prevailing Wage Rates

However, in the event of an inconsistency, the provisions of this Agreement control over any proposal, document, or other attachment.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their properly authorized representatives.

Owner: Fairfield County Board of Commissioners

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name and Title

Date: \_\_\_\_\_

Contractor: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name and Title

Date: \_\_\_\_\_

CERTIFICATE OF  
FUNDS  
(ORC Section  
5705.41)

The undersigned, Fiscal Officer of the Owner, hereby certifies in connection with the Agreement to which this Certificate is attached that the amount required to meet the obligations under the contract, obligation, or expenditure for the services described in the attached agreement, has been lawfully appropriated for the purpose, and is in the treasury or in process of collection to the credit of an appropriate fund, free from any outstanding obligation or encumbrance.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Fiscal Officer

BID GUARANTY AND  
CONTRACT BOND  
(O.R.C. § 153.571)

KNOW ALL PERSONS BY THESE PRESENTS, that we, the undersigned \_\_\_\_\_  
\_\_\_\_\_ ("Contractor") as principal and \_\_\_\_\_  
\_\_\_\_\_ as surety are hereby held and firmly bound unto the Board of  
Commissioners for Fairfield County, Ohio, as obligee in the penal sum of the dollar amount of the bid  
submitted by the principal to the obligee on \_\_\_\_\_, 202\_\_\_\_, to undertake the construction of  
the **Forest Rose HVAC Improvements 2026** Project (the "Project"). The penal sum referred to herein  
shall be the dollar amount of the principal's bid to the obligee, incorporating any additive or deductive  
Alternates made by the principal on the date referred to above to the obligee, which are accepted by  
the obligee. In no case shall the penal sum exceed the amount of \_\_\_\_\_  
\_\_\_\_\_ Dollars (\$\_\_\_\_\_). (If the foregoing blank is not filled in, the penal sum will be the  
full amount of the principal's bid, including add Alternates. Alternatively, if the blank is filled in the amount  
stated must not be less than the full amount of the bid including add Alternates, in dollars and cents. A  
percentage is not acceptable.) For the payment of the penal sum well and truly to be made, we hereby  
jointly and severally bind ourselves, our heirs, executors, administrators, successors, and assigns.

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_

THE CONDITION OF THE ABOVE OBLIGATION IS SUCH that whereas the above named principal has  
submitted a bid for work on the Project.

Now, therefore, if the obligee accepts the bid of the principal and the principal fails to enter into a  
proper contract in accordance with the bid, plans, details, specifications, and bills of material; and in the  
event the principal pays to the obligee the difference not to exceed ten percent (10%) of the penalty hereof  
between the amount specified in the bid and such larger amount for which the obligee may in good faith  
contract with the next lowest bidder to perform the work covered by the bid; or in the event the obligee does  
not award the contract to the next lowest bidder and resubmits the project for bidding, the principal pays to  
the obligee the difference not-to-exceed ten percent (10%) of the penalty hereof between the amount  
specified in the bid, or the costs, in connection with the resubmission, of printing new contract documents,  
required advertising, and printing and mailing notices to prospective bidders, whichever is less, then this  
obligation shall be null and void, otherwise to remain in full force and effect; if the obligee accepts the bid  
of the principal and the principal within ten (10) days after the awarding of the contract enters into a proper  
contract in accordance with the bid, plans, details, specifications, and bills of material, which said contract  
is made a part of this bond the same as though set forth herein.

Now also, if the said principal shall well and faithfully do and perform the things agreed by said  
principal to be done and performed according to the terms of said contract; and shall pay all lawful claims  
of subcontractors, materialmen, and laborers, for labor performed and materials furnished in the carrying  
forward, performing, or completing of said contract; we agreeing and assenting that this undertaking shall  
be for the benefit of any materialman or laborer having a just claim, as well as for the obligee herein; then  
this obligation shall be void; otherwise the same shall remain in full force and effect; and surety shall  
indemnify the obligee against all damage suffered by failure of the principal to perform the contract  
according to its provisions and in accordance with the plans, details, specifications, and bills of material  
therefor and to pay all lawful claims of subcontractors, materialmen, and laborers for labor performed or  
material furnished in carrying forward, performing, or completing the contract and surety further agrees and  
assents that this undertaking is for the benefit of any subcontractor, materialman, or laborer having a just  
claim, as well as for the obligee; it being expressly understood and agreed that the liability of the surety for  
any and all claims hereunder shall in no event exceed the penal amount of this obligation as herein stated.

The said surety hereby stipulates and agrees that no modifications, omissions, or additions in or to the terms of the said contract or in or to the plans or specifications therefore shall in any wise affect the obligations of said surety on its bond, and does hereby waive notice of any such modifications, omissions or additions to the terms of the contract or to the work or to the specifications.

Signed and sealed this \_\_\_\_\_ day of \_\_\_\_\_, 202\_.

\_\_\_\_\_

PRINCIPAL

By: \_\_\_\_\_

Printed Name & Title: \_\_\_\_\_

\_\_\_\_\_

SURETY

By: \_\_\_\_\_

Printed Name & Title: \_\_\_\_\_

\_\_\_\_\_

Surety's Address: \_\_\_\_\_

\_\_\_\_\_

Surety's Telephone Number: \_\_\_\_\_

Surety's Fax Number: \_\_\_\_\_

\_\_\_\_\_

SURETY'S AGENT

Surety's Agent's Address: \_\_\_\_\_

\_\_\_\_\_

Surety's Agent's Telephone Number: \_\_\_\_\_

Surety's Agent's Fax Number: \_\_\_\_\_

NOTE: The Contract Bond form that follows is to be used ONLY by a bidder that is awarded a contract and submits a form of bid guaranty other than the combined Bid Guaranty and Contract Bond with its bid. If a bidder submits a combined Bid Guaranty and Contract Bond, then the bid guaranty becomes the contract bond when the contract is awarded.

AIA Bid Bond or Payment and Performance Bond forms are not acceptable for this Project.

CONTRACT BOND  
(O.R.C. § 153.57)

KNOW ALL PERSONS BY THESE PRESENTS, that we, the undersigned ("Contractor"), as principal, and \_\_\_\_\_, as surety, are hereby held and firmly bound unto the Board of Commissioners for Fairfield County, Ohio ("Owner") as obligee, in the penal sum of \_\_\_\_\_ Dollars (\$ \_\_\_\_\_), for the payment of which well and truly to be made, we hereby jointly and severally bind ourselves, our heirs, executors, administrators, successors, and assigns.

THE CONDITION OF THE ABOVE OBLIGATION IS SUCH that whereas, the above-named principal did on the \_\_\_\_\_ day of \_\_\_\_\_, 2026, enter into a contract with the Owner for construction of the **Forest Rose HVAC Improvements 2026** Project (the ("Project")), which said contract is made a part of this bond the same as though set forth herein:

Now, if the said Contractor shall well and faithfully do and perform the things agreed by the Contractor to be done and performed according to the terms of said contract; and shall pay all lawful claims of subcontractors, materialmen, and laborers, for labor performed and materials furnished in the carrying forward, performing, or completing of said contract; we agreeing and assenting that this undertaking shall be for the benefit of any materialman or laborer having a just claim, as well as for the obligee herein; then this obligation shall be void; otherwise the same shall remain in full force and effect; it being expressly understood and agreed that the liability of the surety for any and all claims hereunder shall in no event exceed the penal amount of this obligation as herein stated.

The said surety hereby stipulates and agrees that no modifications, omissions, or additions in or to the terms of the said contract or in or to the plans or specifications therefore shall in any wise affect the obligations of said surety on its bond, and does hereby waive notice of any such modifications, omissions or additions to the terms of the contract or to the work or to the specifications.

Signed and sealed this \_\_\_\_\_ day of \_\_\_\_\_, 202\_.

\_\_\_\_\_  
(PRINCIPAL)

\_\_\_\_\_  
(SURETY)

By: \_\_\_\_\_

By: \_\_\_\_\_

Printed Name & Title: \_\_\_\_\_

Printed Name & Title: \_\_\_\_\_

Surety's Address: \_\_\_\_\_

Surety's Telephone Number: \_\_\_\_\_

Surety's Fax Number: \_\_\_\_\_

\_\_\_\_\_  
NAME OF SURETY'S AGENT

Surety's Agent's Address: \_\_\_\_\_

Surety's Agent's Telephone Number: \_\_\_\_\_

Surety's Agent's Fax Number: \_\_\_\_\_

## Sales and Use Tax Construction Contract Exemption Certificate

Identification of Contract:

Contractee's (owner's) name Fairfield County Board of Commissioners

Exact location of job/project Fairfield County Board of Developmental Disabilities, 795 College Avenue, Lancaster, OH 43130

Name of job/project as it appears on contract documentation Forest Rose School HVAC Improvements 2026 Project

The undersigned hereby certifies that the tangible personal property purchased under this exemption certificate was purchased for incorporation into:

<input type="checkbox"/>	A building used exclusively for charitable purposes by a nonprofit organization operated exclusively for charitable purposes as defined in Ohio Revised Code (R.C.) section 5739.02(B)(12);	<input checked="" type="checkbox"/>	Real property that is owned, or will be accepted for ownership at the time of completion, by the United States government, its agencies, the state of Ohio or an Ohio political subdivision;
<input checked="" type="checkbox"/>	Real property under a construction contract with the United States government, its agencies, the state of Ohio or an Ohio political subdivision;	<input type="checkbox"/>	A computer data center entitled to exemption under R.C. 122.175;
<input type="checkbox"/>	A horticulture structure or livestock structure for a person engaged in the business of horticulture or producing livestock;	<input type="checkbox"/>	A building under a construction contract with an organization exempt from taxation under section 501(c)(3) of the Internal Revenue Code of 1986 when the building is to be used exclusively for the organization's exempt purposes;
<input type="checkbox"/>	A house of public worship or religious education;		
<input type="checkbox"/>	The original construction of a sports facility under R.C. section 307.696;	<input type="checkbox"/>	A hospital facility entitled to exemption under R.C. section 140.08;
<input type="checkbox"/>	Real property outside this state if such materials and services, when sold to a construction contractor in the state in which the real property is located for incorporation into real property in that state, would be exempt from a tax on sales levied by that state;	<input type="checkbox"/>	Building and construction materials and services sold for incorporation into real property comprising a convention center that qualifies for property tax exemption under R.C. 5709.084 (until one calendar year after the construction is completed).

The original of this certificate must be signed by the owner/contractee and/or government official and must be retained by the prime contractor. Copies must be maintained by the owner/contractee and all subcontractors. When copies are issued to suppliers when purchasing materials, each copy must be signed by the contractor or subcontractor making the purchase.

**Prime Contractor**

Name \_\_\_\_\_  
Signed by \_\_\_\_\_  
Title \_\_\_\_\_  
Street address \_\_\_\_\_  
City, state, ZIP code \_\_\_\_\_  
Date \_\_\_\_\_

**Subcontractor**

Name \_\_\_\_\_  
Signed by \_\_\_\_\_  
Title \_\_\_\_\_  
Street address \_\_\_\_\_  
City, state, ZIP code \_\_\_\_\_  
Date \_\_\_\_\_

**Owner/Contractee**

Name Fairfield County Board of Commissioners  
Signed by \_\_\_\_\_  
Title \_\_\_\_\_  
Street address 201 E. Main Street, #301  
City, state, ZIP code Lancaster, Ohio 43130  
Date \_\_\_\_\_

**Political Subdivision**

Name Fairfield County Board of Commissioners  
Signed by \_\_\_\_\_  
Title \_\_\_\_\_  
Street address 201 E. Main Street, #301  
City, state, ZIP code Lancaster, Ohio 43130  
Date \_\_\_\_\_



STATEMENT OF CLAIM FORM

Claim No. \_\_\_ for Contractor

1. Name of Contractor: \_\_\_\_\_

2. Date written claim given: \_\_\_\_\_.

3. Contractor's representative to contact regarding the claim:

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Telephone No. \_\_\_\_\_ (office) FAX No. \_\_\_\_\_

E-mail: \_\_\_\_\_

4. General description of claim:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Contract Documents. If the claim is based upon any part or provision in the Contract Documents, including but not limited to pages in the Drawings and/or paragraphs in the Specifications, Owner-Contractor Agreement, General Conditions or Supplementary General Conditions, state upon which parts or provisions the claim is based:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Delay claims:

6.1 Date delay commenced: \_\_\_\_\_

6.2 Duration or expected duration of the delay, if known: \_\_\_\_\_

6.3 Apparent cause of the delay and part of critical path affected:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6.4 Expected impact of the delay and recommendations for minimizing such impact:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7. Additional compensation. Set forth in detail all additional compensation to which the Contractor believes it is entitled with respect to this claim:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. Instructions for Completing the Statement of Claim Form ("Instructions"). The Instructions are incorporated in this Form.

9. Truth of Claim. By submitting this claim, the Contractor and its representative certify that after conscientious and thorough review and to the best of his or her knowledge and belief a) the Contractor has complied fully with the Instructions, b) the information in this State of Claim is accurate, c) the Contractor is entitled to recover the compensation in paragraph 7, and d) the Contractor has not knowingly presented a false or fraudulent claim. The Contractor by its authorized representative must acknowledge this Statement of Claim before a notary public.

CONTRACTOR: \_\_\_\_\_

By: \_\_\_\_\_

Name and \_\_\_\_\_ Title: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_

CONTRACTOR'S ACKNOWLEDGMENT

State of \_\_\_\_\_,

County of \_\_\_\_\_, ss:

\_\_\_\_\_ first being sworn, states that after conscientious and thorough review, the statements made in attached Statement of Claim Form are complete and true to the best of his or her knowledge and belief.

\_\_\_\_\_

Sworn to before me a notary public by \_\_\_\_\_ on \_\_\_\_\_, 20\_\_ . The notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with regard to the notarial act certified to hereby.

\_\_\_\_\_

Notary Public

WHEN COMPLETED, FORWARD A COPY OF THIS NOTICE AND STATEMENT OF CLAIM FORM TO THE OWNER AND DESIGN PROFESSIONAL.

## INSTRUCTIONS FOR COMPLETING THE STATEMENT OF CLAIM FORM

1. Completing the Statement of Claim Form ("Claim Form") is a material term of the Contract. The Claim Form tells the Owner and Design Professional that the Contractor is making a Claim and that they need to act promptly to mitigate the effects of the occurrence giving rise to the Claim. The Claim Form also provides them with information so that they can mitigate such effects. The Contractor acknowledges that constructive knowledge of the conditions giving rise to the Claim through job meetings, correspondence, site observations, etc. is inadequate notice, because knowledge of these conditions does not tell the Owner and Design Professional that the Contractor will be making a Claim and most often is incomplete.
2. If the space provided in the Claim Form is insufficient, the Contractor, as necessary to provide complete and detailed information, must attach pages to the Claim Form with the required information.
3. Paragraph 4. The Contractor must state what it wants, i.e., time and/or compensation, and the reason why it is entitled to time and/or compensation.
4. Paragraph 5. The Contractor must identify the exact provisions of the Contract Documents it is relying on in making its Claim. For example, if the Claim is for a change in the scope of the Contractor's Work, the Contractor must identify the specific provisions of the Specifications, and the Plan sheets and details that provide the basis for the scope change.
5. Paragraph 6. This paragraph applies to delay claims, including delays that the Contractor believes result in constructive acceleration. The Contractor must identify the cause of the delay, party or parties responsible, and what the party did or did not do that caused the delay, i.e., specific work activities. The Contractor acknowledges that general statements are not sufficient, and do not provide the Owner with sufficient information to exercise the remedies available to the Owner or to mitigate the effects of the delay.

For example, if the Contractor claims a slow response time on submittals caused a delay, the Contractor must identify the specific submittals, all relevant dates, and then show on the applicable schedule, by circling or highlighting, the activities immediately affected by the delays. Also for example, if the Contractor claims it was delayed by another Contractor, the Contractor must identify the delaying Contractor, specifically what the delaying Contractor did or did not do that caused the delay, and then show the applicable schedule, by circling or highlighting, the activities immediately affected by the delays. Further by example, if the Contractor seeks an extension of time for unusually severe weather, the Contractor must submit comparative weather data along with a record of the actual weather at the job site and job site conditions.

6. Paragraph 6.4. Time is of the essence under the Contract Documents. If there is a delay, it is important to know what can be done to minimize the impact of the delay. It therefore is important that the Contractor provide specific recommendations on how to do so.
7. Paragraph 7. The Contractor must provide a specific and detailed breakdown of the additional compensation it seeks to recover. For future compensation, the Contractor shall provide its best estimate of such compensation.
8. Paragraph 8 and Acknowledgment. By submitting this Claim, the Contractor and its representative certify that after conscientious and thorough review and to the best of his or her knowledge and belief a) the Contractor has complied fully with the Instructions, b) the information in this Claim Form is accurate, c) the Contractor is entitled to recover the compensation in paragraph 7, and d) the Contractor has not knowingly presented a false or fraudulent claim. The Contractor by its authorized representative must acknowledge this Statement of Claim before a notary public.

End of  
Instructions

CERTIFICATE OF SUBSTANTIAL COMPLETION

Project:

Contract For:

**Forest Rose HVAC Improvements 2026**

General Contract

OWNER:

CONTRACTOR: [insert name and address]

Fairfield County Board of Commissioners

[Redacted]

The Design Professional hereby certifies that the Date for Substantial Completion of the Contractor’s Work as set forth in the Owner-Contractor Agreement is:

[Redacted]

(Insert Date for Substantial Completion of the Work)

The Design Professional hereby certifies that the Date for Substantial Completion in the Contractor’s Agreement with the Owner (the “Agreement”), as extended by Change Orders and Claims submitted by the Contractor that have been Finally Resolved, as defined below, is:

- 1. Date for Substantial Completion in the Agreement (above): [Redacted]
- 2. Additional days added to Date for Substantial Completion by Change Order: [Redacted]
- 3. Additional days added by Claims that have been Finally Resolved: [Redacted]
- 4. Date for Substantial Completion in the Contract Adjusted by days under No. 2 and No. 3 [Redacted]

“Finally Resolved” means that the Design Professional has made a decision (or declined to make a decision) on the Claim under the General Conditions and that any litigation regarding the Claim has been concluded.

The Design Professional certifies that the Contractor’s Work to the best of the Design Professional’s knowledge, information, and belief was Substantially Complete, as Substantial Completion is defined in the Contract Documents, on [Redacted].

The Design Professional hereby certifies that the difference between (a) the Date for Substantial Completion adjusted by the days under No. 2 and No. 3 above and (b) the date the Contractor’s Work was Substantially Complete is [Redacted] days.

NOTICES OF DELAY. The Design Professional hereby certifies that all “NOTICES OF DELAY” submitted by the Contractor and described in the General Conditions are attached to this Certificate. This certification is solely for the purpose of identifying all “NOTICES OF DELAY” submitted by the Contractor and is not intended to imply that any of these NOTICES OF DELAY were properly submitted in accordance with Contract Documents or are valid.

STATEMENT OF CLAIM FORMS. The Design Professional hereby certifies that all Statement of Claim Forms described in the General Conditions and submitted by the Contractor are attached to this Certificate. This certification is solely for the purpose of identifying all Statement of Claim Forms submitted by the

Contractor and is not intended to imply that any of these Statement of Claim Forms were properly submitted in accordance with Contract Documents or are valid.

PUNCHLIST ITEMS. A list of items to be completed by the Contractor is attached to this Certificate. The failure to include items on this list does not change the responsibility of the Contractor to complete its Work in accordance with the Contract Documents. The Contractor shall complete all items on the Punchlist in accordance with the Contract Documents.

Security, maintenance, utilities, damage to the Work and insurance are the responsibility of the Owner and the Contractor based on their operations pursuant to final completion of the Work.

Copies of this Certificate were provided to the Contractor and the Owner on [REDACTED]

Signature: \_\_\_\_\_

Date [REDACTED]





WITHHOLDINGS FROM SUBCONTRACTORS AND/OR SUPPLIERS:

Typed or Printed Name of Subcontractor or Supplier	Amount Withheld	Reason for Withholding

Moreover, Contractor certifies that, except for as set forth immediately above, Contractor has paid all of its subcontractors and suppliers who were due to be paid with the proceeds of the prior Application for Payment and Contractor acknowledges that Owner is relying upon such certification when paying Contractor the amount asked for in the payment application that this Affidavit and Certification supports.

CONTRACTOR: [insert name]

\_\_\_\_\_

BY: \_\_\_\_\_  
(Signature of authorized representative)

NOTARY PUBLIC

Subscribed and sworn to before me on this date by \_\_\_\_\_ on behalf of \_\_\_\_\_.  
The notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with regard to the notarial act certified to hereby.

\_\_\_\_\_  
Signature of Notary Public

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

CONTRACTOR’S WAIVER & RELEASE AFFIDAVIT  
 (“AFFIDAVIT”)

Project: Forest Rose School HVAC Improvements Project 2026

The undersigned hereby acknowledges receipt of payment for all Work on the Project through the date of the prior Application for Payment by the Fairfield County Board of Commissioners (the "Owner") with which it has a contract for the Project.

In return for said payment, and/or pursuant to certain contractual obligations of the undersigned, the undersigned hereby waives and releases any rights it has or may have through the date of the last Application for Payment to any and all types of claims relating to the Project, including without limitation claims of payment, Mechanic’s Lien, stop notice, equitable lien, labor and material bond, breach of contract or unjust enrichment, or any other claim against the Owner, for any labor, materials, or equipment the undersigned may have delivered or provided to the Project, except for any Claims the undersigned has made by properly and timely submitting a Statement of Claim form. The undersigned further certifies that this Affidavit covers claims by all contractors, subcontractors, and suppliers who may have provided any labor, material, or equipment to the Project through the undersigned or at the undersigned’s request. The undersigned acknowledges that all such contractors, subcontractors, sub-subcontractors and suppliers have signed an affidavit in the form of this Affidavit releasing any and all claims against the Owner, except for any Claims the undersigned has made by properly and timely submitting a Statement of Claim form. The undersigned hereby represents and warrants that it has paid any and all welfare, pension, vacation or other contributions required to be paid on account of the employment by the undersigned of any laborers on the Project.

This Affidavit is for the benefit of, and may be relied upon by the Owner. The undersigned hereby agrees to indemnify, defend and hold harmless each of the foregoing, the Project, work of improvement, and real property from any and all claims, or liens that are or should have been released in accordance with this Affidavit.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Authorized Signature (Company Officer)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

State of: \_\_\_\_\_ County of \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_. The notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with regard to the notarial act certified to hereby.

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

SUBCONTRACTORS, SUPPLIERS  
WAIVER & RELEASE AFFIDAVIT  
("AFFIDAVIT")

Project: Forest Rose School HVAC Improvements Project 2026

The undersigned hereby acknowledges receipt of payment for all Work on the Project through the date of the prior Application for Payment by the Contractor ("Contractor") with which it has a contract.

In return for said payment, and/or pursuant to certain contractual obligations of the undersigned, the undersigned hereby waives and releases any rights it has or may have through the date of the Contractor's last Application for Payment and to any and all types of claims relating to the Project, including without limitation claims of payment, Mechanic's Lien, stop notice, equitable lien, labor and material bond, breach of contract or unjust enrichment, or any other claim against the Contractor, the Contractor's surety, and/or the Fairfield County Board of Commissioners (the "Owner"), for any labor, materials, or equipment the undersigned may have delivered or provided to the Project, except for any Claims the undersigned has made by properly and timely submitting a Statement of Claim form, a copy of which has been delivered to the Owner. The undersigned further certifies that this Affidavit covers claims by all contractors, subcontractors and suppliers through the date of the Contractor's last Application for Payment who may have provided any labor, material, or equipment to the Project through the undersigned or at the undersigned's request. The undersigned acknowledges that all such contractors, subcontractors, sub-subcontractors and suppliers have signed an affidavit in the form of this Affidavit releasing any and all claims against the Contractor, the Contractor's surety, and/or the Owner, except for any Claims made by properly and timely submitting a Statement of Claim form a copy of which has been delivered to the Owner. The undersigned hereby represents and warrants that it has paid any and all welfare, pension, vacation or other contributions required to be paid on account of the employment by the undersigned of any laborers on the Project.

The undersigned agrees that upon receipt of the payment from the Contractor with respect to the Contractor's current Application for Payment, it shall, if applicable, immediately execute and cause to be filed or recorded a legally effective Satisfaction of Lien, Release of Lien, or any other legal instrument necessary to cause prejudicial dismissal and release of any lien, encumbrance, lawsuit, or other claim against the Contractor, the Contractor's surety and the Owner, the property where the Project is located, and/or any surety bond posted by the Contractor or the Owner to the extent of the foresaid payment. Upon request of the Contractor, the undersigned shall provide proof of having complied with this obligation.

This Affidavit is for the benefit of, and may be relied upon by, the Contractor, the Contractor's surety and the Owner. The undersigned hereby agrees to indemnify, defend and hold harmless each of the foregoing, the Project, its Work, and real property from any and all claims, or liens that are or should have been released in accordance with this Affidavit and from any liability, cost, or expense incurred as a result of any breach of this Affidavit by the undersigned.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Authorized Signature (Company Officer)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

State of: \_\_\_\_\_ County of \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_. The notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with regard to the notarial act certified to hereby.

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

CONTRACTOR'S FINAL WAIVER & RELEASE AFFIDAVIT  
("AFFIDAVIT")

Project: Forest Rose School HVAC Improvements Project 2026

In consideration for payment received from the Fairfield County Board of Commissioners (the "Owner") in the amount requested in Contractor's Final Application for Payment to the Owner, the receipt of which is hereby acknowledged, the undersigned Contractor hereby waives and releases any rights it has or may have to any and all types of claims relating to the Project, including without limitation claims of payment, Mechanic's Lien, stop notice, equitable lien, labor and material bond, breach of contract or unjust enrichment, or any other claim against the Owner, for any labor, materials, or equipment the undersigned may have delivered or provided to the Project, except for any Claims the undersigned has made by properly and timely submitting a Statement of Claim form. The undersigned further certifies that this Affidavit covers claims by all contractors, subcontractors, and suppliers who may have provided any labor, material, or equipment to the Project through the undersigned or at the undersigned's request. The undersigned acknowledges that all such contractors, subcontractors, sub-subcontractors and suppliers have signed an affidavit in the form of this Affidavit releasing any and all claims against the Owner, except for any Claims the undersigned has made by properly and timely submitting a Statement of Claim form. The undersigned hereby represents and warrants that it has paid any and all welfare, pension, vacation or other contributions required to be paid on account of the employment by the undersigned of any laborers on the Project.

This Affidavit is for the benefit of, and may be relied upon by the Owner. The undersigned hereby agrees to indemnify, defend and hold harmless each of the foregoing, the Project, work of improvement, and real property from any and all claims, or liens that are or should have been released in accordance with this Affidavit.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Authorized Signature (Company Officer)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

State of: \_\_\_\_\_ County of \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_  
day of \_\_\_\_\_. The notarial  
act certified hereby is a jurat. An oath or affirmation was  
administered to the signer with regard to the notarial act  
certified to hereby.

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

SUBCONTRACTORS, SUPPLIERS  
FINAL WAIVER & RELEASE AFFIDAVIT  
("AFFIDAVIT")

Project: Forest Rose School HVAC Improvements Project 2026

Upon receipt of payment in the amount of \$ \_\_\_\_\_ received from \_\_\_\_\_ ("Prime Contractor") the undersigned Subcontractor or Supplier waives and relinquishes all rights of lien or claim that it may have either in law or equity (including but not limited to rights under Ohio Mechanics' Lien Laws, O.R.C. 1311.01 et seq.) with respect to the construction project known Forest Rose School HVAC Improvements Project ("the Project"), for all labor, all equipment, and/or materials provided to or on behalf of the Project throughout its entirety, except for claims previously made pursuant to the agreement in place between Subcontractor or Supplier and Prime Contractor, and any lien previously perfected and remaining unreleased.

The undersigned Subcontractor or Supplier acknowledges and agrees that such payment represents final payment in full for all such labor, equipment and/or materials including retainage, if any, and that the Subcontractor or Supplier has completed its work on the Project. The undersigned Subcontractor or Supplier certifies that all amounts have been paid by the Subcontractor or Supplier for all work or materials furnished by others to the Subcontractor or Supplier for which the Subcontractor or Supplier has received previous payments from Prime Contractor, and Subcontractor or Supplier acknowledges that Prime Contractor is now making payment to the Subcontractor or Supplier in reliance upon such certification. The undersigned Subcontractor or Supplier further certifies that it will pay all amounts lawfully owing for all work or materials furnished by others to the Subcontractor or Supplier with the payment received from Contractor referenced herein.

This Affidavit is for the benefit of, and may be relied upon by, the Contractor, the Contractor's surety and the Owner. The undersigned hereby agrees to indemnify, defend and hold harmless each of the foregoing, the Project, its Work, and real property from any and all claims, or liens that are or should have been released in accordance with this Affidavit and from any liability, cost, or expense incurred as a result of any breach of this Affidavit by the undersigned.

IN WITNESS WHEREOF, the undersigned has caused this Affidavit to be executed by its authorized representative as of the date indicated below.

THE INDIVIDUAL SIGNING THIS AFFIDAVIT REPRESENTS THAT HE/SHE IS AUTHORIZED TO DO SO.

SUBCONTRACTOR OR SUPPLIER:

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Authorized Signature (Company Officer)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

State of: \_\_\_\_\_ County of \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_. The notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with regard to the notarial act certified to hereby.

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

GUIDANCE FOR COMPLETION THE  
NOTICE OF COMMENCEMENT FOR A  
PUBLIC CONSTRUCTION PROJECT

Do not distribute this guidance document with the NOC

This is the form completed once the construction contract is awarded and executed, before construction work begins. The original Notice of Commencement should be kept in your file. Most of the contractor, surety, and surety agent information will be included on the Contract Bond and other submittal documents.

Here are some reminders relating to the Notice of Commencement (“NOC”):

1. Every owner is required to prepare a NOC for a construction project, no matter the size.
2. The Fiscal Officer or other person in charge of a project generally signs the NOC. The signature must be notarized.
3. On public projects, the NOC is not required to be recorded with the County Recorder's Office. You may receive requests for a copy of the recorded NOC, but this is simply a request from contractors and subcontractors who are using a service and/or forms that do not distinguish between public and private project requirements. Remember that a mechanic's lien or claim on a public construction project is not a lien against the real property on which the project is located; it is a claim against the balance of the Principal Contractor's contract.
4. The NOC does not have to be served on anyone. However, you must provide a copy to anyone who requests it. Do not include this guidance document when you provide a copy of the NOC. Keep a record of requests and responses. The general contractor, CMR, or DB (the “Principal Contractor”) has a similar obligation to provide a copy of the NOC to any of its subcontractors and material suppliers, if requested. The request may also include a request for a copy of the Principal Contractor’s bond(s). You may wish to coordinate with the Design Professional to respond to requests for the NOC, if applicable.
5. There is no timeline defined in the Revised Code for providing the requested NOC. However, providing a copy within 10 days is reasonable (and matches the time defined for private construction projects).
6. The NOC is not required to be posted at the project.
7. A Notice of Furnishing (“NOF”) may be sent to you by subcontractors and material suppliers to the Principal Contractor. Keep these with the NOC or the individual contractor's contract. The NOF can be important if an affidavit of claim or mechanic's lien is alleged later. Read the NOF to see if the company sending it is also requesting a copy of the NOC and/or a copy of the Principal Contractor’s bond. It is easy to overlook, and we have found that requests often include a request for one of these items. Subcontractors and material suppliers with a contract directly with the Principal Contractor are not required to furnish a NOF; however, you may receive them from direct subcontractors and material suppliers. Subcontractors and material suppliers with contracts with a subcontract to the Principal Contractor are required to serve a NOF on the Principal Contractor to let the contractor know that they are involved with the project. The Owner is often copied on these transmittals.
8. If you receive an Affidavit of Claim or a Mechanic's Lien Affidavit, a copy must be sent to the Principal Contractor within 5 days of receipt. The Principal Contractor is being notified of the alleged claim and given 20 days to dispute the claim/lien. By statute this must be done, even if the Principal Contractor is also copied on the initial notice to you.
9. If you receive an Affidavit of Claim, you are required to set aside the amount of the claim from funds currently due the Principal Contractor and place it in an escrow account (or interest-bearing savings account) until resolution of the dispute. If the funds are not placed in an escrow account, you may have to pay a higher rate of interest or you may have to pay twice. We can assist you in determining the appropriate amount to set aside and the timing for deposit of the funds into the separate account. For example, if the claim is for \$100,000 and the balance to be paid on the contract is only \$50,000, you are only obligated to withhold the \$50,000 remaining to be paid on the contract.
10. If contracts are awarded for future phases of the same project, you can deal with this by either simply adding the required information for each contractor to the list attached to the Notice or prepare a new Notice of Commencement.

NOTICE OF COMMENCEMENT  
FOR PUBLIC IMPROVEMENT  
(Ohio Revised Code § 1311.252)

State of Ohio,  
County of Fairfield; ss:

[NAME] the [TITLE] for Fairfield County Board of Commissioners being first duly sworn, gives the following information with respect to the public improvement described herein:

1. The name of the public improvement is the Forest Rose School HVAC Improvements Project 2026
2. The Project is located at Fairfield County Board of Developmental Disabilities, 795 College Avenue, Lancaster, Ohio 43130.
3. The name and address of the public authority are:

Fairfield County Board of Commissioners  
210 E. Main Street, #301  
Lancaster, Ohio 43130

4. The name and address of the Principal Contractor working on the Project is:

[REDACTED]  
[REDACTED]  
[REDACTED]

Point of Contact: [REDACTED]

5. The name and address of the surety or sureties, guaranteeing payment of the obligation of the Principal Contractor are as follows:

Surety:

[REDACTED]  
[REDACTED]  
[REDACTED]

Surety Agent:

[REDACTED]  
[REDACTED]  
[REDACTED]

6. The date the public authority first executed a contract with a principal contractor for the public improvement was [REDACTED], 202[REDACTED].
7. The following representative of the public authority should be served with a lien affidavit:

[REDACTED]  
[REDACTED]  
[REDACTED]

with a copy to:

Mark Evans  
Bricker & Eckler LLP  
100 South Third Street  
Columbus, Ohio 43215

The foregoing is true and accurate to the best of my knowledge and the information available to me.

\_\_\_\_\_  
signature

\_\_\_\_\_ printed name

Subscribed and sworn to before me a notary public this \_\_\_\_\_ day of \_\_\_\_\_, 202\_, by \_\_\_\_\_, the \_\_\_\_\_ for \_\_\_\_\_. The notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with regard to the notarial act certified to hereby.

My Commission Expires: \_\_\_\_\_

\_\_\_\_\_  
Notary Public

Date: [Redacted]

SENT BY REGULAR U.S. MAIL

Surety: [Name]  
[Address]  
[Redacted]

Surety's Agent: [Name - Include name of individual who signed bond]  
[Address]  
[Redacted]

Re: Notice of Award of Contract from the Fairfield County Board of  
Commissioners for the Forest Rose School HVAC  
Improvements Project

To Whom It May Concern:

You are notified that your principal, [Contractor Company Name], has been awarded a contract for construction of the Forest Rose School HVAC Improvements Project in the amount of \$[Contract Sum] by the Fairfield County Board of Commissioners. If the Contract Sum increases at any time, the penal sum of the surety bond shall be increased to equal one hundred percent of the Contract Sum. The Project Owner reserves the right to reject any and all proposals or bids until the contract is signed by Owner.

Thank you,

[Representative of Owner Printed  
Name], [Title]

CONTRACTOR'S WAIVER & RELEASE AFFIDAVIT  
("AFFIDAVIT")

Project: **Forest Rose School HVAC Improvements 2026 Project**

The undersigned hereby acknowledges receipt of payment for all Work on the Project through the date of the prior Application for Payment by the Fairfield County Board of Commissioners (the "Owner") with which it has a contract for the Project.

In return for said payment, and/or pursuant to certain contractual obligations of the undersigned, the undersigned hereby waives and releases any rights it has or may have through the date of the last Application for Payment to any and all types of claims relating to the Project, including without limitation claims of payment, Mechanic's Lien, stop notice, equitable lien, labor and material bond, breach of contract or unjust enrichment, or any other claim against the Owner, for any labor, materials, or equipment the undersigned may have delivered or provided to the Project, except for any Claims the undersigned has made by properly and timely submitting a Statement of Claim form. The undersigned further certifies that this Affidavit covers claims by all contractors, subcontractors, and suppliers who may have provided any labor, material, or equipment to the Project through the undersigned or at the undersigned's request. The undersigned acknowledges that all such contractors, subcontractors, sub-subcontractors and suppliers have signed an affidavit in the form of this Affidavit releasing any and all claims against the Owner, except for any Claims the undersigned has made by properly and timely submitting a Statement of Claim form. The undersigned hereby represents and warrants that it has paid any and all welfare, pension, vacation or other contributions required to be paid on account of the employment by the undersigned of any laborers on the Project.

This Affidavit is for the benefit of, and may be relied upon by the Owner. The undersigned hereby agrees to indemnify, defend and hold harmless each of the foregoing, the Project, work of improvement, and real property from any and all claims, or liens that are or should have been released in accordance with this Affidavit.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Authorized Signature (Company Officer)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

State of: \_\_\_\_\_ County of \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_. The notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with regard to the notarial act certified to hereby.

Notary Public: \_\_\_\_\_

My Commission Expires:



SUBCONTRACTORS, SUPPLIERS  
WAIVER & RELEASE AFFIDAVIT  
("AFFIDAVIT")

Project: **Forest Rose School HVAC Improvements 2026 Project**

The undersigned hereby acknowledges receipt of payment for all Work on the Project through the date of the prior Application for Payment by the Contractor ("Contractor") with which it has a contract.

In return for said payment, and/or pursuant to certain contractual obligations of the undersigned, the undersigned hereby waives and releases any rights it has or may have through the date of the Contractor's last Application for Payment and to any and all types of claims relating to the Project, including without limitation claims of payment, Mechanic's Lien, stop notice, equitable lien, labor and material bond, breach of contract or unjust enrichment, or any other claim against the Contractor, the Contractor's surety, and/or the Fairfield County Board of Commissioners (the "Owner"), for any labor, materials, or equipment the undersigned may have delivered or provided to the Project, except for any Claims the undersigned has made by properly and timely submitting a Statement of Claim form, a copy of which has been delivered to the Owner. The undersigned further certifies that this Affidavit covers claims by all contractors, subcontractors and suppliers through the date of the Contractor's last Application for Payment who may have provided any labor, material, or equipment to the Project through the undersigned or at the undersigned's request. The undersigned acknowledges that all such contractors, subcontractors, sub-subcontractors and suppliers have signed an affidavit in the form of this Affidavit releasing any and all claims against the Contractor, the Contractor's surety, and/or the Owner, except for any Claims made by properly and timely submitting a Statement of Claim form a copy of which has been delivered to the Owner. The undersigned hereby represents and warrants that it has paid any and all welfare, pension, vacation or other contributions required to be paid on account of the employment by the undersigned of any laborers on the Project.

The undersigned agrees that upon receipt of the payment from the Contractor with respect to the Contractor's current Application for Payment, it shall, if applicable, immediately execute and cause to be filed or recorded a legally effective Satisfaction of Lien, Release of Lien, or any other legal instrument necessary to cause prejudicial dismissal and release of any lien, encumbrance, lawsuit, or other claim against the Contractor, the Contractor's surety and the Owner, the property where the Project is located, and/or any surety bond posted by the Contractor or the Owner to the extent of the foresaid payment. Upon request of the Contractor, the undersigned shall provide proof of having complied with this obligation.

This Affidavit is for the benefit of, and may be relied upon by, the Contractor, the Contractor's surety and the Owner. The undersigned hereby agrees to indemnify, defend and hold harmless each of the foregoing, the Project, its Work, and real property from any and all claims, or liens that are or should have been released in accordance with this Affidavit and from any liability, cost, or expense incurred as a result of any breach of this Affidavit by the undersigned.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Authorized Signature (Company Officer)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

State of: \_\_\_\_\_ County of \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_. The notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with regard to the notarial act certified to hereby.

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_



CONTRACTOR'S FINAL WAIVER & RELEASE AFFIDAVIT  
("AFFIDAVIT")

Project: **Forest Rose HVAC Improvements 2026 Project**

In consideration for payment received from the Fairfield County Board of Commissioners (the "Owner") in the amount requested in Contractor's Final Application for Payment to the Owner, the receipt of which is hereby acknowledged, the undersigned Contractor hereby waives and releases any rights it has or may have to any and all types of claims relating to the Project, including without limitation claims of payment, Mechanic's Lien, stop notice, equitable lien, labor and material bond, breach of contract or unjust enrichment, or any other claim against the Owner, for any labor, materials, or equipment the undersigned may have delivered or provided to the Project, except for any Claims the undersigned has made by properly and timely submitting a Statement of Claim form. The undersigned further certifies that this Affidavit covers claims by all contractors, subcontractors, and suppliers who may have provided any labor, material, or equipment to the Project through the undersigned or at the undersigned's request. The undersigned acknowledges that all such contractors, subcontractors, sub-subcontractors and suppliers have signed an affidavit in the form of this Affidavit releasing any and all claims against the Owner, except for any Claims the undersigned has made by properly and timely submitting a Statement of Claim form. The undersigned hereby represents and warrants that it has paid any and all welfare, pension, vacation or other contributions required to be paid on account of the employment by the undersigned of any laborers on the Project.

This Affidavit is for the benefit of, and may be relied upon by the Owner. The undersigned hereby agrees to indemnify, defend and hold harmless each of the foregoing, the Project, work of improvement, and real property from any and all claims, or liens that are or should have been released in accordance with this Affidavit.

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Authorized Signature (Company Officer)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

State of: \_\_\_\_\_ County of \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_  
day of \_\_\_\_\_. The notarial  
act certified hereby is a jurat. An oath or affirmation was  
administered to the signer with regard to the notarial act  
certified to hereby.

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_



SUBCONTRACTORS, SUPPLIERS FINAL  
WAIVER & RELEASE AFFIDAVIT  
("AFFIDAVIT")

Project: **Forest Rose School HVAC Improvements 2026** Project

Upon receipt of payment in the amount of \$ \_\_\_\_\_ received from \_\_\_\_\_ ("Prime Contractor") the undersigned Subcontractor or Supplier waives and relinquishes all rights of lien or claim that it may have either in law or equity (including but not limited to rights under Ohio Mechanics' Lien Laws, O.R.C. 1311.01 et seq.) with respect to the construction project known as **Forest Rose HVAC Improvements 2026** Project ("the Project"), for all labor, all equipment, and/or materials provided to or on behalf of the Project throughout its entirety, except for claims previously made pursuant to the agreement in place between Subcontractor or Supplier and Prime Contractor, and any lien previously perfected and remaining unreleased.

The undersigned Subcontractor or Supplier acknowledges and agrees that such payment represents final payment in full for all such labor, equipment and/or materials including retainage, if any, and that the Subcontractor or Supplier has completed its work on the Project. The undersigned Subcontractor or Supplier certifies that all amounts have been paid by the Subcontractor or Supplier for all work or materials furnished by others to the Subcontractor or Supplier for which the Subcontractor or Supplier has received previous payments from Prime Contractor, and Subcontractor or Supplier acknowledges that Prime Contractor is now making payment to the Subcontractor or Supplier in reliance upon such certification. The undersigned Subcontractor or Supplier further certifies that it will pay all amounts lawfully owing for all work or materials furnished by others to the Subcontractor or Supplier with the payment received from Contractor referenced herein.

This Affidavit is for the benefit of, and may be relied upon by, the Contractor, the Contractor's surety and the Owner. The undersigned hereby agrees to indemnify, defend and hold harmless each of the foregoing, the Project, its Work, and real property from any and all claims, or liens that are or should have been released in accordance with this Affidavit and from any liability, cost, or expense incurred as a result of any breach of this Affidavit by the undersigned.

IN WITNESS WHEREOF, the undersigned has caused this Affidavit to be executed by its authorized representative as of the date indicated below.

THE INDIVIDUAL SIGNING THIS AFFIDAVIT REPRESENTS THAT HE/SHE IS AUTHORIZED TO DO SO.

SUBCONTRACTOR OR SUPPLIER:

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Authorized Signature (Company Officer)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

State of: \_\_\_\_\_ County of \_\_\_\_\_

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_. The notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with regard to the notarial act certified to hereby.

Notary Public: \_\_\_\_\_

My Commission Expires: \_\_\_\_\_





signature

\_\_\_\_\_  
printed name

Subscribed and sworn to before me a notary public this \_\_\_\_\_ day of \_\_\_\_\_, 202\_, by  
\_\_\_\_\_, the \_\_\_\_\_ for \_\_\_\_\_. The  
notarial act certified hereby is a jurat. An oath or affirmation was administered to the signer with  
regard to the notarial act certified to hereby.

My Commission Expires:

\_\_\_\_\_

\_\_\_\_\_  
Notary Public

Date: [Redacted]

SENT BY REGULAR U.S. MAIL

Surety: [Name]  
[Address]  
[Redacted]

Surety's Agent: [Name - Include name of individual who signed bond]  
[Address]  
[Redacted]

Re: Notice of Award of Contract from the Fairfield County Board of Commissioners for **the Forest Rose School HVAC Improvements 2026** Project

To Whom It May Concern:

You are notified that your principal, [Contractor Company Name], has been awarded a contract for construction of the **Forest Rose HVAC Improvements 2026** Project in the amount of \$[Contract Sum] by the Fairfield County Board of Commissioners. If the Contract Sum increases at any time, the penal sum of the surety bond shall be increased to equal one hundred percent of the Contract Sum. The Project Owner reserves the right to reject any and all proposals or bids until the contract is signed by Owner.

Thank you,

[Representative of Owner Printed Name], [Title]

NOTICE TO SURETY AND TO SURETY'S AGENT

## SECTION 102326 – OVERALL SPECIFICATIONS

## PART 1 - GENERAL

## 1.1 RELATED DOCUMENTS &amp; GENERAL SCOPE OF WORK

- A. Instructions to Proposers, Overall Scopes of Work descriptions, published Supplemental Drawings/Documents and general provisions of the Performance Specification Contract, including General and Supplementary Conditions and Documents of Owner Requirements apply to this Section.
1. Refer to Original and subsequent RFP Documents issued by County's Professional Services Consultants, that may be referred to as the Owner's Project Requirements (OPR). The OPR Documents in-whole are considered the minimum standard on which the Proposing Design-Build format Contractor bases his offering.
    - a. Each Proposing Contractor (and necessary sub-contractors/vendors) will familiarize himself/team with all documents issued as part of the OPR, including Front-End, Exhibits and For-Reference documents in addition to typical drawings & specifications addressing the project Scopes of Work.
    - b. Each Proposing Contractor will issue an RFI (Request for Information) for any apparent or possible conflict found in the OPR documents/field verification efforts in a timeframe before Proposals are due such that the County can responsibly offer a clarification on each item in question.
    - c. If in the event that any conflict discovered/questioned in the OPR documents (i.e. between Specifications and Drawing references) is not properly/officially addressed prior to Proposals being due, the Proposing Contractor will base his offer on the most conservative/stringent/highest value or quantity of the interpretation of the matter, as determined by the Owner/Consultant, which will then continue into final design & coordination stages after a successful award of Contract is made.
  2. **Forest Rose School HVAC Improvements 2026 Project:**  
Scope of Work: General – [Base Scope], refer to all of the OPR documents issued:
    - a. HVAC Upgrades:
      - 1) Provide new water source heat pumps, associated duct transitions, piping connections and controls.
      - 2) New controls and control valves for the units by Speer Mechanical Controls.

## 1.2 SUMMARY

- A. The purpose of this Overall Specification Section is to describe the project's main intent, to establish main boundaries of responsibilities (including the performance of ALL design & construction work in accordance with local/County requirements and Usual & Customary Standards), and to reasonably narrow the not-yet-made choices of the proposers according to Owner-driven Criteria & Project intents:
1. Basic Form of Contract – Performance Specification Design-Build (D-B) Contractor with Guaranteed Maximum Lump-Sum Pricing (refer to supplemental documents for legal and clarifications). Mechanical/Plumbing/Electrical/General is primary under a Performance-Based (D-B) Agreement using Owner-furnished schematic design/criteria and certain Owner-evaluated equipment and services as noted.

2. Schedule: Coordinate Proposed activities to allow project completions to coincide with target completions of this Scope of Work, based upon published schedules in RFQ/RFP documents:
  - a. Project complete before the start of school fall 2026
3. Demolition: Bidder is responsible for the demolition of materials/equipment affecting the Scopes of Work. The Bidder will assume ALL project-required Asbestos-related abatements will be/have been performed by the Owner, unless noted otherwise.
  - a. Coordinate Salvage Rights of Owner with Owner's designated representative prior to removals and disposals. Items not claimed by Owner through this process shall be completely removed and properly disposed.
    - 1) Contractor shall provide a complete (by official Transmittal to & Signed-off by Owner) Inventory of Demolished materials/items designated as "Salvaged-Retained-by-Owner", including but not limited to: Descriptions, Make/Model Numbers, Serial Numbers, Quantity, etc.
4. General Trades Scope of Work – furnished by Bidder as appropriate for the work. This may include, but is not limited to:
  - a. Complete Final Design and Supportive Coordination for intended Scopes of Work noted in schematic documents and descriptions, both Base and Alternates.
    - 1) Both Engineering Design and Means & Methods for all General Trades items required by the new mechanical/electrical systems Scope are a part of the Performance-Based proposal. General Trades Sub-Contractor(s) will use Pre-purchased equipment information and Electrical Contractor's equipment/systems choices in the proposal and evaluate the building system re-works/new components that are required, coordinated with schematic plans/documents published. Specific items to note include, but are not limited to:
      - a) Provision for necessary/beneficial Re-Work of existing Exterior Panels/Wall Systems in affected work areas; Exteriors Sub-Contractor to assess and evaluate best options for performing the targeted Base Electrical Scopes with "Final-finished" Siding/Wall Systems in mind.
  - b. Existing Exterior Partition modifications required by intended Scope of Work (fencing, walls, ceilings, flooring, etc.): No New Work intended beyond that which affects the new electrical equipment/systems and routing paths - Return to Existing (risk-protected) Conditions unless noted otherwise.
  - c. Coordination with Owner/Owner's Representative teams on Project Schedule and Work Progress Plans (locations, areas, shut-downs, tie-ins, etc.).
5. Electrical Trades Scope of Work – furnished/coordinated by Bidder as appropriate for the work. This may include, but is not limited to:
  - a. Complete Final Design and Overall Coordination for intended Scope of Work noted in schematic documents and descriptions.
    - 1) Both Engineering Design and Means & Methods for all Electrical items required by any revised Power/Lighting scopes are a part of the Performance-Based proposal.
      - a) Re-Work of existing Main Power Panels/Feeds to affected/new Lighting systems, Emergency power, Ventilation Fans and Mechanical Equipment. Field-coordinate Electrical power locations and unitary components to allow for proper installations/performance based on wiring distance/routing and locations of required terminations.
  - b. Coordination with Project Team on Project Schedule and Work Progress Plans (renovation locations, areas, shut-downs, tie-ins, etc.).

- c. Complete Installation (materials and labor) for the new electrical systems being updated.
  - 1) Conduit/wiring Exposed-to-Walls or penetrating from walls/ceiling spaces thru occupied floor spaces should be located to minimize interruption to use of prime floor space and finished to match the current décor in the spaces/routes chosen for the pathways.

### 1.3 RELATED SPECIFICATION SECTIONS

- A. The equipment and systems designated as Owner-pre-purchased or preferred may have specification sections supplemental to this section. The Intent of any supplemental specification sections offered is to enhance the descriptions of these equipment and services items so that each Performance-Based (D-B) Proposer has reasonable information to consider in preparing his Scope/Design/pricing. Actual Completed Designs and Installations proposed are to be fully compliant with applicable customary and Owner-furnished standards, industry best practices, written installation instructions offered by the manufacturers of the equipment to be installed, and applicable local, state and national code regulations. Related sections include, but are not limited to:
  1. Water Source Heat Pumps

### 1.4 SUBMITTALS

- A. Pre-Award Phase: At time of (D-B) Performance Specification Proposal and in addition to any Proposal/Bid/Clarification Forms required, provide the following documents to aid the evaluation of Proposals meeting the Criteria:
  1. Schedule of Construction: timeline and expected area sequence of actions – to be continually updated for plans and progress and then shared with Construction Team.
  2. Floor Plans for Project Areas.
  3. Main Electrical Power System Update w/ planned updates to existing One-Line Diagram.
  4. Technical Clarification Statements, Options & Conditions.
- B. Post-Award/Construction Phase: Prior to/after the completion of the Pre-Construction Meeting, provide the following documents to aid the evaluation of Proposals meeting the Criteria established:
  1. Schedule of Construction: timeline and expected area sequence of actions – to be continually updated for plans and progress and then shared with Construction Team.
    - a. During Construction, approximately by 30 days before completion of the project, an updated Left-to-Do Schedule shall be published to County with critical Timeline schedule or all remaining items to complete.
  2. Final Product Data/System Submittals – refer to individual sections for Submittal requirements, but include as a minimum:
    - a. Final HVAC Systems - Equipment & Accessories:
    - b. Accepted supplemental Scope Product/System Data-information – as applicable.
    - c. Final ALT Scopes of Work schedules/components/systems.
  3. Final Plan Approval/Permit and Coordination Drawing documents for applicable Scopes:
    - a. HVAC Systems.

- C. Product Data: For each product component proposed, not Owner-furnished: Include standard documentation for the purposes of Owner-review and recordkeeping. Included in this group, but not limited to the group, are the following items:
  - 1. Warranty terms and associated project documentation.
  - 2. Maintenance and Operation data, for inclusion in master job O & M manuals.
- D. Operation and Maintenance Data: For each product/system provided to include in emergency, operation, and maintenance manuals.
  - 1. Include a SPECIFIC Summary of required maintenance items for each unit/system, complete with pertinent part numbers and frequency of actions recommended.
- E. Closeout Documentation & Materials: Provide complete documents as required by the Scope of Work including coordination of any Owner pre-purchased items, transmitted to the Owner's Consultants as requested, including, but not limited to:
  - 1. As-Built versions of all Drawings covering the Scope of Work, in hard red-line, pdf and CAD formats..
  - 2. Complete Startup Documentation for each System affected Equipment in Scope of Work, including coordination of any Owner pre-purchased items.
  - 3. Final Pay Applications and Waivers.
  - 4. Clarification that Punch Lists and Issues Logs are fully completed.
  - 5. Operations & Maintenance Manuals/Data as specified.
  - 6. Training Documents.
  - 7. Warranty Documents.
  - 8. Systems Manuals.
  - 9. Extra Material/Attic Stock: Signed Receipt for delivery of all materials required.
  - 10. Extended Maintenance Program Documents – as applicable.

#### 1.5 QUALITY ASSURANCE

- A. Source Limitations: Obtain only first-quality components.
- B. Electrical Components, Devices, and Accessories: Listed and labeled as defined in NFPA 70, Article 100, by a testing agency acceptable to authorities having jurisdiction, and marked for intended use.
- C. NFPA Compliance: Select and furnish components of installation meeting applicable sections of the current NFPA regulations.
- D. Product Rating Certifications: Select and furnish components of installation meeting applicable sections of the current industry standard rating/listing/labeling regulations.

#### 1.6 COORDINATION

- A. Coordinate with all trades the placement, support and utility requirements for each major equipment item. This includes, but is not limited to:
  - 1. Existing Floors/Walls/Ceilings/Partitions – coordinate with Owner/Owner's Representative team any proposed disturbances of existing substrates and/or those containing hazardous materials.
  - 2. Wall/Ceiling/Roofing modifications – Contractor to fully-coordinate with each trade involved in the renovation construction affecting existing partitions.

3. Electrical – power wiring, including means of disconnect and planned location/sources of power for replaced/downsized.
  - a. Provide complete installation with NEC/Local Authority panel Clearances as required.
4. Electrical – Updated power wiring.

#### 1.7 WARRANTY PROVISIONS

- A. Basic Installation warranty: Provide Bidder/Manufacturer’s standard forms in which Bidder/manufacturer agrees to repair or replace components of furnished equipment that fails in materials or workmanship. Submit a written warranty signed by Bidder & furnished equipment manufacturer(s) and installer(s) agreeing to furnish labor and parts for failures within a warranty period of Twelve (12) Months from the date of substantial completion/documentated Start-up.

#### 1.8 ALLOWANCES

- A. Proposers are to include an Allowance amount of \$35,000.00, for use in addressing unforeseen conditions/repair-level work discovered during project execution. The Owner, via County FIRM/Palmer Conservation Consulting, has the sole direction that these funds may be used for the project, including justification documentation as required. The Allowances for each bid Item are therefore:
  1. BASE ITEM 1: Forest Rose School HVAC Improvements 2026 = \$35,000.00.

### PART 2 - PRODUCTS & SCOPE CRITERIA

#### 2.1 DESIGN CRITERIA

- A. Provide Complete Final Design for noted project Scope of Work utilizing schematic-phase documentation included from Owner via the OPR Documents published.
  1. Building Code: Current version adopted in applicable County.
  2. Intent: Each design professional utilized in Bidder’s proposal has the liberty to act with the Owner’s best interests in mind, based on the individual situations/boundaries presented before design begins and based on qualified professional experience. The criteria set forth in this specification is intended to be a guideline to limit the risks of dissatisfaction over the Balanced Total Life of this facility/project and to make the tasks associated with long-term owning/managing the facilities as effective as it can be, including the limitation of equipment/service providers to those noted as being Owner-preferred and/or listed within these specifications.
    - a. The merits of this Proposal are not dependent on specific savings in operating energy.
    - b. The merits/VALUE of this proposal with reference to matching of intended Scopes, Construction Schedules anticipated, energy savings and/or operational improvements are key factors in selection/consideration.

## 2.2 BASIC DESIGN AND INSTALLATION REQUIREMENTS

- A. Provide required actions, documents and fees for applicable plan creation and approvals, and all subsequent construction-phase inspections (rough-in, finals, etc.). Coordinate requirements with all members of Owner/Bidder teams & Owner's representatives.

## 2.3 INTERIOR FINISHES

- A. Provide materials for returning interior surfaces to existing conditions according to applications required using industry standard means-and-methods and common best practices.

## 2.4 BASIC MATERIALS AND METHODS

- A. General: Provide materials for completing electrical installations according to applications required (including electrical modification-driven architectural/general trades finishes) using industry standard means-and-methods and common best practices. This provision applies to, but is not limited to:
  - 1. Worker and Occupant Safety Signage.
  - 2. Hangers and Supports.
  - 3. Sealing at penetrations in partitions – appropriate for application.
    - a. Fire Walls: per in-effect codes/requirements.
    - b. Exterior: watertight, vermin-proof.
    - c. Aesthetic: to match finishes affected.
  - 4. Equipment Tagging and Identifying – Black Stencil Markings.

## 2.5 HVAC

- A. General: Provide materials for completing HVAC installations according to applications required using industry standard means-and-methods and common best practices, assuring that each device placement is completely and safely accessible for future maintenance. This provision applies to, but is not limited to:
  - 1. Water Source Heat Pumps.
  - 2. Ductwork and transitions
  - 3. Piping (heat pump and condensation drain)
  - 4. Controls and control valves
  - 5. Shut off valve and heat pump accessories.
  - 6. Disconnect Switches.
- B. Equipment Specifications
  - 1. Water Source Heat Pumps
    - a. Water Source Heat pumps to be Daikin WSHC, single stage compressor, horizontal configuration. Confirm Power Requirements.
  - 2. Piping
    - a. Water source heat pump and condensation drain piping to be copper with pro-press fittings.
  - 3. Insulation

- a. Provide 1” thick fiberglass pipe insulation with all-purpose jacket as manufactured by Johns Manville, Knauf or Owens Corning.

### PART 3 - EXECUTION

#### 3.1 INSTALLATION

- A. General: Arrange installations to provide access space around equipment for service, protection and maintenance. Install so that all access doors/panels are fully operable.
  1. Make provisions to properly remove the existing HVAC equipment and make safe for installation/set of the new equipment. .
- B. Arrange installations to provide access space around equipment for service, protection and maintenance. Install so that all access doors/panels are fully operable.

#### 3.2 FIELD QUALITY CONTROL

- A. Manufacturer's Field Service: Coordinate/Engage factory-authorized service representative to inspect field-assembled components and equipment installation,

#### 3.3 STARTUP SERVICE

- A. Coordinate/Engage a factory-authorized service representative to perform startup service per manufacturer’s instructions and recommendations. Coordinate with County’s Consultants and provide applicable Documentation to Owner.

#### 3.4 FINAL COMMISSIONING

- A. After completion of installations, fully Test each designated system to ensure proper design and operation.

#### 3.5 CLEANING AND SETTING

- A. Clean equipment internally and externally, on completion of installation, according to manufacturer's written instructions and usual & customary practices. Clean equipment interiors to remove foreign material and construction dirt and dust.

#### 3.6 DEMONSTRATION

- A. Coordinate/Engage a factory-authorized service representative to demonstrate/train Owner's maintenance personnel to adjust, operate, and maintain EACH main equipment item & systems installed, including an agreed-to procedure for post-construction service during the Warranty period.

END OF SECTION 10 23 26