

Participating Addendum
23PSX0195

This Participating Addendum ("Participating Addendum" or "Contract") is made by and between the State of Connecticut acting by its Department of Administrative Services ("DAS"), in accordance with sections 4a-2, 4a-51 and 4a-53 of the Connecticut General Statutes, and John Deere Shared Services, LLC ("Contractor").

The Contractor and DAS agree as follows:

1. Subject to Section 2 below, DAS and the Contractor shall be bound by the terms of a certain National Association of State Procurement Officials ("NASPO") master agreement number OK-SW-192-600 entered into between the Contractor and the State of Oklahoma, dated August 29, 2023, (the "Master Agreement") for the purchase of heavy construction and industrial equipment (the "Deliverables").
2. The parties to the Master Agreement assembled what became the Master Agreement by compiling various documents in a sequence that does not follow conventional standards for drafting contracts. For purposes of bringing clarity to this Participating Addendum, the Contractor and DAS have disregarded the unconventional structure of the Master Agreement, including all original pagination, and shall treat the Master Agreement simply as consisting of seventy-three (73) pages which are newly-numbered sequentially in the upper right-hand corner in the format "Page X of 73." The Master Agreement, consisting of those newly-numbered 73 pages, is attached to this Participating Addendum as Exhibit 1 and, as modified by this Participating Addendum, binds DAS and Contractor, but only for purposes of enabling DAS to contract for the Deliverables from Contractor and not to contract for any other purpose.
3. The Contractor and DAS are not bound by any modifications to the Master Agreement dated after the date of this Participating Addendum.
4. For purposes of this Participating Addendum, references in the Master Agreement to Oklahoma shall be interpreted to mean DAS.
5. Order of Precedence
The Contract and Exhibit 1, Master Agreement shall be read to be consistent and complimentary. Any conflict between them shall be resolved by giving priority to the Contract over Exhibit 1, the Master Agreement. No other terms shall apply, including terms listed or referenced in any solicitation documents or in Contractor's response to any solicitation documents.
6. The following sections of Exhibit 1, Master Agreement are deleted in their entirety:

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- a. Section 3 (Contract Documents and Master Agreement Order of Precedence) of the Summary on page 3.
 - b. Section 5 (Governing Laws and Regulations) of the General Terms and Conditions on page 4.
 - c. Section III (Order of Precedence) of Exhibit A, Master Terms and Conditions on pages 7-8.
 - d. Section XII (Indemnification) of Exhibit A, Master Terms and Conditions on pages 17-18.
 - e. Section 14.1 (Records Administration and Audit) of Exhibit A, Master Terms and Conditions on pages 19-20.
 - f. Section 14.2 (Confidentiality, Non-Disclosure, and Injunctive Relief) of Exhibit A, Master Terms and Conditions on pages 20-22.
 - g. Section 14.3 (Assignment/Subcontracts) of Exhibit A, Master Terms and Conditions on page 22.
 - h. Section 14.11 (No Waiver of Sovereign Immunity) of Exhibit A, Master Terms and Conditions on page 25.
 - i. Section 14.12 (Governing Law and Venue) of Exhibit A, Master Terms and Conditions on page 25.
7. The Contractor shall comply with the Connecticut Standard Terms, which are attached as Exhibit 2. As used in this Participating Addendum, the capitalized word "Contract" is deemed to refer to this Participating Addendum and its exhibits.
8. The Contractor shall comply with the Price Schedule, which is attached as Exhibit 3.
9. To the extent that DAS or the Client Agency fails to meet its obligations under this Participating Addendum, the Contractor's exclusive remedies will be to seek redress in accordance with applicable Connecticut law, including the claims commissioner process set forth in Chapter 53 of the Connecticut General Statutes concerning claims against the State.
10. Nothing in Exhibit 1, Master Agreement as modified by this Participating Addendum shall be construed as a modification, compromise or waiver by DAS or the State of Connecticut of any rights or defenses of any immunities provided by Federal law or the laws of the State of Connecticut to the State or any of its officers and employees, which they may have had, now have or will have with respect to all matters arising out of Exhibit 1, Master Agreement as modified by this Participating Addendum. To the extent that this section conflicts with any other section in Exhibit 1, Master Agreement, this section shall govern.
11. Any Client Agency may issue purchase orders against this Participating Addendum. "Client Agency" means any department, commission, board, bureau, agency, institution, public authority, office,

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council, association, instrumentality or political subdivision of the State of Connecticut, non-profit organization organized in the State of Connecticut and any entity identified in Conn. Gen. Stat. Sec. 4a-54, as applicable, who is authorized and chooses to make purchases under, and pursuant to the terms and conditions of, this Participating Addendum.

12. Primary Contacts

State of Connecticut

Name: State of Connecticut, Department of Administrative Services, Procurement Division

Address: 450 Columbus Boulevard, Suite 1202, Hartford, CT 06103

Contact: Daniel Dion

Telephone: (860) 713-5168

Email: daniel.dion@ct.gov

Contractor

Name: John Deere Construction Retail Sales

Address: 1300 River Drive, Moline, IL 61265

Contact: Brooke (Forsberg) DeVol

Telephone: (309) 207-0431

Email: ForsbergBrookeL@JohnDeere.com

13. Orders

Any order placed by a Client Agency shall be deemed to be a sale under and governed by the prices and terms of Exhibit 1, Master Agreement, and this Participating Addendum.

All purchase orders shall contain the references "Master Agreement No. OK-SW-192-600" and "DAS Contract No. 23PSX0195."

[Signature page follows]

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The parties are executing this Participating Addendum on the date below their respective signatures.

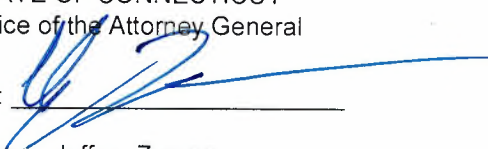
John Deere Shared Services, LLC

By: Julia Watts Digitally signed by Julia Watts
Printed Name: Julia Watts Date: 2025.05.22 15:15:38
Title: Manager of Contract Sales
Date: _____

STATE OF CONNECTICUT
DEPARTMENT OF ADMINISTRATIVE SERVICES

By: Patrick DeConti
Printed Name: Patrick DeConti
Title: Patrick DeConti
Date: May 22, 2025

APPROVED AS TO FORM
STATE OF CONNECTICUT
Office of the Attorney General

BY: 

Name: Jeffrey Zeman
Title: Assistant Attorney General
Date: 6/3/25



OKLAHOMA NASPO VALUEPOINT MASTER AGREEMENT HEAVY CONSTRUCTION & INDUSTRIAL EQUIPMENT

Office of Management and Enterprise Services

Central Purchasing Division

2401 North Lincoln Boulevard

Oklahoma City, OK 73105

And

John Deere Construction Retail Sales

A Division of John Deere Shared Services LLC

1300 River Drive

Moline, IL 61265

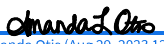
Master Agreement Number: OK-SW-192-600

The Contractor identified below is hereby notified that a contract is being awarded to the Contractor in connection with Solicitation No. OK-SW192, issued December 19, 2022.

NOW, THEREFORE, in consideration of the foregoing and mutual promises set forth herein, the receipt and sufficiency of which are hereby acknowledged the parties have caused this Master Agreement to be duly executed and agree to terms contained herein.

STATE OF OKLAHOMA
by and through the
OFFICE OF MANAGEMENT AND
ENTERPRISE SERVICES

JOHN DEERE CONSTRUCTION RETAIL
SALES A DIVISION OF JOHN DEERE
SHARED SERVICES LLC

By: 
Amanda Otis (Aug 29, 2023 12:44 CDT)

Name: Amanda Otis

Title: State Purchasing Director

Date: Aug 29, 2023

By: 
Brooke DeVol (Aug 29, 2023 12:01 CDT)

Name: Brooke DeVol

Title: Account Manager, Contracts & Sales

Date: Aug 29, 2023

**The person signing for Contractor hereby swears and affirms that he or she is authorized to act on Contractor's behalf and acknowledges that the Lead State is relying on his or her representations to that effect.*

OKLAHOMA NASPO VALUEPOINT MASTER AGREEMENT

SUMMARY

1. **Scope of Work Defined.** The purpose of this Master Agreement is to memorialize terms of the contract under which catalog discount options are provided for heavy construction and industrial equipment for all Participating Entities in furtherance of the NASPO ValuePoint Cooperative Purchasing Program. The objective is to obtain best value, and in some cases achieve more favorable pricing, than is obtainable by an individual state or local government entity because of the collective volume of potential purchases by numerous state and local government entities.
2. **Categories of Products Offered.** This Master Agreement will offer the following categories of products: Heavy Construction and Industrial Equipment.
3. **Contract Documents and Master Agreement Order of Precedence.** Any Order placed under this Master Agreement is governed by and subject to the following contract documents, the terms of which are hereby incorporated:
 - A. Participating Entity's Participating Addendum ("PA");
 - B. Oklahoma NASPO ValuePoint Master Agreement;
 - i. Summary;
 - ii. General Terms, Conditions, and Instructions;
 - iii. Exhibit A, NASPO ValuePoint Terms and Conditions;
 - iv. Exhibit B, Scope of Work; and
 - v. Exhibit C, Price and Cost Proposal.
 - C. A Purchase Order issued against the Master Agreement;
 - D. Request for Proposal; and
 - E. Exhibit D, Contractor's Terms and Conditions Contained in Contractor's Response as Revised and Accepted by The Lead State.

These documents shall be read to be consistent and complementary. Contractor terms and conditions that apply to this Master Agreement are only those that are expressly accepted by the Lead State and attached to this Master Agreement at Exhibit D; however, any conflict among contract documents shall be resolved by giving priority to documents in the order listed above.

OKLAHOMA NASPO VALUEPOINT MASTER AGREEMENT

GENERAL TERMS AND CONDITIONS

1. **Period of Performance.** The initial term of this Master Agreement shall be from the date of award for two (2) years with the option to renew for up to three (3) additional one-year periods.
2. **Renewals.** Prior to any renewal, the Lead State shall subjectively consider the value of the Contract, the Supplier's performance and review of current pricing and discounts offered by Supplier. If it is determined changes to the Master Agreement are required as a condition precedent to renewal, the Lead State and Supplier will cooperate to evidence such required changes in an Addendum.
3. **Extensions.** The Lead State may extend the Master Agreement for ninety (90) days beyond a final renewal term. If exercised, the Lead State shall notify Supplier in writing prior to expiration date. The Lead State, and to the extent allowable by law, may choose to exercise subsequent ninety (90) day extensions at the Agreement pricing rate, to facilitate the finalization of terms and conditions of a new award or as needed for transition to a new Supplier.
4. **Contract Administrator.** The Lead State Contract Administrator identified below is the single point of contact in connection with this Master Agreement and all questions concerning the procurement process, contractual requirements, changes, and any other questions that may arise related to this Master Agreement. The Lead State Contract Administrator designated by the State of Oklahoma, OMES Central Purchasing is:

Lisa Bradley, Statewide Initiatives
Contracting Officer State of Oklahoma,
OMES Central Purchasing
2401 N. Lincoln Blvd.,
Oklahoma City, OK 73105
Lisa.Bradley@omes.ok.gov
Phone: 405-522-4480
5. **Governing Laws and Regulations.** The construction and effect of this Master Agreement is governed by the laws of the state of Oklahoma and venue for any claims or administrative or judicial action relating to such construction and effect including, but not limited to, the procurement process, evaluation and award shall be in Oklahoma County, Oklahoma.

The provisions governing choice of law and venue for issues arising after award and during contract performance are specified in section 35 of the NASPO ValuePoint Terms and Conditions of this Exhibit.

6. **Leasing or Alternative Financing Methods.** The procurement and other applicable laws of some Purchasing Entities may permit the use of leasing or alternative financing methods for the acquisition of products under this Master Agreement. Where the terms and conditions are not otherwise prescribed in an applicable Participating Addendum, the terms and conditions for leasing or alternative financing methods are subject to negotiation between the Contractor and Purchasing Entity.

EXHIBIT A

MASTER TERMS AND CONDITIONS

NASPO VALUEPOINT MASTER AGREEMENT TERMS AND CONDITIONS

I. Definitions

- 1.1 Acceptance** means acceptance of goods and services as set forth in Section IX of this Master Agreement.
- 1.2 Contractor** means a party to this Master Agreement, whether a person or entity, that delivers goods or performs services under the terms set forth in this Master Agreement.
- 1.3 Embedded Software** means one or more software applications which permanently reside on a computing device.
- 1.4 Intellectual Property** means any and all patents, copyrights, service marks, trademarks, trade secrets, trade names, patentable inventions, or other similar proprietary rights, in tangible or intangible form, and all rights, title, and interest therein.
- 1.5 Lead State** means the State centrally administering any resulting Master Agreement(s) who is a party to this Master Agreement.
- 1.6 Master Agreement** means the underlying agreement executed by and between the Lead State, acting in cooperation with NASPO ValuePoint, and the Contractor, as now or hereafter amended.
- 1.7 NASPO ValuePoint** is a division of the National Association of State Procurement Officials (“NASPO”), a 501(c)(3) corporation. NASPO ValuePoint facilitates administration of the NASPO cooperative group contracting consortium of state chief procurement officials for the benefit of state departments, institutions, agencies, and political subdivisions and other eligible entities (i.e., colleges, school districts, counties, cities, some nonprofit organizations, etc.) for all states, the District of Columbia, and territories of the United States. NASPO ValuePoint is identified in the Master Agreement as the recipient of reports and may perform contract administration functions relating to collecting and receiving reports, as well as other contract administration functions as assigned by the Lead State.
- 1.8 Order or Purchase Order** means any purchase order, sales order, contract or other document used by a Purchasing Entity to order the Products.
- 1.9 Participating Addendum** means a bilateral agreement executed by a Contractor and a Participating Entity incorporating this Master Agreement and any additional Participating Entity-specific language or other requirements (e.g., ordering procedures specific to the Participating Entity, entity-specific terms and conditions, etc.).
- 1.10 Participating Entity** means a state (as well as the District of Columbia and US territories), city, county, district, other political subdivision of a State, or a

nonprofit organization under the laws of some states properly authorized to enter into a Participating Addendum, that has executed a Participating Addendum.

- 1.11 Participating State** means a state that has executed a Participating Addendum or has indicated an intent to execute a Participating Addendum.
- 1.12 Product or Products and Services** means any equipment, software (including embedded software), documentation, service, or other deliverable supplied or created by the Contractor pursuant to this Master Agreement. The term Product includes goods and services.
- 1.13 Purchasing Entity** means a state (as well as the District of Columbia and US territories), city, county, district, other political subdivision of a State, or a nonprofit organization under the laws of some states if authorized by a Participating Addendum, that issues a Purchase Order against the Master Agreement and becomes financially committed to the purchase.

II. Term of Master Agreement

- 2.1 Initial Term.** The initial term of this Master Agreement is for two years. The term of this Master Agreement may be amended beyond the initial term for 3 additional years at the Lead State's discretion and by mutual agreement and upon review of requirements of Participating Entities, current market conditions, and Contractor performance. The Lead State may, prior to execution, adjust the effective date or duration of the initial term or renewal period of any Master Agreement for the purpose of making the Master Agreement coterminous with others.
- 2.2 Amendment Limitations.** The terms of this Master Agreement will not be waived, altered, modified, supplemented, or amended in any manner whatsoever without prior written agreement of the Lead State and Contractor.
- 2.3 Amendment Term.** The term of the Master Agreement may be amended past the initial term and stated renewal periods for a reasonable period if in the judgment of the Lead State a follow-on competitive procurement will be unavoidably delayed (despite good faith efforts) beyond the planned date of execution of the follow-on master agreement. This subsection will not be deemed to limit the authority of a Lead State under its state law to otherwise negotiate contract extensions.

III. Order of Precedence

- 3.1 Order.** Any Order placed under this Master Agreement will consist of the following documents:
 - 3.1.1** A Participating Entity's Participating Addendum ("PA");
 - 3.1.2** NASPO ValuePoint Master Agreement, including all attachments thereto;
 - 3.1.3** A Purchase Order or Scope of Work/Specifications issued against the Master Agreement;
 - 3.1.4** The Solicitation or, if separately executed after award, the Lead State's bilateral agreement that integrates applicable provisions;
 - 3.1.5** Contractor's response to the Solicitation, as revised (if permitted) and accepted by the Lead State.

- 3.2 Conflict.** These documents will be read to be consistent and complementary. Any conflict among these documents will be resolved by giving priority to these documents in the order listed above. Contractor terms and conditions that apply to this Master Agreement are only those that are expressly accepted by the Lead State and must be in writing and attached to this Master Agreement as an Exhibit or Attachment.
- 3.3 Participating Addenda.** Participating Addenda will not be construed to diminish, modify, or otherwise derogate any provisions in this Master Agreement between the Lead State and Contractor. Participating Addenda will not include a term of agreement that exceeds the term of the Master Agreement.

IV. Participants and Scope

- 4.1 Requirement for a Participating Addendum.** Contractor may not deliver Products under this Master Agreement until a Participating Addendum acceptable to the Participating Entity and Contractor is executed.
- 4.2 Applicability of Master Agreement.** NASPO ValuePoint Master Agreement Terms and Conditions are applicable to any Order by a Participating Entity (and other Purchasing Entities covered by their Participating Addendum), except to the extent altered, modified, supplemented or amended by a Participating Addendum, subject to Section III. For the purposes of illustration and not limitation, this authority may apply to unique delivery and invoicing requirements, confidentiality requirements, defaults on Orders, governing law and venue relating to Orders by a Participating Entity, indemnification, and insurance requirements. Statutory or constitutional requirements relating to availability of funds may require specific language in some Participating Addenda in order to comply with applicable law. The expectation is that these alterations, modifications, supplements, or amendments will be addressed in the Participating Addendum or, with the consent of the Purchasing Entity and Contractor, may be included in the ordering document (e.g., purchase order or contract) used by the Purchasing Entity to place the Order.
- 4.3 Authorized Use.** Use of specific NASPO ValuePoint Master Agreements by state agencies, political subdivisions and other Participating Entities is subject to applicable state law and the approval of the respective State Chief Procurement Official. Issues of interpretation and eligibility for participation are solely within the authority of the respective State Chief Procurement Official.
- 4.4 Obligated Entities.** Obligations under this Master Agreement are limited to those Participating Entities who have signed a Participating Addendum and Purchasing Entities within the scope of those Participating Addenda. States or other entities permitted to participate may use an informal competitive process to determine which Master Agreements to participate in through execution of a Participating Addendum. Participating Entities incur no financial obligations on behalf of other Purchasing Entities.
- 4.5 Notice of Participating Addendum.** Contractor shall email a fully executed PDF copy of each Participating Addendum to pa@naspovaluepoint.org to support documentation of participation and posting in appropriate databases.
- 4.6 Eligibility for a Participating Addendum.** Eligible entities who are not states may under some circumstances sign their own Participating Addendum, subject to the consent of the Chief Procurement Official of the state where the entity is

located. Coordinate requests for such participation through NASPO ValuePoint. Any permission to participate through execution of a Participating Addendum is not a determination that procurement authority exists; the entity must ensure that they have the requisite procurement authority to execute a Participating Addendum.

- 4.7 Prohibition on Resale.** Subject to any specific conditions included in the solicitation or Contractor's proposal as accepted by the Lead State, or as explicitly permitted in a Participating Addendum, Purchasing Entities may not resell Products purchased under this Master Agreement. Absent any such condition or explicit permission, this limitation does not prohibit payments by employees of a Purchasing Entity for Products; sales of Products to the general public as surplus property; and fees associated with inventory transactions with other governmental or nonprofit entities and consistent with a Purchasing Entity's laws and regulations. Any sale or transfer permitted by this subsection must be consistent with license rights granted for use of intellectual property.
- 4.8 Individual Customers.** Except as may otherwise be agreed to by the Purchasing Entity and Contractor, each Purchasing Entity shall follow the terms and conditions of the Master Agreement and applicable Participating Addendum and will have the same rights and responsibilities for their purchases as the Lead State has in the Master Agreement and as the Participating Entity has in the Participating Addendum, including but not limited to any indemnity or right to recover any costs as such right is defined in the Master Agreement and applicable Participating Addendum for their purchases. Each Purchasing Entity will be responsible for its own charges, fees, and liabilities. The Contractor will apply the charges and invoice each Purchasing Entity individually.
- 4.9 Release of Information.** Throughout the duration of this Master Agreement, Contractor must secure from the Lead State prior approval for the release of information that pertains to the potential work or activities covered by the Master Agreement. This limitation does not preclude publication about the award of the Master Agreement or marketing activities consistent with any proposed and accepted marketing plan.
- 4.10 No Representations.** The Contractor shall not make any representations of NASPO ValuePoint, the Lead State, any Participating Entity, or any Purchasing Entity's opinion or position as to the quality or effectiveness of the services that are the subject of this Master Agreement without prior written consent.

V. NASPO ValuePoint Provisions

- 5.1 Applicability.** NASPO ValuePoint is not a party to the Master Agreement. The terms set forth in Section V are for the benefit of NASPO ValuePoint as a third-party beneficiary of this Master Agreement.
- 5.2 Administrative Fees**
- 5.2.1 NASPO ValuePoint Fee.** Contractor shall pay to NASPO ValuePoint, or its assignee, a NASPO ValuePoint Administrative Fee of one-quarter of one percent (0.25% or 0.0025) no later than sixty (60) days following the end of each calendar quarter. The NASPO ValuePoint Administrative Fee must be submitted quarterly and is based on all sales of products and services under the Master Agreement (less any charges for taxes or shipping). The NASPO ValuePoint Administrative Fee is not negotiable.

This fee is to be included as part of the pricing submitted with a vendor's response to the Lead State's solicitation.

- 5.2.2 State Imposed Fees.** Some states may require an additional fee be paid by Contractor directly to the state on purchases made by Purchasing Entities within that state. For all such requests, the fee rate or amount, payment method, and schedule for such reports and payments will be incorporated into the applicable Participating Addendum. Unless agreed to in writing by the state, Contractor may not adjust the Master Agreement pricing to include the state fee for purchases made by Purchasing Entities within the jurisdiction of the state. No such agreement will affect the NASPO ValuePoint Administrative Fee percentage or the prices paid by Purchasing Entities outside the jurisdiction of the state requesting the additional fee.

5.3 NASPO ValuePoint Summary and Detailed Usage Reports

- 5.3.1 Sales Data Reporting.** In accordance with this section, Contractor shall report to NASPO ValuePoint all Orders under this Master Agreement for which Contractor has invoiced the ordering entity or individual, including Orders invoiced to Participating Entity or Purchasing Entity employees for personal use if such use is permitted by this Master Agreement and the applicable Participating Addendum ("Sales Data"). Timely and complete reporting of Sales Data is a material requirement of this Master Agreement. Reporting requirements, including those related to the format, contents, frequency, or delivery of reports, may be updated by NASPO ValuePoint with reasonable notice to Contractor and without amendment to this Master Agreement. NASPO ValuePoint shall have exclusive ownership of any media on which reports are submitted and shall have a perpetual, irrevocable, non-exclusive, royalty free, and transferable right to display, modify, copy, and otherwise use reports, data, and information provided under this section.
- 5.3.2 Summary Sales Data.** "Summary Sales Data" is Sales Data reported as cumulative totals by state. Contractor shall, using the reporting tool or template provided by NASPO ValuePoint, report Summary Sales Data to NASPO ValuePoint for each calendar quarter no later than thirty (30) days following the end of the quarter. If Contractor has no reportable Sales Data for the quarter, Contractor shall submit a zero-sales report.
- 5.3.3 Detailed Sales Data.** "Detailed Sales Data" is Sales Data that includes for each Order all information required by the Solicitation or by NASPO ValuePoint, including customer information, Order information, and line-item details. Contractor shall, using the reporting tool or template provided by NASPO ValuePoint, report Detailed Sales Data to NASPO ValuePoint for each calendar quarter no later than thirty (30) days following the end of the quarter. Detailed Sales Data shall be reported in the format provided in the Solicitation or provided by NASPO ValuePoint. The total sales volume of reported Detailed Sales Data shall be consistent with the total sales volume of reported Summary Sales Data.
- 5.3.4 Sales Data Crosswalks.** Upon request by NASPO ValuePoint, Contractor shall provide to NASPO ValuePoint tables of customer and Product

information and specific attributes thereof for the purpose of standardizing and analyzing reported Sales Data (“Crosswalks”). Customer Crosswalks must include a list of existing and potential Purchasing Entities and identify for each the appropriate customer type as defined by NASPO ValuePoint. Product Crosswalks must include Contractor’s part number or SKU for each Product in Offeror’s catalog and identify for each the appropriate Master Agreement category (and subcategory, if applicable), manufacturer part number, product description, eight-digit UNSPSC Class Level commodity code, and (if applicable) EPEAT value and Energy Star rating. Crosswalk requirements and fields may be updated by NASPO ValuePoint with reasonable notice to Contractor and without amendment to this Master Agreement. Contractor shall work in good faith with NASPO ValuePoint to keep Crosswalks updated as Contractor’s customer lists and product catalog change.

5.3.5 Executive Summary. Contractor shall, upon request by NASPO ValuePoint, provide NASPO ValuePoint with an executive summary that includes but is not limited to a list of states with an active Participating Addendum, states with which Contractor is in negotiations, and any Participating Addendum roll-out or implementation activities and issues. NASPO ValuePoint and Contractor will determine the format and content of the executive summary.

5.4 NASPO ValuePoint Cooperative Program Marketing, Training, and Performance Review

5.4.1 Staff Education. Contractor shall work cooperatively with NASPO ValuePoint personnel. Contractor shall present plans to NASPO ValuePoint for the education of Contractor’s contract administrator(s) and sales/marketing workforce regarding the Master Agreement contract, including the competitive nature of NASPO ValuePoint procurements, the master agreement and participating addendum process, and the manner in which eligible entities can participate in the Master Agreement.

5.4.2 Onboarding Plan. Upon request by NASPO ValuePoint, Contractor shall, as Participating Addendums are executed, provide plans to launch the program for the Participating Entity. Plans will include time frames to launch the agreement and confirmation that the Contractor’s website has been updated to properly reflect the scope and terms of the Master Agreement as available to the Participating Entity and eligible Purchasing Entities.

5.4.3 Annual Contract Performance Review. Contractor shall participate in an annual contract performance review with the Lead State and NASPO ValuePoint, which may at the discretion of the Lead State be held in person and which may include a discussion of marketing action plans, target strategies, marketing materials, Contractor reporting, and timeliness of payment of administration fees.

5.4.4 Use of NASPO ValuePoint Logo. The NASPO ValuePoint logos may not be used by Contractor in sales and marketing until a separate logo use agreement is executed with NASPO ValuePoint.

5.4.5 Most Favored Customer. Contractor shall, within thirty (30) days of their effective date, notify the Lead State and NASPO ValuePoint of any contractual most-favored-customer provisions in third-party contracts or agreements that may affect the promotion of this Master Agreement or whose terms provide for adjustments to future rates or pricing based on rates, pricing in, or Orders from this Master Agreement. Upon request of the Lead State or NASPO ValuePoint, Contractor shall provide a copy of any such provisions.

5.5 Cancellation. In consultation with NASPO ValuePoint, the Lead State may, in its discretion, cancel the Master Agreement or not exercise an option to renew, when utilization of Contractor's Master Agreement does not warrant further administration of the Master Agreement. The Lead State may also exercise its right to not renew the Master Agreement if vendor fails to record or report revenue for three consecutive quarters, upon 60-calendar day written notice to the Contractor. Cancellation based on nonuse or under-utilization will not occur sooner than [two years] after execution of the Master Agreement. This subsection does not limit the discretionary right of either the Lead State or Contractor to cancel the Master Agreement or terminate for default subject to the terms herein. This subsection also does not limit any right of the Lead State to cancel the Master Agreement under applicable laws.

5.6 Canadian Participation. Subject to the approval of Contractor, any Canadian provincial government or provincially funded entity in Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland and Labrador, Nova Scotia, Ontario, Prince Edward Island, Quebec, or Saskatchewan, and territorial government or territorial government funded entity in the Northwest Territories, Nunavut, or Yukon, including municipalities, universities, community colleges, school boards, health authorities, housing authorities, agencies, boards, commissions, and crown corporations, may be eligible to use Contractor's Master Agreement.

5.7 Additional Agreement with NASPO. Upon request by NASPO ValuePoint, awarded Contractor shall enter into a direct contractual relationship with NASPO ValuePoint related to Contractor's obligations to NASPO ValuePoint under the terms of the Master Agreement, the terms of which shall be the same or similar (and not less favorable) than the terms set forth in the Master Agreement.

VI. Pricing, Payment & Leasing

6.1 Pricing. The prices contained in this Master Agreement or offered under this Master Agreement represent the not-to-exceed price to any Purchasing Entity.

6.1.1 All prices and rates must be guaranteed for the initial term of the Master Agreement.

6.1.2 Following the initial term of the Master Agreement, any request for a price or rate adjustment must be for an equal guarantee period and must be made at least thirty (30) days prior to the effective date.

6.1.3 Requests for a price or rate adjustment must include sufficient documentation supporting the request. Any adjustment or amendment to the Master Agreement will not be effective unless approved in writing by the Lead State.

6.1.4 No retroactive adjustments to prices or rates will be allowed.

- 6.2 Payment.** Unless otherwise agreed upon in a Participating Addendum or Order, Payment after Acceptance will be made within thirty (30) days following the date the entire order is delivered or the date a correct invoice is received, whichever is later. After 45 days the Contractor may assess overdue account charges up to a maximum rate of one percent per month on the outstanding balance, unless a different late payment amount is specified in a Participating Addendum or Order, or otherwise prescribed by applicable law. Payments will be remitted in the manner specified in the Participating Addendum or Order. Payments may be made via a purchasing card with no additional charge.
- 6.3 Leasing or Alternative Financing Methods.** The procurement and other applicable laws of some Purchasing Entities may permit the use of leasing or alternative financing methods for the acquisition of Products under this Master Agreement. Where the terms and conditions are not otherwise prescribed in an applicable Participating Addendum, the terms and conditions for leasing or alternative financing methods are subject to negotiation between the Contractor and Purchasing Entity.

VII. Ordering

- 7.1 Order Numbers.** Master Agreement order and purchase order numbers must be clearly shown on all acknowledgments, packing slips, invoices, and on all correspondence.
- 7.2 Quotes.** Purchasing Entities may define entity-specific or project-specific requirements and informally compete the requirement among companies having a Master Agreement on an “as needed” basis. This procedure may also be used when requirements are aggregated, or other firm commitments may be made to achieve reductions in pricing. This procedure may be modified in Participating Addenda and adapted to the Purchasing Entity’s rules and policies. The Purchasing Entity may in its sole discretion determine which Master Agreement Contractors should be solicited for a quote. The Purchasing Entity may select the quote that it considers most advantageous, cost, and other factors considered.
- 7.3 Applicable Rules.** Each Purchasing Entity will identify and utilize its own appropriate purchasing procedure and documentation. Contractor is expected to become familiar with the Purchasing Entities’ rules, policies, and procedures regarding the ordering of supplies and/or services contemplated by this Master Agreement.
- 7.4 Required Documentation.** Contractor shall not begin work without a valid Purchase Order or other appropriate commitment document under the law of the Purchasing Entity.
- 7.5 Term of Purchase.** Orders may be placed consistent with the terms of this Master Agreement and applicable Participating Addendum during the term of the Master Agreement and Participating Addendum.
- 7.5.1** Orders must be placed pursuant to this Master Agreement prior to the termination date thereof but may have a delivery date or performance period up to 120 days past the then-current termination date of this Master Agreement.

- 7.5.2 Notwithstanding the previous, Orders must also comply with the terms of the applicable Participating Addendum, which may further restrict the period during which Orders may be placed or delivered.
- 7.5.3 Financial obligations of Purchasing Entities payable after the current applicable fiscal year are contingent upon agency funds for that purpose being appropriated, budgeted, and otherwise made available.
- 7.5.4 Notwithstanding the expiration, cancellation or termination of this Master Agreement, Contractor shall perform in accordance with the terms of any Orders then outstanding at the time of such expiration or termination. Contractor shall not honor any Orders placed after the expiration, cancellation, or termination of this Master Agreement, or in any manner inconsistent with this Master Agreement's terms.
- 7.5.5 Orders for any separate indefinite quantity, task order, or other form of indefinite delivery order arrangement priced against this Master Agreement may not be placed after the expiration or termination of this Master Agreement, notwithstanding the term of any such indefinite delivery order agreement.
- 7.6 **Order Form Requirements.** All Orders pursuant to this Master Agreement, at a minimum, must include:
 - 7.6.1 The services or supplies being delivered;
 - 7.6.2 A shipping address and other delivery requirements, if any;
 - 7.6.3 A billing address;
 - 7.6.4 Purchasing Entity contact information;
 - 7.6.5 Pricing consistent with this Master Agreement and applicable Participating Addendum and as may be adjusted by agreement of the Purchasing Entity and Contractor;
 - 7.6.6 A not-to-exceed total for the products or services being ordered; and
 - 7.6.7 The Master Agreement number or the applicable Participating Addendum number, provided the Participating Addendum references the Master Agreement number.
- 7.7 **Communication.** All communications concerning administration of Orders placed must be furnished solely to the authorized purchasing agent within the Purchasing Entity's purchasing office, or to such other individual identified in writing in the Order.
- 7.8 **Contract Provisions for Orders Utilizing Federal Funds.** Pursuant to Appendix II to 2 Code of Federal Regulations (CFR) Part 200, Contract Provisions for Non-Federal Entity Contracts Under Federal Awards, Orders funded with federal funds may have additional contractual requirements or certifications that must be satisfied at the time the Order is placed or upon delivery. These federal requirements may be proposed by Participating Entities in Participating Addenda and Purchasing Entities for incorporation in Orders placed under this Master Agreement.

VIII. Shipping and Delivery

- 8.1 Shipping Terms.** All deliveries will be F.O.B. destination, freight pre-paid, with all transportation and handling charges paid by the Contractor.
- 8.1.1** Notwithstanding the above, responsibility and liability for loss or damage will remain the Contractor's until final inspection and acceptance when responsibility will pass to the Purchasing Entity except as to latent defects, fraud, and Contractor's warranty obligations.
- 8.2 Minimum Shipping.** The minimum shipment amount, if any, must be contained in the Master Agreement. Any order for less than the specified amount is to be shipped with the freight prepaid and added as a separate item on the invoice. Any portion of an Order to be shipped without transportation charges that is back ordered will be shipped without charge.
- 8.3 Inside Deliveries.** To the extent applicable, all deliveries will be "Inside Deliveries" as designated by a representative of the Purchasing Entity placing the Order. Inside Delivery refers to a delivery to a location other than a loading dock, front lobby, or reception area. Specific delivery instructions will be noted on the order form or Purchase Order. Costs to repair any damage to the building interior (e.g., scratched walls, damage to the freight elevator, etc.) caused by Contractor or Contractor's carrier will be the responsibility of the Contractor. Immediately upon becoming aware of such damage, Contractor shall notify the Purchasing Entity placing the Order.
- 8.4 Packaging.** All products must be delivered in the manufacturer's standard package. Costs must include all packing and/or crating charges. Cases must be of durable construction, in good condition, properly labeled and suitable in every respect for storage and handling of contents. Each shipping carton must be marked with the commodity, brand, quantity, item code number and the Purchasing Entity's Purchase Order number.

IX. Inspection and Acceptance

- 9.1 Laws and Regulations.** Any and all Products offered and furnished must comply fully with all applicable Federal, State, and local laws and regulations.
- 9.2 Applicability.** Unless otherwise specified in the Master Agreement, Participating Addendum, or ordering document, the terms of this Section IX will apply. This section is not intended to limit rights and remedies under the applicable commercial code.
- 9.3 Inspection.** All Products are subject to inspection at reasonable times and places before Acceptance. Contractor shall provide right of access to the Lead State, or to any other authorized agent or official of the Lead State or other Participating or Purchasing Entity, at reasonable times, to monitor and evaluate performance, compliance, and/or quality assurance requirements under this Master Agreement.
- 9.3.1** Products that do not meet specifications may be rejected. Failure to reject upon receipt, however, does not relieve the contractor of liability for material (nonconformity that substantial impairs value) latent or hidden defects subsequently revealed when goods are put to use.
- 9.3.2** Acceptance of such goods may be revoked in accordance with the provisions of the applicable commercial code, and the Contractor is liable

for any resulting expense incurred by the Purchasing Entity related to the preparation and shipping of Product rejected and returned, or for which Acceptance is revoked.

- 9.4 Failure to Conform.** If any services do not conform to contract requirements, the Purchasing Entity may require the Contractor to perform the services again in conformity with contract requirements, at no increase in Order amount. When defects cannot be corrected by re-performance, the Purchasing Entity may require the Contractor to take necessary action to ensure that future performance conforms to contract requirements and reduce the contract price to reflect the reduced value of services performed.
- 9.5 Acceptance Testing.** Purchasing Entity may establish a process, in keeping with industry standards, to ascertain whether the Product meets the standard of performance or specifications prior to Acceptance by the Purchasing Entity.
- 9.5.1** The Acceptance Testing period will be thirty (30) calendar days, unless otherwise specified, starting from the day after the Product is delivered or, if installed by Contractor, the day after the Product is installed and Contractor certifies that the Product is ready for Acceptance Testing.
- 9.5.2** If the Product does not meet the standard of performance or specifications during the initial period of Acceptance Testing, Purchasing Entity may, at its discretion, continue Acceptance Testing on a day-to-day basis until the standard of performance is met.
- 9.5.3** Upon rejection, the Contractor will have fifteen (15) calendar days to cure. If after the cure period, the Product still has not met the standard of performance or specifications, the Purchasing Entity may, at its option: (a) declare Contractor to be in breach and terminate the Order; (b) demand replacement Product from Contractor at no additional cost to Purchasing Entity; or, (c) continue the cure period for an additional time period agreed upon by the Purchasing Entity and the Contractor.
- 9.5.4** Contractor shall pay all costs related to the preparation and shipping of Product returned pursuant to the section.
- 9.5.5** No Product will be deemed Accepted and no charges will be paid until the standard of performance or specification is met.

X. Warranty

- 10.1 Applicability.** Unless otherwise specified in the Master Agreement, Participating Addendum, or ordering document, the terms of this Section X will apply.
- 10.2 Warranty.** The Contractor warrants for a period of one year from the date of Acceptance that: (a) the Product performs according to all specific claims that the Contractor made in its response to the solicitation, (b) the Product is suitable for the ordinary purposes for which such Product is used, (c) the Product is suitable for any special purposes identified in the solicitation or for which the Purchasing Entity has relied on the Contractor's skill or judgment, (d) the Product is designed and manufactured in a commercially reasonable manner, and (e) the Product is free of defects.
- 10.3 Breach of Warranty.** Upon breach of the warranty set forth above, the Contractor will repair or replace (at no charge to the Purchasing Entity) the

Product whose nonconformance is discovered and made known to the Contractor. If the repaired and/or replaced Product proves to be inadequate, or fails of its essential purpose, the Contractor will refund the full amount of any payments that have been made.

- 10.4 Rights Reserved.** The rights and remedies of the parties under this warranty are in addition to any other rights and remedies of the parties provided by law or equity, including, without limitation, actual damages, and, as applicable and awarded under the law, to a prevailing party, reasonable attorneys' fees and costs.
- 10.5 Warranty Period Start Date.** The warranty period will begin upon Acceptance, as set forth in Section IX.

XI. Product Title

- 11.1 Conveyance of Title.** Upon Acceptance by the Purchasing Entity, Contractor shall convey to Purchasing Entity title to the Product free and clear of all liens, encumbrances, or other security interests.
- 11.2 Embedded Software.** Transfer of title to the Product must include an irrevocable and perpetual license to use any Embedded Software in the Product. If Purchasing Entity subsequently transfers title of the Product to another entity, Purchasing Entity shall have the right to transfer the license to use the Embedded Software with the transfer of Product title. A subsequent transfer of this software license will be at no additional cost or charge to either Purchasing Entity or Purchasing Entity's transferee.
- 11.3 License of Pre-Existing Intellectual Property.** Contractor grants to the Purchasing Entity a nonexclusive, perpetual, royalty-free, irrevocable, license to use, publish, translate, reproduce, transfer with any sale of tangible media or Product, perform, display, and dispose of the Intellectual Property, and its derivatives, used or delivered under this Master Agreement, but not created under it ("Pre-existing Intellectual Property"). The Contractor shall be responsible for ensuring that this license is consistent with any third-party rights in the Pre-existing Intellectual Property.

XII. Indemnification

- 12.1 General Indemnification.** The Contractor shall defend, indemnify and hold harmless NASPO, NASPO ValuePoint, the Lead State, Participating Entities, and Purchasing Entities, along with their officers and employees, from and against third-party claims, damages or causes of action including reasonable attorneys' fees and related costs for any death, injury, or damage to tangible property arising from any act, error, or omission of the Contractor, its employees or subcontractors or volunteers, at any tier, relating to performance under this Master Agreement.
- 12.2 Intellectual Property Indemnification.** The Contractor shall defend, indemnify and hold harmless NASPO, NASPO ValuePoint, the Lead State, Participating Entities, Purchasing Entities, along with their officers and employees ("Indemnified Party"), from and against claims, damages or causes of action including reasonable attorneys' fees and related costs arising out of the claim that

the Product or its use infringes Intellectual Property rights of another person or entity ("Intellectual Property Claim").

- 12.2.1** The Contractor's obligations under this section will not extend to any combination of the Product with any other product, system or method, unless the Product, system or method is:
 - 12.2.1.1** provided by the Contractor or the Contractor's subsidiaries or affiliates;
 - 12.2.1.2** specified by the Contractor to work with the Product;
 - 12.2.1.3** reasonably required to use the Product in its intended manner, and the infringement could not have been avoided by substituting another reasonably available product, system or method capable of performing the same function; or
 - 12.2.1.4** reasonably expected to be used in combination with the Product.
- 12.2.2** The Indemnified Party shall notify the Contractor within a reasonable time after receiving notice of an Intellectual Property Claim. Even if the Indemnified Party fails to provide reasonable notice, the Contractor shall not be relieved from its obligations unless the Contractor can demonstrate that it was prejudiced in defending the Intellectual Property Claim resulting in increased expenses or loss to the Contractor. If the Contractor promptly and reasonably investigates and defends any Intellectual Property Claim, it shall have control over the defense and settlement of the Intellectual Property Claim. However, the Indemnified Party must consent in writing for any money damages or obligations for which it may be responsible.
- 12.2.3** The Indemnified Party shall furnish, at the Contractor's reasonable request and expense, information, and assistance necessary for such defense. If the Contractor fails to vigorously pursue the defense or settlement of the Intellectual Property Claim, the Indemnified Party may assume the defense or settlement of the Intellectual Property Claim and the Contractor shall be liable for all costs and expenses, including reasonable attorneys' fees and related costs, incurred by the Indemnified Party in the pursuit of the Intellectual Property Claim.
- 12.2.4** Unless otherwise set forth herein, Section 12.2 is not subject to any limitations of liability in this Master Agreement or in any other document executed in conjunction with this Master Agreement.

XIII. Insurance

- 13.1 Term.** Contractor shall, during the term of this Master Agreement, maintain in full force and effect, the insurance described in this section. A Participating Entity may negotiate alternative Insurance requirements in their Participating Addendum.
- 13.2 Class.** Contractor shall acquire such insurance from an insurance carrier or carriers licensed to conduct business in each Participating Entity's state and having a rating of A-, Class VII or better, in the most recently published edition of

A.M. Best's Insurance Reports. Failure to buy and maintain the required insurance may result in this Master Agreement's termination or, at a Participating Entity's option, result in termination of its Participating Addendum.

- 13.3 Coverage.** Coverage must be written on an occurrence basis. The minimum acceptable limits will be as indicated below:
- 13.3.1** Contractor shall maintain Commercial General Liability insurance covering premises operations, independent contractors, products and completed operations, blanket contractual liability, personal injury (including death), advertising liability, and property damage, with a limit of not less than \$1 million per occurrence and \$2 million general aggregate;
- 13.3.2** Contractor must comply with any applicable State Workers Compensation or Employers Liability Insurance requirements.
- 13.4 Notice of Cancellation.** Contractor shall pay premiums on all insurance policies. Contractor shall provide notice to a Participating Entity who is a state within five (5) business days after Contractor is first aware of expiration, cancellation or nonrenewal of such policy or is first aware that cancellation is threatened or expiration, nonrenewal or expiration otherwise may occur.
- 13.5 Notice of Endorsement.** Prior to commencement of performance, Contractor shall provide to the Lead State a written endorsement to the Contractor's general liability insurance policy or other documentary evidence acceptable to the Lead State that (1) provides that written notice of cancellation will be delivered in accordance with the policy provisions, and (2) provides that the Contractor's liability insurance policy will be primary, with any liability insurance of any Participating State as secondary and noncontributory.
- 13.6 Participating Entities.** Contractor shall provide to Participating States and Participating Entities the same insurance obligations and documentation as those specified in Section XIII, except the endorsement is provided to the applicable Participating State or Participating Entity.
- 13.7 Furnishing of Certificates.** Contractor shall furnish to the Lead State copies of certificates of all required insurance in a form sufficient to show required coverage within thirty (30) calendar days of the execution of this Master Agreement and prior to performing any work. Copies of renewal certificates of all required insurance will be furnished within thirty (30) days after any renewal date to the applicable state Participating Entity. Failure to provide evidence of coverage may, at the sole option of the Lead State, or any Participating Entity, result in this Master Agreement's termination or the termination of any Participating Addendum.
- 13.8 Disclaimer.** Insurance coverage and limits will not limit Contractor's liability and obligations under this Master Agreement, any Participating Addendum, or any Purchase Order.

XIV. General Provisions

14.1 Records Administration and Audit

- 14.1.1** The Contractor shall maintain books, records, documents, and other evidence pertaining to this Master Agreement and Orders placed by

Purchasing Entities under it to the extent and in such detail as will adequately reflect performance and administration of payments and fees. Contractor shall permit the Lead State, a Participating Entity, a Purchasing Entity, the federal government (including its grant awarding entities and the U.S. Comptroller General), and any other duly authorized agent of a governmental agency, to audit, inspect, examine, copy and/or transcribe Contractor's books, documents, papers and records directly pertinent to this Master Agreement or orders placed by a Purchasing Entity under it for the purpose of making audits, examinations, excerpts, and transcriptions. This right will survive for a period of six (6) years following termination of this Agreement or final payment for any order placed by a Purchasing Entity against this Master Agreement, whichever is later, or such longer period as is required by the Purchasing Entity's state statutes, to assure compliance with the terms hereof or to evaluate performance hereunder.

- 14.1.2** Without limiting any other remedy available to any governmental entity, the Contractor shall reimburse the applicable Lead State, Participating Entity, or Purchasing Entity for any overpayments inconsistent with the terms of the Master Agreement or Orders or underpayment of fees found as a result of the examination of the Contractor's records.
- 14.1.3** The rights and obligations herein exist in addition to any quality assurance obligation in the Master Agreement that requires the Contractor to self-audit contract obligations and that permits the Lead State to review compliance with those obligations.

14.2 Confidentiality, Non-Disclosure, and Injunctive Relief

- 14.2.1 Confidentiality.** Contractor acknowledges that it and its employees or agents may, in the course of providing a Product under this Master Agreement, be exposed to or acquire information that is confidential to Purchasing Entity or Purchasing Entity's clients.

- 14.2.1.1** Any and all information of any form that is marked as confidential or would by its nature be deemed confidential obtained by Contractor or its employees or agents in the performance of this Master Agreement, including but not necessarily limited to (1) any Purchasing Entity's records, (2) personnel records, and (3) information concerning individuals, is confidential information of Purchasing Entity ("Confidential Information").

- 14.2.1.2** Any reports or other documents or items (including software) that result from the use of the Confidential Information by Contractor shall be treated in the same manner as the Confidential Information.

- 14.2.1.3** Confidential Information does not include information that (1) is or becomes (other than by disclosure by Contractor) publicly known; (2) is furnished by Purchasing Entity to others without restrictions similar to those imposed by this

Master Agreement; (3) is rightfully in Contractor's possession without the obligation of nondisclosure prior to the time of its disclosure under this Master Agreement; (4) is obtained from a source other than Purchasing Entity without the obligation of confidentiality, (5) is disclosed with the written consent of Purchasing Entity; or (6) is independently developed by employees, agents or subcontractors of Contractor who can be shown to have had no access to the Confidential Information.

14.2.2 Non-Disclosure. Contractor shall hold Confidential Information in confidence, using at least the industry standard of confidentiality, and shall not copy, reproduce, sell, assign, license, market, transfer or otherwise dispose of, give, or disclose Confidential Information to third parties or use Confidential Information for any purposes whatsoever other than what is necessary to the performance of Orders placed under this Master Agreement.

14.2.2.1 Contractor shall advise each of its employees and agents of their obligations to keep Confidential Information confidential. Contractor shall use commercially reasonable efforts to assist Purchasing Entity in identifying and preventing any unauthorized use or disclosure of any Confidential Information.

14.2.2.2 Without limiting the generality of the foregoing, Contractor shall advise Purchasing Entity, applicable Participating Entity, and the Lead State immediately if Contractor learns or has reason to believe that any person who has had access to Confidential Information has violated or intends to violate the terms of this Master Agreement, and Contractor shall at its expense cooperate with Purchasing Entity in seeking injunctive or other equitable relief in the name of Purchasing Entity or Contractor against any such person.

14.2.2.3 Except as directed by Purchasing Entity, Contractor will not at any time during or after the term of this Master Agreement disclose, directly or indirectly, any Confidential Information to any person, except in accordance with this Master Agreement, and that upon termination of this Master Agreement or at Purchasing Entity's request, Contractor shall turn over to Purchasing Entity all documents, papers, and other matter in Contractor's possession that embody Confidential Information.

14.2.2.4 Notwithstanding the foregoing, Contractor may keep one copy of such Confidential Information necessary for quality assurance, audits, and evidence of the performance of this Master Agreement.

14.2.3 Injunctive Relief. Contractor acknowledges that Contractor's breach of Section 14.2 would cause irreparable injury to the Purchasing Entity that cannot be inadequately compensated in monetary damages.

Accordingly, Purchasing Entity may seek and obtain injunctive relief against the breach or threatened breach of the foregoing undertakings, in addition to any other legal remedies that may be available.

Contractor acknowledges and agrees that the covenants contained herein are necessary for the protection of the legitimate business interests of Purchasing Entity and are reasonable in scope and content.

14.2.4 Purchasing Entity Law. These provisions will be applicable only to extent they are not in conflict with the applicable public disclosure laws of any Purchasing Entity.

14.2.5 NASPO ValuePoint. The rights granted to Purchasing Entities and Contractor's obligations under this section will also extend to NASPO ValuePoint's Confidential Information, including but not limited to Participating Addenda, Orders or transaction data relating to Orders under this Master Agreement that identify the entity/customer, Order dates, line-item descriptions and volumes, and prices/rates. This provision does not apply to disclosure to the Lead State, a Participating State, or any governmental entity exercising an audit, inspection, or examination pursuant to this Master Agreement. To the extent permitted by law, Contractor shall notify the Lead State of the identity of any entity seeking access to the Confidential Information described in this subsection.

14.2.6 Public Information. This Master Agreement and all related documents are subject to disclosure pursuant to the Lead State's public information laws.

14.3 Assignment/Subcontracts

14.3.1 Contractor shall not assign, sell, transfer, subcontract or sublet rights, or delegate responsibilities under this Master Agreement, in whole or in part, without the prior written approval of the Lead State.

14.3.2 The Lead State reserves the right to assign any rights or duties, including written assignment of contract administration duties, to NASPO ValuePoint and other third parties.

14.4 Changes in Contractor Representation. The Contractor must, within ten (10) calendar days, notify the Lead State in writing of any changes in the Contractor's key administrative personnel managing the Master Agreement. The Lead State reserves the right to approve or reject changes in key personnel, as identified in the Contractor's proposal. The Contractor shall propose replacement key personnel having substantially equal or better education, training, and experience as was possessed by the key person proposed and evaluated in the Contractor's proposal.

14.5 Independent Contractor. Contractor is an independent contractor. Contractor has no authorization, express or implied, to bind the Lead State, Participating States, other Participating Entities, or Purchasing Entities to any agreements, settlements, liability or understanding whatsoever, and shall not to hold itself out as agent except as expressly set forth herein or as expressly set forth in an applicable Participating Addendum or Order.

- 14.6 Cancellation.** Unless otherwise set forth herein, this Master Agreement may be canceled by either party upon sixty (60) days' written notice prior to the effective date of the cancellation. Further, any Participating Entity may cancel its participation upon thirty (30) days' written notice, unless otherwise limited or stated in the Participating Addendum. Cancellation may be in whole or in part. Any cancellation under this provision will not affect the rights and obligations attending Orders outstanding at the time of cancellation, including any right of a Purchasing Entity to indemnification by the Contractor, rights of payment for Products delivered and accepted, rights attending any warranty or default in performance in association with any Order, and requirements for records administration and audit. Cancellation of the Master Agreement due to Contractor default may be immediate.
- 14.7 Force Majeure.** Neither party to this Master Agreement shall be held responsible for delay or default caused by fire, riot, unusually severe weather, other acts of God, or acts of war which are beyond that party's reasonable control. The Lead State may terminate this Master Agreement upon determining such delay or default will reasonably prevent successful performance of the Master Agreement.
- 14.8 Defaults and Remedies**
- 14.8.1** The occurrence of any of the following events will be an event of default under this Master Agreement:
- 14.8.1.1** Nonperformance of contractual requirements;
 - 14.8.1.2** A material breach of any term or condition of this Master Agreement;
 - 14.8.1.3** Any certification, representation or warranty by Contractor in response to the solicitation or in this Master Agreement that proves to be untrue or materially misleading;
 - 14.8.1.4** Institution of proceedings under any bankruptcy, insolvency, reorganization or similar law, by or against Contractor, or the appointment of a receiver or similar officer for Contractor or any of its property, which is not vacated or fully stayed within thirty (30) calendar days after the institution or occurrence thereof; or
 - 14.8.1.5** Any default specified in another section of this Master Agreement.
- 14.8.2** Upon the occurrence of an event of default, the Lead State shall issue a written notice of default, identifying the nature of the default, and providing a period of fifteen (15) calendar days in which Contractor shall have an opportunity to cure the default. The Lead State shall not be required to provide advance written notice or a cure period and may immediately terminate this Master Agreement in whole or in part if the Lead State, in its sole discretion, determines that it is reasonably necessary to preserve public safety or prevent immediate public crisis. Time allowed for cure will not diminish or eliminate Contractor's liability for damages, including liquidated damages to the extent provided for under this Master Agreement.

14.8.3 If Contractor is afforded an opportunity to cure and fails to cure the default within the period specified in the written notice of default, Contractor shall be in breach of its obligations under this Master Agreement and the Lead State shall have the right to exercise any or all of the following remedies:

14.8.3.1 Any remedy provided by law;

14.8.3.2 Termination of this Master Agreement and any related Contracts or portions thereof;

14.8.3.3 Assessment of liquidated damages as provided in this Master Agreement;

14.8.3.4 Suspension of Contractor from being able to respond to future bid solicitations;

14.8.3.5 Suspension of Contractor's performance; and

14.8.3.6 Withholding of payment until the default is remedied.

14.8.4 Unless otherwise specified in the Participating Addendum, in the event of a default under a Participating Addendum, a Participating Entity shall provide a written notice of default as described in this section and shall have all of the rights and remedies under this paragraph regarding its participation in the Master Agreement, in addition to those set forth in its Participating Addendum. Unless otherwise specified in an Order, a Purchasing Entity shall provide written notice of default as described in this section and have all of the rights and remedies under this paragraph and any applicable Participating Addendum with respect to an Order placed by the Purchasing Entity. Nothing in these Master Agreement Terms and Conditions will be construed to limit the rights and remedies available to a Purchasing Entity under the applicable commercial code.

14.9 Waiver of Breach. Failure of the Lead State, Participating Entity, or Purchasing Entity to declare a default or enforce any rights and remedies will not operate as a waiver under this Master Agreement, any Participating Addendum, or any Purchase Order. Any waiver by the Lead State, Participating Entity, or Purchasing Entity must be in writing. Waiver by the Lead State or Participating Entity of any default, right or remedy under this Master Agreement or Participating Addendum, or by Purchasing Entity with respect to any Purchase Order, or breach of any terms or requirements of this Master Agreement, a Participating Addendum, or Purchase Order will not be construed or operate as a waiver of any subsequent default or breach of such term or requirement, or of any other term or requirement under this Master Agreement, any Participating Addendum, or any Purchase Order.

14.10 Debarment. The Contractor certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in public procurement or contracting by any governmental department or agency. This certification represents a recurring certification made at the time any Order is placed under this Master Agreement. If the Contractor cannot certify this statement, attach a written explanation for review by the Lead State.

14.11 No Waiver of Sovereign Immunity

- 14.11.1** In no event will this Master Agreement, any Participating Addendum or any contract or any Purchase Order issued thereunder, or any act of the Lead State, a Participating Entity, or a Purchasing Entity be a waiver of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the Constitution of the United States or otherwise, from any claim or from the jurisdiction of any court.
- 14.11.2** This section applies to a claim brought against the Participating Entities who are states only to the extent Congress has appropriately abrogated the state's sovereign immunity and is not consent by the state to be sued in federal court. This section is also not a waiver by the state of any form of immunity, including but not limited to sovereign immunity and immunity based on the Eleventh Amendment to the Constitution of the United States.

14.12 Governing Law and Venue

- 14.12.1** The procurement, evaluation, and award of the Master Agreement will be governed by and construed in accordance with the laws of the Lead State sponsoring and administering the procurement. The construction and effect of the Master Agreement after award will be governed by the law of the state serving as Lead State. The construction and effect of any Participating Addendum or Order against the Master Agreement will be governed by and construed in accordance with the laws of the Participating Entity's or Purchasing Entity's state.
- 14.12.2** Unless otherwise specified in the RFP, the venue for any protest, claim, dispute or action relating to the procurement, evaluation, and award is in the state serving as Lead State. Venue for any claim, dispute or action concerning the terms of the Master Agreement will be in the state serving as Lead State. Venue for any claim, dispute, or action concerning any Order placed against the Master Agreement or the effect of a Participating Addendum will be in the Purchasing Entity's state.
- 14.12.3** If a claim is brought in a federal forum, then it must be brought and adjudicated solely and exclusively within the United States District Court for (in decreasing order of priority): the Lead State for claims relating to the procurement, evaluation, award, or contract performance or administration if the Lead State is a party; a Participating State if a named party; the state where the Participating Entity or Purchasing Entity is located if either is a named party.

- 14.13 Assignment of Antitrust Rights.** Contractor irrevocably assigns to a Participating Entity who is a state any claim for relief or cause of action which the Contractor now has or which may accrue to the Contractor in the future by reason of any violation of state or federal antitrust laws (15 U.S.C. § 1-15 or a Participating Entity's state antitrust provisions), as now in effect and as may be

amended from time to time, in connection with any goods or services provided in that state for the purpose of carrying out the Contractor's obligations under this Master Agreement or Participating Addendum, including, at the Participating Entity's option, the right to control any such litigation on such claim for relief or cause of action.

- 14.14 Survivability.** Unless otherwise explicitly set forth in a Participating Addendum or Order, the terms of this Master Agreement as they apply to the Contractor, Participating Entities, and Purchasing Entities, including but not limited to pricing and the reporting of sales and payment of administrative fees to NASPO ValuePoint, shall survive expiration of this Master Agreement and shall continue to apply to all Participating Addenda and Orders until the expiration thereof.

EXHIBIT B

SCOPE OF WORK

I. Master Agreement Objectives

The State of Oklahoma, (Office of Management & Enterprise Services (OMES), Central Purchasing (Lead State) is requesting proposals for Heavy Construction and Industrial Equipment in furtherance of the NASPO ValuePoint Cooperative Purchasing Program.

The objective of this RFP is to obtain best value, competitive proposal requirements, and to receive collective volume purchasing by all government entities through the NASPO ValuePoint Cooperative Purchasing Program, which creates more favorable pricing than is obtainable by an individual state or local government entities.

II. Master Agreement Deliverables

1. Product Categories

A. Heavy Construction Equipment

The award of this RFP will cover categories which contain heavy construction equipment, such as Articulated Dump Haulers, Articulated Haulers, Backhoes, Cold Planers, Compactors- Road and Asphalt, Dozers, Motor Graders, Pavers, Reclaimers, Site Dumpers, Skid Steers, Telehandlers, Track Excavators, Tracked Loaders, Wheel Loaders, Wheeled Excavator and Sweeper Equipment - Mechanical, Airport/Runway, Walk Behind, Riding, Parking Lot, Sidewalk Sweeping Equipment Asphalt Distributor, Chip Spreader, Crack Router/Sealant, Ditcher, Emulsion Tank, Patch Truck, Patchers, Road Widener, Scraper, Screed, Sprayer / Water Truck / Water Tank, and Stabilizer.

B: Industrial Equipment

To compliment this offering, industrial equipment will contain equipment such as Air Compressors, Back Up Battery Packs, Generators, Forklifts, Light Towers, Portable Generators, and pull-behind portable solar charging stations.

C. Value Added Option for Additional Equipment

Attachment L allows Offerors to offer their most frequently purchased items or special contract listings for this award as a value add. These items will hold cost for the first initial period of the contract. This attachment will be included in the evaluation. In addition, Offerors may offer as a value add to this award, other equipment and / or categories which fall under the general guidelines of these equipment types.

Subject to Participating Entity approval, these value-add options may or may not be ultimately exercised at the participating addendum level. This may be an emerging technology in equipment or general enhancements such as, Brooms, Conveyers (Drum, Single, Double, Combi, Stati), Melter, Mills, Mixers, Oil Distributor, Rollers, Remote Control, Automation, Safety Features, and Alternative Fuel Options. Special financing and or leasing options should also be listed here.

III. Contractor Responsibilities and Tasks

1. Authorized Dealers / Distributors

Only manufacturer Offerors with strong dealer networks in multiple states are asked to respond directly to this RFP and will be named on the award of the Master Agreement. The awardees of the resulting Master Agreements will be responsible for all reporting, management fees required, and the individual Participating Addendums executed.

The manufacturer will offer users of this contract set discount levels, which may be sold and serviced at the dealer level. Any interested equipment dealer is highly encouraged to connect with their manufacturer and ensure they have been named as an authorized dealer / distributor. Attachment M, Distributors by State, does list authorized dealer / distributors and will be part of the evaluation process to ensure adequate local supply is addressed as well as shipping and delivery options.

2. Insurance

Offerors shall, during the term of this Master Agreement, maintain in full force and effect, the insurance described in this section. Contractor shall acquire such insurance from an insurance carrier or carriers licensed to conduct business in each Participating Entity's state and having a rating of A-, Class VII or better, in the most recently published edition of A.M. Best's Insurance Reports. Failure to buy and maintain the required insurance may result in this Master Agreement's termination or, at a Participating Entity's option, result in termination of its Participating Addendum.

A. Coverage shall be written on an occurrence basis. The minimum acceptable limits shall be as indicated below:

- (1) Commercial General Liability covering premises operations, independent contractors, products and completed operations, blanket contractual liability, personal injury (including death), advertising liability, and property damage, with a limit of not less than \$5 million per occurrence.
- (2) Contractor must comply with any applicable State Workers Compensation or Employers Liability Insurance requirements.

B. Offeror / Contractor shall pay premiums on all insurance policies. Contractor shall provide notice to a Participating Entity who is a state within five (5) business days after Contractor is first aware of expiration, cancellation or nonrenewal of such policy or is first aware that cancellation is threatened or expiration, nonrenewal or expiration otherwise may occur.

C. Copies of renewal certificates of all required insurance shall be furnished within thirty (30) days after any renewal date to the applicable state Participating Entity. Failure to provide evidence of coverage may, at the sole option of the Lead State, or any Participating Entity, result in this Master Agreement's termination or the termination of any Participating Addendum.

D. Coverage and limits shall not limit Contractor's liability and obligations under this Master Agreement, any Participating Addendum, or any Purchase Order.

3. Licensing

A. Sales of motor vehicles are subject to state Motor Vehicle Statutes. Offeror certifies by submission of a response that all required Motor Vehicle Commission licenses are in place and current, and that copies of all such licenses, if requested, will be submitted with the states' participating addendums.

B. License requirements for states participating in the contract will be addressed in each state's participating addendum.

C. It is the Contractor's responsibility to keep all required Motor Vehicle licensing current during the term of the contract and to furnish copies at any time upon request by the contract administrator. If the Contractor does not maintain current licensing, Central Purchasing may immediately terminate the contract upon discovery of the expiration of the license. Contracts for motor vehicles to be sold may be made only with properly licensed Motor Vehicle Dealers.

4. Ordering

A. No minimum orders will be considered under this Contract. Please see the pricing attachment for value-added incentive volume discount request.

B. Options/Accessories/Attachments on ordered equipment shall include all standard items normally furnished by the Contractor's manufacturer/dealer for the basic equipment being purchased.

Contractor shall identify any websites that can be of assistance in determining needs and calculating total cost of items purchased.

C. Any trade-in allowances determined by the Contractor shall be deducted from the established current price before the discount is applied. The formula will be to deduct the discount from the established current price and then take off the trade-in allowance. (Only for those Purchasing Entities allowed to trade-in equipment for new equipment).

5. Changes in Contractor Contact

The Contractor shall notify the Contracting Officer of any changes in the company status, such as mergers, sell offs, discontinuation of equipment, addition of equipment lines and changes in the contact information of the Contract. The Contracting Officer shall be able to contact the Contractor at all times during business hours.

6. Contract Provisions for Orders Utilizing Federal Funds.

Pursuant to Appendix II to 2 Code of Federal Regulations (CFR) Part 200, Contract Provisions for Non-Federal Entity Contracts Under Federal Awards, Orders funded with federal funds may have additional contractual

requirements or certifications that must be satisfied at the time the Order is placed or upon delivery. These federal requirements may be proposed by Participating Entities in Participating Addenda and Purchasing Entities for incorporation in Orders placed under this Master Agreement.

7. Warranty-Equipment/Options/Accessories/Attachments

A. The Contractor agrees the products furnished under this Contract shall be covered by all commercial warranties the Contractor provides for such products, and rights and remedies provided herein are in addition to and do not limit any rights afforded by any other clause of this Contract.

B. The Contractor warrants that at the time of delivery, all equipment purchased under this Contract will be free from defects in material or workmanship and will conform to the specifications and all other requirements of this Contract.

C. All warranty work performed, and parts/materials supplied shall meet original equipment manufacturer (OEM) warranty requirements. Equivalent substitutions must be approved by the Purchasing Entity contact person prior to installation.

D. Warranty work performed not meeting specifications or found to be defective, shall not be accepted. The Contractor shall be required to make repairs or corrections at no additional cost to the Purchasing Entity.

E. Offeror shall furnish a copy of their warranty applicable for the equipment. All equipment warranties shall start on the date of delivery and shall be for the full term of said warranty.

F. Before actual warranty work begins, ownership of the equipment shall be established to ensure the equipment in need of repair belongs to the Purchasing Entity requesting the service. The following information shall be provided in order to determine ownership of the equipment:

(1) Name of Purchasing Entity and division, if applicable. Make, Model, and VIN of equipment Control number of Purchasing Entity (Inventory number)

G. Repairs made that are covered by a warranty shall not be paid for by the Purchasing Entity.

H. The Contractor shall furnish all necessary supervision, labor, equipment, tools, parts, materials, and supplies needed for the warranty repair work.

I. All persons utilized in the performance of this contract shall be authorized by the Contractor and be fully qualified to perform the warranty work required. Warranty work shall be performed by certified or trained or authorized service technicians.

J. Equipment that will remain in the Contractor's possession overnight and for extended periods shall be stored in a safe and secure location for protection from theft and environmental dangers. The Contractor shall be responsible for the proper care and custody of any state-owned equipment in the Contractor's possession.

8. Quality of Parts

A. Parts under these specifications should be name brand, nationally advertised merchandise. Equivalent substitutions must be approved by the Purchasing Entity contact person.

B. After Market Repair parts must be equal to or exceed Contractor's original equipment manufacturer's specifications. Repair parts must be packaged and distributed under their respective nationally known name brands.

C. All rebuilt or remanufactured parts must meet the same requirements as listed above.

D. Some repair parts may be required to be original equipment manufactured repair parts. Contractor's dealers' network must carry a complete line of OEM parts for all models of equipment they carry.

E. Preservation, packaging, and packing and marking will be in accordance with best commercial practice to provide adequate protection against shipping damage.

9. Warranty/Buy Back

Contractor is required to provide any buy-back, trade-in, or exchange policy concerning repair parts sold to Purchasing Entities. Contractor shall correct ordering errors without further cost to the ordering entity. A copy of the Warranty shall be included for replacement parts purchased.

10. Repair Facilities

Repair facilities that will perform the warranty work of items under this Contract shall be identified as listed on the Contractor's dealer network. As the manufacturer, the Contractor is responsible for ensuring that the facilities adhere to the contract requirements for warranty work performance.

11. Freight/Shipping/Set-up Fees

A. Freight from the factory to the distributor is the responsibility of the Contractor. Freight from the distributor to the customer is an allowable charge.

B. Delivery is to be FOB Destination (of ordering entity) freight collect

C. Any Freight, shipping and handling costs and set-up fees paid by the ordering entity are to be annotated on the quote/invoice as a separate line item.

12. Delivery

A. Delivery of equipment shall be stated in each quotation. It is preferable to expect delivery within 120 calendar days after receipt of order unless other arrangements are made between the ordering party and the Contractor due to current market status. Earlier deliveries are encouraged however there shall be no change in contract price or discount terms because of the earlier delivery.

B. All equipment shall be delivered new, unused, assembled, serviced, oiled and ready for immediate use, unless otherwise requested by the Purchasing Entity. Liability for product delivery remains with the Contractor until delivered and accepted.

C. Delivery shall be made in accordance with instructions on the purchase order from each Purchasing Entity. If there is a discrepancy between the purchase order and what is listed on the

contract, the Contractor shall seek clarification from the ordering party and/or the Contracting Officer.

D. Delivery on parts is to be made within 30 days or otherwise stated in quotation.

E. One operating manual, an illustrated parts manual or List, and the warranty shall be furnished for each new item purchased, as well as any proprietary tools necessary to perform routine service or adjustments, all at no additional cost.

F. All ordering entities will have the option to pick up their equipment from the dealer.

13. Price Adjustments

The Contract price shall be the most current Contractor's Manufacturer's Suggested Retail Price (MSRP) in effect at the time the order is placed less the discount percentage offered. This allows for market fluctuations to take place while the discount percentage must remain stable.

The Contractor will be required to notify the Contracting Officer (Lead State) for review and approval when new pricing updates occur and an explanation of what has prompted the change as well as documentation to support the price increase. Documentation may include: the manufacturers national price increase announcement letter, a complete and detailed description of what products are increasing and by what percentage, a complete and detailed description of what raw materials and/or other costs have increased and provide proof of increase, index data and other information to support and justify the increase.

The price increase must not produce a higher profit margin than the original contract, and must be accompanied by sufficient documentation and nationwide notice of price adjustment to the published commercial price list.

Price Established at Time of Order. Pricing is established at the time an order is placed by a public entity with the Contractor. No retroactive price increases will be allowed, nor

will price increases be allowed at time of delivery.

Price Reductions. In the event of a price decrease in any category of product at any time during the contract in an OEM's published commercial price list, including renewal options, the Lead State shall be notified immediately. All published commercial price list price reductions shall be effective upon the notification provided to the Lead State.

14. New Products

New Products may be added to the awarded categories as they are introduced as long as the products remain within the scope of that category. The quoted discount cannot be lowered throughout the Contract period.

15. Discontinued Products

Contractor is to notify the Contracting Officer of any changes in their schedule of equipment such as discontinued products or replacement models to continue proper presentation on contract award posting.

16. Price

The purpose of this competitive solicitation is to develop a category / catalog discount contract structure to provide for equipment to be made available for purchase. This allows for the most current model of equipment to be covered under this contract as equipment is introduced to stay with available market trends.

The pricing matrix is a percentage discount subtracted from the Contractor's Suggested Retail Price. Contractor can submit actual pricing schedules for their equipment with the percentage discount already figured, as long as the Contractor list price is stated first, then the discount, then the final discount price. If you have products that can be fueled by means other than gas or diesel fuel, and that are considered environmentally friendly, please include them in your response.

The quoted discount percentage will be in affect the entire contract period. Additional or deeper discounts will be accepted, but original discount rates cannot be lowered.

17. Value Added Contract Items

Value Added Items have been included with Attachment I, Cost Proposal, within 2 tables titled:

- I.2 Heavy Equipment Value Add
- I.4 Industrial Equipment Value Add

As a value-added option, vendor may specify contract items which will qualify as priority, bestselling, higher usage items, or a special "hot" list or "contract offering" based on a deeper discount.

Due to the large variance of equipment available, and as the subject expert, the vendor may choose the items to offer.

This product listing will allow the vendor to represent the type, style, quality, and breadth

of equipment options available if awarded.

This list will remain firm for the initial base year, with the option to refresh or revise the listing of contract special items on an annual basis at contract renewal periods.

Submission of items will be included in the total value-added scoring evaluation.



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**Attachment B
SCOPE OF WORK**

This Scope of Work describes the Deliverables being sought through this RFP and the scope of what Contractor will be expected to offer through a Master Agreement resulting from this RFP. The Scope of Work is intended to provide interested Offerors with sufficient basic information to submit a proposal. It is not intended to limit a proposal's content or exclude any relevant or essential data.

I. Master Agreement Objectives

The State of Oklahoma, (Office of Management & Enterprise Services (OMES), Central Purchasing (Lead State) is requesting proposals for Heavy Construction and Industrial Equipment in furtherance of the NASPO ValuePoint Cooperative Purchasing Program.

The objective of this RFP is to obtain best value, competitive proposal requirements, and to receive collective volume purchasing by all government entities through the NASPO ValuePoint Cooperative Purchasing Program, which creates more favorable pricing than is obtainable by an individual state or local government entities.

II. Master Agreement Deliverables

1. Product Categories

A. Heavy Construction Equipment

The award of this RFP will cover categories which contain heavy construction equipment, such as Articulated Dump Haulers, Articulated Haulers, Backhoes, Cold Planers, Compactors- Road and Asphalt, Dozers, Motor Graders, Pavers, Reclaimers, Site Dumpers, Skid Steers, Telehandlers, Track Excavators, Tracked Loaders, Wheel Loaders, Wheeled Excavator and Sweeper Equipment - Mechanical, Airport/Runway, Walk Behind, Riding, Parking Lot, Sidewalk Sweeping Equipment Asphalt Distributor, Chip Spreader, Crack Router/Sealant, Ditcher, Emulsion Tank, Patch Truck, Patchers, Road Widener, Scraper, Screed, Sprayer / Water Truck / Water Tank, and Stabilizer.

B: Industrial Equipment

To compliment this offering, industrial equipment will contain equipment such as Air Compressors, Back Up Battery Packs, Generators, Forklifts, Light Towers, Portable Generators, and pull-behind portable solar charging stations.

C. Value Added Option for Additional Equipment

Attachment L allows Offerors to offer their most frequently purchased items or special contract listings for this award as a value add. These items will hold cost for the first initial period of the contract. This attachment will be included in the evaluation. In addition, Offerors may offer as a value add to this award, other equipment and / or categories which fall under the general guidelines of these equipment types. Subject to Participating Entity approval, these value-add options may or may not be ultimately exercised at the participating addendum level. This may be an emerging technology in equipment or general enhancements such as, Brooms, Conveyers (Drum, Single, Double, Combi, Stati), Melter, Mills, Mixers,



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Oil Distributor, Rollers, Remote Control, Automation, Safety Features, and Alternative Fuel Options. Special financing and or leasing options should also be listed here.

III. Contractor Responsibilities and Tasks

1. Authorized Dealers / Distributors

Only manufacturer Offerors with strong dealer networks in multiple states are asked to respond directly to this RFP and will be named on the award of the Master Agreement. The awardees of the resulting Master Agreements will be responsible for all reporting, management fees required, and the individual Participating Addendums executed.

The manufacturer will offer users of this contract set discount levels, which may be sold and serviced at the dealer level. Any interested equipment dealer is highly encouraged to connect with their manufacturer and ensure they have been named as an authorized dealer / distributor. Attachment M, Distributors by State, does list authorized dealer / distributors and will be part of the evaluation process to ensure adequate local supply is addressed as well as shipping and delivery options.

2. Insurance

Offerors shall, during the term of this Master Agreement, maintain in full force and effect, the insurance described in this section. Contractor shall acquire such insurance from an insurance carrier or carriers licensed to conduct business in each Participating Entity's state and having a rating of A-, Class VII or better, in the most recently published edition of A.M. Best's Insurance Reports. Failure to buy and maintain the required insurance may result in this Master Agreement's termination or, at a Participating Entity's option, result in termination of its Participating Addendum.

A. Coverage shall be written on an occurrence basis. The minimum acceptable limits shall be as indicated below:

- (1) Commercial General Liability covering premises operations, independent contractors, products and completed operations, blanket contractual liability, personal injury (including death), advertising liability, and property damage, with a limit of not less than \$5 million per occurrence.
- (2) Contractor must comply with any applicable State Workers Compensation or Employers Liability Insurance requirements.

B. Offeror / Contractor shall pay premiums on all insurance policies. Contractor shall provide notice to a Participating Entity who is a state within five (5) business days after Contractor is first aware of expiration, cancellation or nonrenewal of such policy or is first aware that cancellation is threatened or expiration, nonrenewal or expiration otherwise may occur.

C. Copies of renewal certificates of all required insurance shall be furnished within thirty (30) days after any renewal date to the applicable state Participating Entity. Failure to provide evidence of coverage may, at the sole option of the Lead State, or any Participating Entity, result in this Master Agreement's termination or the termination of any Participating Addendum.

D. Coverage and limits shall not limit Contractor's liability and obligations under this



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Master Agreement, any Participating Addendum, or any Purchase Order.

3. Licensing

A. Sales of motor vehicles are subject to state Motor Vehicle Statutes. Offeror certifies by submission of a response that all required Motor Vehicle Commission licenses are in place and current, and that copies of all such licenses, if requested, will be submitted with the states' participating addendums.

B. License requirements for states participating in the contract will be addressed in each state's participating addendum.

C. It is the Contractor's responsibility to keep all required Motor Vehicle licensing current during the term of the contract and to furnish copies at any time upon request by the contract administrator. If the Contractor does not maintain current licensing, Central Purchasing may immediately terminate the contract upon discovery of the expiration of the license. Contracts for motor vehicles to be sold may be made only with properly licensed Motor Vehicle Dealers.

4. Ordering

A. No minimum orders will be considered under this Contract. Please see the pricing attachment for value-added incentive volume discount request.

B. Options/Accessories/Attachments on ordered equipment shall include all standard items normally furnished by the Contractor's manufacturer/dealer for the basic equipment being purchased. Contractor shall identify any websites that can be of assistance in determining needs and calculating total cost of items purchased.

C. Any trade-in allowances determined by the Contractor shall be deducted from the established current price before the discount is applied. The formula will be to deduct the discount from the established current price and then take off the trade-in allowance. (Only for those Purchasing Entities allowed to trade-in equipment for new equipment).

5. Changes in Contractor Contact

The Contractor shall notify the Contracting Officer of any changes in the company status, such as mergers, sell offs, discontinuation of equipment, addition of equipment lines and changes in the contact information of the Contract. The Contracting Officer shall be able to contact the Contractor at all times during business hours.

6. Contract Provisions for Orders Utilizing Federal Funds.

Pursuant to Appendix II to 2 Code of Federal Regulations (CFR) Part 200, Contract Provisions for Non-Federal Entity Contracts Under Federal Awards, Orders funded with federal funds may have additional contractual requirements or certifications that must be satisfied at the time the Order is placed or upon delivery. These federal requirements may be proposed by Participating Entities in Participating Addenda and Purchasing Entities for incorporation in Orders placed under this Master Agreement.



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7. Warranty-Equipment/Options/Accessories/Attachments

A. The Contractor agrees the products furnished under this Contract shall be covered by all commercial warranties the Contractor provides for such products, and rights and remedies provided herein are in addition to and do not limit any rights afforded by any other clause of this Contract.

B. The Contractor warrants that at the time of delivery, all equipment purchased under this Contract will be free from defects in material or workmanship and will conform to the specifications and all other requirements of this Contract.

C. All warranty work performed, and parts/materials supplied shall meet original equipment manufacturer (OEM) warranty requirements. Equivalent substitutions must be approved by the Purchasing Entity contact person prior to installation.

D. Warranty work performed not meeting specifications or found to be defective, shall not be accepted. The Contractor shall be required to make repairs or corrections at no additional cost to the Purchasing Entity.

E. Offeror shall furnish a copy of their warranty applicable for the equipment.
All equipment warranties shall start on the date of delivery and shall be for the full term of said warranty.

F. Before actual warranty work begins, ownership of the equipment shall be established to ensure the equipment in need of repair belongs to the Purchasing Entity requesting the service. The following information shall be provided in order to determine ownership of the equipment:

(1) Name of Purchasing Entity and division, if applicable. Make, Model, and VIN of equipment Control number of Purchasing Entity (Inventory number)

G. Repairs made that are covered by a warranty shall not be paid for by the Purchasing Entity.

H. The Contractor shall furnish all necessary supervision, labor, equipment, tools, parts, materials, and supplies needed for the warranty repair work.

I. All persons utilized in the performance of this contract shall be authorized by the Contractor and be fully qualified to perform the warranty work required. Warranty work shall be performed by certified or trained or authorized service technicians.

J. Equipment that will remain in the Contractor's possession overnight and for extended periods shall be stored in a safe and secure location for protection from theft and environmental dangers. The Contractor shall be responsible for the proper care and custody of any state-owned equipment in the Contractor's possession.

8. Quality of Parts



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- A.** Parts under these specifications should be name brand, nationally advertised merchandise. Equivalent substitutions must be approved by the Purchasing Entity contact person.
- B.** After Market Repair parts must be equal to or exceed Contractor's original equipment manufacturer's specifications. Repair parts must be packaged and distributed under their respective nationally known name brands.
- C.** All rebuilt or remanufactured parts must meet the same requirements as listed above.
- D.** Some repair parts may be required to be original equipment manufactured repair parts. Contractor's dealers' network must carry a complete line of OEM parts for all models of equipment they carry.
- E.** Preservation, packaging, and packing and marking will be in accordance with best commercial practice to provide adequate protection against shipping damage.

9. Warranty/Buy Back

Contractor is required to provide any buy-back, trade-in, or exchange policy concerning repair parts sold to Purchasing Entities. Contractor shall correct ordering errors without further cost to the ordering entity. A copy of the Warranty shall be included for replacement parts purchased.

10. Repair Facilities

Repair facilities that will perform the warranty work of items under this Contract shall be identified as listed on the Contractor's dealer network. As the manufacturer, the Contractor is responsible for ensuring that the facilities adhere to the contract requirements for warranty work performance.

11. Freight/Shipping/Set-up Fees

- A.** Freight from the factory to the distributor is the responsibility of the Contractor. Freight from the distributor to the customer is an allowable charge.
- B.** Delivery is to be FOB Destination (of ordering entity) freight collect
- C.** Any Freight, shipping and handling costs and set-up fees paid by the ordering entity are to be annotated on the quote/invoice as a separate line item.

12. Delivery

- A.** Delivery of equipment shall be stated in each quotation. It is preferable to expect delivery within 120 calendar days after receipt of order unless other arrangements are made between the ordering party and the Contractor due to current market status. Earlier deliveries are encouraged however there shall be no change in contract price or discount terms because of the earlier delivery.
- B.** All equipment shall be delivered new, unused, assembled, serviced, oiled and ready for immediate use, unless otherwise requested by the Purchasing Entity. Liability for product delivery remains with the Contractor until delivered and accepted.
- C.** Delivery shall be made in accordance with instructions on the purchase order from each Purchasing Entity. If there is a discrepancy between the purchase order and what is listed on the



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contract, the Contractor shall seek clarification from the ordering party and/or the Contracting Officer.

D. Delivery on parts is to be made within 30 days or otherwise stated in quotation.

E. One operating manual, an illustrated parts manual or List, and the warranty shall be furnished for each new item purchased, as well as any proprietary tools necessary to perform routine service or adjustments, all at no additional cost.

F. All ordering entities will have the option to pick up their equipment from the dealer.

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The Contractor will be required to notify the Contracting Officer (Lead State) for review and approval when new pricing updates occur and an explanation of what has prompted the change as well as documentation to support the price increase. Documentation may include: the manufacturers national price increase announcement letter, a complete and detailed description of what products are increasing and by what percentage, a complete and detailed description of what raw materials and/or other costs have increased and provide proof of increase, index data and other information to support and justify the increase.

The price increase must not produce a higher profit margin than the original contract, and must be accompanied by sufficient documentation and nationwide notice of price adjustment to the published commercial price list.

Price Established at Time of Order. Pricing is established at the time an order is placed by a public entity with the Contractor. No retroactive price increases will be allowed, nor will price increases be allowed at time of delivery.

Price Reductions. In the event of a price decrease in any category of product at any time during the contract in an OEM's published commercial price list, including renewal options, the Lead State shall be notified immediately. All published commercial price list price reductions shall be effective upon the notification provided to the Lead State.

14. New Products

New Products may be added to the awarded categories as they are introduced as long as the products remain within the scope of that category. The quoted discount cannot be lowered throughout the Contract period.

15. Discontinued Products

Contractor is to notify the Contracting Officer of any changes in their schedule of equipment such as discontinued products or replacement models to continue proper presentation on contract award posting.

16. Price



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The pricing matrix is a percentage discount subtracted from the Contractor's Suggested Retail Price. Contractor can submit actual pricing schedules for their equipment with the percentage discount already figured, as long as the Contractor list price is stated first, then the discount, then the final discount price. If you have products that can be fueled by means other than gas or diesel fuel, and that are considered environmentally friendly, please include them in your response.

The quoted discount percentage will be in affect the entire contract period. Additional or deeper discounts will be accepted, but original discount rates cannot be lowered.

17. Value Added Contract Items

Value Added Items have been included with Attachment I, Cost Proposal, within 2 tables titled:

- I.2 Heavy Equipment Value Add
- I.4 Industrial Equipment Value Add

As a value-added option, vendor may specify contract items which will qualify as priority, bestselling, higher usage items, or a special "hot" list or "contract offering" based on a deeper discount.

Due to the large variance of equipment available, and as the subject expert, the vendor may choose the items to offer.

This product listing will allow the vendor to represent the type, style, quality, and breadth of equipment options available if awarded.

This list will remain firm for the initial base year, with the option to refresh or revise the listing of contract special items on an annual basis at contract renewal periods.

Submission of items will be included in the total value-added scoring evaluation.

Lead State Responsibilities and Tasks

Participating State Terms and Conditions. (ADMIN)

As a courtesy to Offerors, some Participating States' specific Terms and Conditions are provided as Attachments (see Attachment E) to this solicitation. These are for informational purposes only and will be negotiated with other Participating States after award of the Master Agreement. Each State reserves the right to negotiate additional terms and conditions in its Participating Addendums. Offerors shall submit a statement that they understand they may be required to negotiate these additional terms and conditions when executing a Participating Addendum.



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Attachment J PROPOSED MODIFICATIONS TO SAMPLE MASTER AGREEMENT

The Lead State may, but is not obligated to, consider proposed modifications to Attachment D, Sample Master Agreement.

Provisions of the Sample Master Agreement that are generally inapplicable to, incompatible with, or unsuitable for the subject of this RFP should be brought to the attention of the Lead State using the process described in this RFP for asking questions and will be addressed only at the sole discretion of the Lead State.

Offeror-specific modifications to the Sample Master Agreement may be proposed as part of Offeror's proposal in this attachment but are **strongly discouraged**. The quantity, breadth, and nature of modifications proposed by Offeror may be considered in the Lead State's evaluation of Offeror's proposal and of its risks, costs, and benefits to the Lead State and potential Participating Entities and Purchasing Entities. Proposing excessive or overly restrictive modifications, or proposing modifications upon which Offeror's proposal is conditioned, may result in Offeror's proposal being deemed non-responsive.

Offeror's Proposed Modifications. (Check one of the below.)

- ☐ Offeror has no proposed modifications to Attachment D, Sample Master Agreement.
- ☒ Offeror proposes the modifications set forth in the table below and **will submit with Offeror's proposal a redlined copy of Attachment D, Sample Master Agreement** incorporating each proposed modification. Offeror understands, acknowledges, and agrees to comply with the following:
- The following will not be considered by the Lead State:
 - Any proposed modification not submitted in this attachment;
 - Any proposed modification not accompanied by an explanation as required in this attachment;
 - Any proposed modification not reflected in redlined edits to the Sample Master Agreement and submitted with Offeror's proposal; and
 - Any proposed modification merely referencing another document or a URL.
 - Offerors may propose additional terms but must include them in this attachment and must clearly identify where any terms conflict with the Sample Master Agreement.
 - If Offeror is awarded a Master Agreement resulting from this RFP, a comparison of Attachment G, Sample Master Agreement and Offeror's accepted modifications thereto may be posted on the NASPO ValuePoint website for examination by potential Participating Entities and Purchasing Entities.
 - Each of the following fields **must** be completed for each proposed modification to the Sample Master Agreement:
 - **Sample Master Agreement Section Reference:** The page, section, or paragraph in the Sample Master Agreement that is the subject of Offeror's proposed modification.
 - **Sample Master Agreement Language:** The language in the Sample Master Agreement that the Offeror is proposing to modify.



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- **Proposed Changes and Alternate Language:** The Offeror's proposed changes to the Sample Master Agreement language including, if applicable, Offeror's proposed alternate language.
- **Justification for Proposed Change:** Offeror's justification for the proposed change.
- **Risk and Benefits of Acceptance:** Offeror's analysis of the risk and benefits to the Lead State, Participating Entities, or Purchasing Entities—including quantifiable costs or cost savings—if Offeror's proposed change is accepted by the Lead State.

Sample Master Agreement Section Reference	Sample Master Agreement Language	Proposed Changes and Alternate Language	Justification for Proposed Change	Risk and Benefits of Acceptance
Attachment A: RFP Terms & Conditions IV.D.4	4. Offeror's proposed costs must be inclusive of all fees and charges, including but not limited to fees or charges for shipping, delivery, credit card payments, or personnel. All costs proposed by Offeror must also be inclusive of the NASPO ValuePoint administrative fee.	Our proposed costs only include the current base list price, FOB Origin. Freight, PDI, P-Card surcharges, and dealer added items will be a separate line item on the P.O.	This is to ensure that we are offering the best possible discount to each customer no matter where they are located. The weight of our products on contract, total acquisition cost, along with special permitting by state our proposed change is most beneficial to the customer. This is accepted practice on most contracts with this type of equipment.	The risk of not accepting our proposed changed would result in a significant discount change as we would have to account for the largest freight cost on all bids to cover our risk. The benefit of accepting this is when freight costs go down due to easing of inflation, will be passed along to the customer.
Attachment B: Scope of Work II.1.C.	These items will hold cost for the first initial period of the contract	Our exception is that our GradeControl Technology value added items in Attachment L are not available as a separate purchase. These items are only available as options when configuring the wholegood machine. The pricing on these would fall under list price discount off of current price.	This is the industry standard practice for pricing these types of options on equipment.	Risk is minimal with the benefits to the customer as an option at machine list price discount.
Attachment B: Scope of Work III.4.C.	Any trade-in allowances determined by the Contractor shall be deducted from the established current price before the discount is applied. The formula will be to deduct the discount	Machines will be fully configured; the discount will then be applied to the fully configured machine. The trade value will then be deducted for the net amount owed by the customer.	This is the industry standard practice for trades within this industry.	Risk is low as the customer is still receiving the discount off of the fully configured machine before figuring in the trade value.



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	from the established current price and then take off the trade-in allowance. (Only for those Purchasing Entities allowed to trade-in equipment for new equipment).	Admin fees will be paid on the full machine contract price, not the net after trade.		
Attachment B: Scope of Work III.7.H.	The Contractor shall furnish all necessary supervision, labor, equipment, tools, parts, materials, and supplies needed for the warranty repair work.	Warranty repair work is performed by our independent authorized dealer network. They are fully trained and certified and have all the necessary supervision, labor, equipment, tools, parts, materials, and supplies needed for the warranty repair work.	Dealers will be authorized to sell our products and they will be authorized to service our products.	The benefit is that the dealer networks are closer to the customer location for faster response.
Attachment B: Scope of Work III.7.J.	Equipment that will remain in the Contractor's possession overnight and for extended periods shall be stored in a safe and secure location for protection from theft and environmental dangers. The Contractor shall be responsible for the proper care and custody of any state-owned equipment in the Contractor's possession	Contractors in this sentence will be our independent authorized dealer network, but we will agree to all other provisions. This will be part of our dealer training and certification process for selling on this contract.	Dealers will be authorized to sell our products and they will be authorized to service our products.	Low risk as dealers will be performing all of the service at their locations.
Attachment B: Scope of Work III.8.B.	After Market Repair parts must be equal to or exceed Contractor's original equipment manufacturer's specifications. Repair parts must be packaged and distributed under their respective nationally known name brands.	Any warranty work conducted will use authorized John Deere parts from our parts network (per our warranty statement). Any work outside of warranty using aftermarket parts would only be considered if requested by the customer but would be discouraged.	John Deere has an industry leading warranty policy that covers this topic.	Low risk, more beneficial for the customer because they are working with the local dealer.
Attachment B: Scope of Work III.8.D.	Some repair parts may be required to be original equipment manufactured repair parts. Contractor's	Our dealers are required to carry minimum stocking levels of service parts for all products that we	John Deere has an industry leading parts stocking policy.	Low risk, more beneficial for the customer because they are working with the local dealer.



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	dealers' network must carry a complete line of OEM parts for all models of equipment they carry.	are proposing on this contract. Parts outside of those minimum stocking levels are available in our regional parts depots across North America.		
Attachment B: Scope of Work III.9.	Contractor is required to provide any buy-back, trade-in, or exchange policy concerning repair parts sold to Purchasing Entities. Contractor shall correct ordering errors without further cost to the ordering entity. A copy of the Warranty shall be included for replacement parts purchased.	Warranty is handled by our independent authorized dealers.	John Deere has an industry leading warranty policy that covers this topic.	Low risk, more beneficial for the customer because they are working with the local dealer.
Attachment B: Scope of Work III.11.	A. Freight from the factory to the distributor is the responsibility of the Contractor. Freight from the distributor to the customer is an allowable charge. B. Delivery is to be FOB Destination (of ordering entity) freight collect C. Any Freight, shipping and handling costs and set-up fees paid by the ordering entity are to be annotated on the quote/invoice as a separate line item .	Our price pages are current base list price, FOB Destination, with freight as a separate line item. All freight is to be paid by the customer and will be annotated on the quote as a separate line item. This ensures we are providing the best discount possible to the customer.	Freight and shipping charges and PDI are varying based on the customer location. This allows for a better discount to all customers eliminating freight as a variable.	Benefits of this is that customers in closer proximity to the shipping factory aren't paying the same freight costs as customers that are farther away. The risk is that if freight is included within our pricing all customers would be offered a lowered discount to offset any freight cost risk.
Attachment B: Scope of Work III.12.A.	It is preferable to expect delivery within 120 calendar days after receipt of order unless other arrangements are made between the ordering party and the Contractor due to current market status.	We will do everything we can to provide the fastest delivery possible after receipt of PO. Current lead times due to demand and supply constraints may take longer than 120 calendar days to deliver. Customer will be notified of expected lead time prior to acceptance of purchase order.	With current demand and supply chain constraints we want to make the customers aware of extended lead times.	Open communication.



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Attachment B: Scope of Work III.12.B.	All equipment shall be delivered new, unused, assembled, serviced, oiled and ready for immediate use, unless otherwise requested by the Purchasing Entity. Liability for product delivery remains with the Contractor until delivered and accepted.	Delivery will be made by our independent local dealer. Arrangements for acceptance will be made by our independent local dealer.	This is clarification that dealers will be an authorized selling agent.	Customers can work directly with their local dealer.
Attachment B: Scope of Work III.12.E.	One operating manual, an illustrated parts manual or List, and the warranty shall be furnished for each new item purchased, as well as any proprietary tools necessary to perform routine service or adjustments, all at no additional cost.	Each machine is delivered with an operator's manual. Our warranty statement is available as part of this contract submission and is available to all customers. Parts catalogs can be purchased on our website. No proprietary tools are necessary if routine service is defined as daily inspections and oil/filter changes.	This is accepted as standard industry practice.	Benefits would be a faster response time that allows to real time communication of part number changes. This is communicated electronically to our dealers.
Attachment B: Scope of Work III.13.	The price increase must not produce a higher profit margin than the original contract, and must be accompanied by sufficient documentation and nationwide notice of price adjustment to the published commercial price list.	Our pricing is market based as well as impacts of inflation on cost of manufacturing (i.e.: cost of steel, cost of tires, etc.). We send notification to our dealer network of pending price increases at least 30 days in advance.	Industry standard practice for pricing construction equipment.	Allows for all OEMs to react to cost changes.
Attachment B: Scope of Work III.13.	Price Established at Time of Order. Pricing is established at the time an order is placed by a public entity with the Contractor. No retroactive price increases will be allowed, nor will price increases be allowed at time of delivery.	We will guarantee the price on a quote if a PO is received within 30 days.	Our quote and PO process gives customers confidence of a price for 30 days.	Confidence to customer of price required to purchase a machine.
Attachment D: Sample Master Agreement III.3.1.1 & 3.1.2	3.1.1 A Participating Entity's Participating Addendum ("PA"); 3.1.2 NASPO ValuePoint Master	We will not require the dealers to provide these documents in paper form. At the request of the	Simplifies acquisition process and less paperwork for the dealer and customer. All requested	Less paperwork to speed up the acquisition process.



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	Agreement, including all attachments thereto;	customer, these documents can be provided electronically.	information will be available in electronic form if required.	
Attachment D: Sample Master Agreement 3.1.4	3.1.4 The Solicitation or, if separately executed after award, the Lead State's bilateral agreement that integrates applicable provisions;	Governmental solicitations are generally created electronically and publicly available.	Here, we are just clarifying that these documents are already available electronically to the public and shouldn't need to be included with every order.	Simplified acquisition process for the customer.
Attachment D: Sample Master Agreement 3.1.5	3.1.5 Contractor's response to the Solicitation, as revised (if permitted) and accepted by the Lead State.	Contractor in this instance for our response will be our independently owned dealer network. Quotes will be provided in electronic or paper form, or both at the request of the customer.	Here, we are just clarifying that these documents are already available electronically to the public and shouldn't need to be included with every order.	Simplified acquisition process for the customer.
Attachment D: Sample Master Agreement V.5.2.1	The NASPO ValuePoint Administrative Fee must be submitted quarterly and is based on all sales of products and services under the Master Agreement (less any charges for taxes or shipping).	We will pay the NASPO ValuePoint Admin Fee on John Deere contracted items only. Dealer provided services or third party attachments are not part of our contracted items and therefore would not have an admin fee paid on them.	Third party attachments requested by the customer are not on our price pages, therefore no admin fee will be paid on these items.	Provides clarity on which contract items we are submitting on contract versus other OEM non John Deere attachments that are requested by the customer.
Attachment D: Sample Master Agreement V.5.3.4	5.3.4 Sales Data Crosswalks. Upon request by NASPO ValuePoint, Contractor shall provide to NASPO ValuePoint tables of customer and Product information and specific attributes thereof for the purpose of standardizing and analyzing reported Sales Data ("Crosswalks"). Customer Crosswalks must include a list of existing and potential Purchasing Entities and identify for each the appropriate customer type as defined by NASPO ValuePoint. Product	Our price pages for our products in this proposal are available with base code and current list price of all options that we are proposing on this contract. Customer information can be provided for sales being reported, but we have no way to report potential customers. This should be available to all states requesting a PA as only governmental customers are eligible to purchase on this contract.	Customers that are eligible to purchase on this proposed contract are governmental agencies within each state.	All eligible customers can view what is on contract to determine what is available to purchase.



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	Crosswalks must include Contractor's part number or SKU for each Product in Offeror's catalog and identify for each the appropriate Master Agreement category (and subcategory, if applicable), manufacturer part number, product description, eight-digit UNSPSC Class Level commodity code, and (if applicable) EPEAT value and Energy Star rating. Crosswalk requirements and fields may be updated by NASPO ValuePoint with reasonable notice to Contractor and without amendment to this Master Agreement. Contractor shall work in good faith with NASPO ValuePoint to keep Crosswalks updated as Contractor's customer lists and product catalog change.			
Attachment D: Sample Master Agreement VI.6.1, 6.1.1, 6.1.2, 6.1.3	Includes all verbiage within VI 6.1, 6.1.1, 6.1.2 and 6.1.3	Our pricing on this contract is based on the current base list price. This does not include options that are chosen by the customer to meet their specs. Discount rates will be guaranteed throughout the initial term of the contract. As stated within Scope of Work III.13 Price Adjustment, our pricing is based on the current list price at the time of quote. When price increases occur on our products, we will advise the Lead State of these increases and provide supporting	Each of our products has multiple options that are available to meet job site requirements. Prices vary by options selected by the customer. Our prices will be based on current list price at time of quote.	Allows the customer to order a fully configured machine that is specific to their application needs.



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		documentation for these changes.		
Attachment D: Sample Master Agreement 6.2	Payments may be made via a purchasing card with no additional charge.	There is a 3% surcharge for P-card payments.	This is an industry standard practice, but P-card payment is not typical for purchasing construction equipment.	This is an industry standard practice, but P-card payment is not typical for purchasing construction equipment.
Attachment D: Sample Master Agreement 6.3	6.3 Leasing or Alternative Financing Methods. The procurement and other applicable laws of some Purchasing Entities may permit the use of leasing or alternative financing methods for the acquisition of Products under this Master Agreement. Where the terms and conditions are not otherwise prescribed in an applicable Participating Addendum, the terms and conditions for leasing or alternative financing methods are subject to negotiation between the Contractor and Purchasing Entity.	We are not offering leasing or alternative financing methods on this contract. However, the customer is able to use third party financial solutions, such as John Deere Financial, that can be negotiated with the dealer.	Allows the customer flexibility to use whatever financial institution they choose to support their purchase.	Allows the customer flexibility to use whatever financial institution they choose to support their purchase.
Attachment D: Sample Master Agreement VII.7.5.1	7.5.1 Orders must be placed pursuant to this Master Agreement prior to the termination date thereof, but may have a delivery date or performance period up to 120 days past the then-current termination date of this Master Agreement.	Based on current market conditions we cannot guarantee delivery within 120 days. Delivery will be communicated with the purchasing entity.	Due to current demand and market conditions, we cannot guarantee this timeframe. All delivery timeframes will be communicated at the time of receipt of purchase order.	Clear communication with customers prior to accepting purchase order.
Attachment D: Sample Master Agreement VII.7.5.3	7.5.3 Financial obligations of Purchasing Entities payable after the current applicable fiscal year are contingent upon agency funds for that purpose being appropriated, budgeted, and	Once a purchase order has been issued, we cannot cancel an order and will expect payment from the purchasing entity upon delivery.	Construction equipment is a high dollar acquisition item that is custom built to the customer specifications. Once the PO is issued and the order is placed, we do not allow the canceling of an order.	Clear communication to the customer prior to accepting the purchase order to eliminate the risk of a cancel request.



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	otherwise made available			
Attachment D: Sample Master Agreement VIII.8.1	Shipping Terms. All deliveries will be F.O.B. destination, freight pre-paid, with all transportation and handling charges paid by the Contractor.	Freight will be paid by the customer and added on the quote/invoice as a separate line item.	This allows us to offer our best discount to all customers taking out the variability of freight costs. Freight costs vary greatly for construction equipment based on the size, weight and distance required.	Benefit to the customer is transparency of machine cost versus freight cost. Risk would be a lower discount to all customers if freight were to be included.
Attachment D: Sample Master Agreement VIII.8.1.1	Notwithstanding the above, responsibility and liability for loss or damage will remain the Contractor's until final inspection and acceptance when responsibility will pass to the Purchasing Entity except as to latent defects, fraud, and Contractor's warranty obligations.	Contractor could be replaced by independent dealer depending on how the order is placed.	This is clarification that delivery could be performed by a local dealer. This does not change the transfer of ownership process.	Customer is working directly with the local dealer.
Attachment D: Sample Master Agreement VIII.8.2 & 8.3 & 8.4	Includes all verbiage within all 3 of these sections.	None of these sections are applicable to the sale of construction equipment.	Construction equipment are large pieces of equipment that are delivered by a truck and trailer, so these sections don't seem to fit within the scope of this RFP.	Clarity on delivery of construction equipment.
Attachment D: Sample Master Agreement IX.9.3	Inspection. All Products are subject to inspection at reasonable times and places before Acceptance. Contractor shall provide right of access to the Lead State, or to any other authorized agent or official of the Lead State or other Participating or Purchasing Entity, at reasonable times, to monitor and evaluate performance, compliance, and/or quality assurance requirements under this Master Agreement.	This can be coordinated with the local dealer prior to final delivery.	Construction equipment is typically a single unit purchase that is built at a factory and delivered by our dealers in the local market. Customers have the right to coordinate inspection of the machine at the local dealership prior to delivery.	This allows for a better relationship between the customers and the local dealers.



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Attachment D: Sample Master Agreement IX.9.4	9.4 Failure to Conform. If any services do not conform to contract requirements, the Purchasing Entity may require the Contractor to perform the services again in conformity with contract requirements, at no increase in Order amount. When defects cannot be corrected by re-performance, the Purchasing Entity may require the Contractor to take necessary action to ensure that future performance conforms to contract requirements and reduce the contract price to reflect the reduced value of services performed.	Quotes are provided to the customer based on construction equipment bid specifications made public. Any defects of machine delivered will be corrected per our warranty statement that is part of this bid submission.	Construction equipment purchases are typically single unit deals. Any defects will be addressed our warranty statement that is submitted with our response.	Clear communication of our warranty process to the customer to stand behind our products.
Attachment D: Sample Master Agreement IX.9.5	Includes all verbiage within 9.5, 9.5.1, 9.5.2, 9.5.3, 9.5.4, 9.5.5	We will not be able to comply with this section, as this RFP is for construction equipment. There is no testing period with the products, and we do not accept returns. If there are demo machines available with a local dealer, a demo can be arranged, but this is not guaranteed that a demo machine would be available.	Industry standard for purchasing construction equipment is that customers are publishing their specifications requirements and we clearly communicate what our machine options are at time of quote.	Clear communication to the customer on their specific needs.
Attachment D: Sample Master Agreement X	Includes all verbiage within X 10.1, 10.2, 10.3, 10.4, 10.5	We will follow our standard warranty statement which has been provided within our RFP response.	We have an industry leading warranty policy detailed in our warranty statement submitted in this RFP.	Clear communication to the customer about warranty.
Attachment D: Sample Master Agreement XIII.12.1	subcontractors	John Deere does not use subcontractors; we have independently owned dealerships that are authorized to sell our equipment on our behalf.	This was clarification around the definition of subcontractors versus our independently owned dealerships.	This was clarification around the definition of subcontractors versus our independently owned dealerships.



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Attachment D: Sample Master Agreement XIII.13.3.1	\$1 million per occurrence and \$2 million general aggregate;	There is a discrepancy between the COI requirements listed here and what is listed within Scope of Work III.2.A.(1). Clarification will be needed before a COI can be issued if we are awarded this contract.	We will provide a COI based on the final contract requirements if awarded a contract.	We will provide a COI based on the final contract requirements if awarded a contract.

[Add additional rows as needed.]

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Attachment I
COST PROPOSAL
Amended February 17, 2023

INSTRUCTION:
1. This Cost Proposal form consists of multiple sections (tabs at the bottom of this spreadsheet): ---Section 1: Number of Proposed Categories (Green Tab) ---Section 2: Market Basket Evaluation (Orange Tab) ---Section 3: Discount % Off Evaluation (Blue Tabs) -----Heavy Equipment Discount % -----Heavy Equipment Value Add -----Industrial Equipment Discount % -----Industrial Equipment Value Add
2. Offeror must complete all required elements of this Cost Proposal. The format and structure of the Cost Proposal is intended to allow for a fair evaluation of like costs among Offerors. Deviation from the format or structure of this Cost Proposal may result in Offeror's proposal being deemed non-responsive.
2. Offeror is wholly responsible for ensuring figures and calculations submitted in Offeror's completed Cost Proposal are accurate, even if formulas have been provided by the Lead State as a courtesy.
3. Inclusion of cost or pricing information in any document other than this Cost Proposal may result in Offeror's proposal being deemed non-responsive.
4. Offeror's Cost must be inclusive of all fees and charges, including but not limited to fees or charges for shipping, delivery, credit card payments, or personnel.
5. In addition to the Cost Proposal evaluation described in this RFP, Cost Proposals may also be subject to an independent review for reasonableness and best value by the Lead State. Costs determined not to be reasonable or best-value by the Lead State may result in all or part of Offeror's proposal being rejected, notwithstanding the results of the Cost Proposal evaluation.
6. It is Offerors responsibility to ensure it has completed all tabs and required inputs based on its proposed products & services.

Attachment I

COST PROPOSAL

Section 1 - Number of Proposed Categories

ADDITIONAL INSTRUCTION:

1. Offeror is to input in the **blue** highlighted fields "Yes" or "No" on whether Offeror is seeking an award in the respective Category.
2. Offeror should input "No" if it is not proposing for the given Category. If a field is left blank it is assumed that Offeror is not proposing for an award in that Category.
3. All Categories Offeror selects that "Yes" it is proposing for an award must subsequently include a complete proposal to Section 2 (Market Basket Evaluation) and Section 3 (Discount % Off Evaluation) for the respective Category. Failure to submit a complete Cost Proposal for each Category Offeror is seeking an award in may result in disqualification of Offeror's proposal to that Category.

Category #	Category Description	Select Yes / No for what Categories you are Seeking an Award In
Heavy Equipment		
1	Articulated Dump Haulers	Yes
2	Articulated Haulers	No
3	Backhoes	Yes
4	Planer / Cold Planer	No
5	Compactors: Road, Asphalt, & Landfill	No
6	Dozers	Yes
7	Motor Graders	Yes
8	Pavers	No
9	Reclaimers	No
10	Site Dumpers	No
11	Skid Steers	Yes
12	Telehandlers	No
13	Track Excavators	Yes
14	Tracked Loaders	Yes
15	Wheel Loaders	Yes
16	Wheeled Excavator	Yes
17	Sweepers: Airport Runway, Riding, Parking Lot, Sidewalk, and Street	No
18	Asphalt Distributor	No
19	Chip Spreader	No
20	Crack Router/Sealant	No
21	Ditcher	No
22	Emulsion Tank	No
23	Patch Truck, Patchers	No
24	Road Widener	No
25	Scraper, Screed	No
26	Sprayer/Water Truck/Water Tank	No
27	Stabilizer	No

Attachment I
COST PROPOSAL
Section 1 - Number of Proposed Categories

Industrial Equipment		
1	Air Compressors	No
2	Backup Battery Pack	No
3	Generators	No
4	Forklifts	No
5	Light Tower	No

of Categories Seeking an Award In -->

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Attachment I
COST PROPOSAL
Section 2 - Market Basket Evaluation
Amended February 17, 2023 (edits in red ink)

ADDITIONAL INSTRUCTIONS:	
1.	Offeror must complete all required fields (fields in a blue highlight) on this Cost Proposal. The format and structure of the Cost Proposal is intended to allow for a fair market basket type evaluation of like costs among Offerors. Deviation from the format or structure of this Cost Proposal may result in Offeror's proposal being deemed non-responsive.
2.	Offeror is wholly responsible for ensuring figures and calculations submitted in Offeror's completed Cost Proposal are accurate, even if formulas have been provided by the Lead State as a courtesy.
3.	Categories 5 (Compactors) and 17 (Sweepers) within Heavy Equipment portion include sub-categories. Offeror must propose for each sub-category of an overall Category in order to be considered for an award in that Category. Failure to propose each sub-category of an overall Category may result in disqualification of Offeror's proposal from that Category.
4.	The "Minimum Product Specifications" in column C represent the minimum spec. Offeror is to assess its own inventory of equipment to meet these minimum specifications and input in columns D to H the proposed Equipment.

Category #	Category	Minimum Product Specifications	Offeror's Proposed Product	Specifications for Offeror's Proposed Product	List Price	Minimum Discount % Off	Extended Price	
Heavy Equipment								
1	Articulated Dump Haulers	Net Power --- 235 kW (321 hp) at 1,900 rpm Rated Payload --- 53,300 lbs. Heaped Capacity --- 15.0 m ³ (19.6 cu. yd.)	260 P-Tier	Net Power: 321 HP Rated Payload: 53,334 lbs. Heaped Capacity: 19.6 cu. Yd	\$ 603,501.00	27.00%	\$ 440,555.73	This is the current list price, with a standard configuration. *Freight is not included *P-card surcharge not included *PDI is not included *If applicable, tax is not included
2	Articulated Haulers	Net Power --- 465 hp Payload capacity --- 45 sh tn Body volume, SAE 2:1 heap --- 32 yd ³	N/A					
3	Backhoes	Net Peak Power --- 75 kW (100 hp) at 1,600 rpm Standard Dipperstick Digging Depth --- 4.30 m (14 ft. 1 in.) Operating Weight --- 14,600 lbs.	310 P-Tier	Net Power: 100 HP Standard Dipperstick Digging Depth: 14 ft. 1 in Operating Weight: 14,669 lbs.	\$ 189,471.00	41.00%	\$ 111,787.89	This is the current list price, with a standard configuration. *Freight is not included *P-card surcharge not included *PDI is not included *If applicable, tax is not included
4	Planer / Cold Planer	Rotor Width --- 83-inch Rotor Depth --- 12-inch Operating Weight --- 41,000 lbs. Load Sensing Propel System High capacity, versatile convey	N/A					
5 - a	Compactors: Road	Impact Force --- 30KN Speed --- 0-5km/hour Drum Width --- 800mm * 500mm Climbing --- 25%	N/A					
5 - b	Compactors: Asphalt	Operating Weight (with ROPS) --- 10,000 kg. Rated Engine Power --- 80 kW. Drum or Rolling Width --- 1,530 mm.	N/A					
5 - c	Compactors: Landfill	Operating Weight --- 90207 lbs. Gross Power --- 435 HP Net Power --- 405 HP	N/A					
6	Dozers	Net Power --- 69 kW (92 hp) at 2,200 rpm Operating Weight --- 30,000 lb. Track on Ground --- 2 184 mm (86 in.)	550 P-Tier	Net Power: 92 hp Operating Weight: 21,000 lbs. Track on Ground: 86 in.	\$ 215,238.00	25.00%	\$ 161,428.50	This is the current list price, with a standard configuration. *Freight is not included *P-card surcharge not included *PDI is not included *If applicable, tax is not included
7	Motor Graders	Net power, gears 1 and 2 --- 165 horsepower; 123 kilowatts Net power, gears 3 through to 6 --- 185 horsepower; 138 kilowatts Number of cylinders --- 6 Displacement --- 10.3 litres (629 cubic inches)	672GP	Net power, gears 1 and 2: 200-210 hp Net power, gears 3 through to 8: 225-255 hp Number of cylinders: 6 Displacement: 548 cubic inches	\$ 642,235.00	41.00%	\$ 378,918.65	This is the current list price, with a standard configuration. *Freight is not included *P-card surcharge not included *PDI is not included *If applicable, tax is not included
8	Pavers	Gross Power --- 225 HP Standard Paving Range --- 3 - 6 m (9' 10"-19' 6") Operating Weight - With SE60 V --- 45090 lb	N/A					
9	Reclaimers	Operating Weight --- 50000 lbs Cutting/Mining Width --- 96 inches Gross Power --- 415.7 HP	N/A					
10	Site Dumpers	Gross Engine Power --- 74 hp (55 kW) Payload --- 13,228 lbs (6,000 kg) Bucket Capacity --- 4.2 yd ³ (3.19 m ³)	N/A					
11	Skid Steers	Rated Operating Capacity --- 795 kg (1,750 lb.) Gross Horsepower --- 48.5 kW (65 hp) Net Horsepower --- 45.6 kW (61 hp) Operating Weight --- 2806 kg (6,180 lb.)	316GR	Rated Operating Capacity: 1,750 lbs. Gross Horsepower: 65 hp Net Horsepower: 61 hp Operating Weight: 6,180 lbs.	\$ 66,945.00	28.00%	\$ 48,200.40	This is the current list price, with a standard configuration. *Freight is not included *P-card surcharge not included *PDI is not included *If applicable, tax is not included
12	Telehandlers	Maximum Lift Capacity --- 10000 lb / 4535.92 kg Outriggers Up Lift Height --- 55 ft / 16.76 m Outriggers Up Forward Reach --- 42 ft / 12.8 m Lift Capacity at Full Height --- 5000 lb / 2267.96 kg	N/A					
13	Track Excavators	Net Power --- 73 kW (98 hp) Digging Depth --- 19 ft Operating Weight --- 13 407 kg (29,531 lb.)	130 P-Tier	Net Power: 88 hp Digging Depth: 19 ft. 9 in. Operating Weight: 29,531 lbs.	\$ 268,554.00	31.00%	\$ 185,302.26	This is the current list price, with a standard configuration. *Freight is not included *P-card surcharge not included *PDI is not included *If applicable, tax is not included
14	Tracked Loaders	Rated Operating Capacity --- 1176 kg (2,590 lb.) Gross Horsepower --- 54.8 kW (74 hp) Net Horsepower --- 52.5 kW (70 hp) Operating Weight --- 4313 kg (9,500 lb.)	210 P-Tier	Rated Operating Capacity: Gross Horsepower: 102 hp Net Horsepower: 100 hp Operating Weight: 11,326 lbs.	\$ 164,875.00	37.00%	\$ 103,871.25	This is the current list price, with a standard configuration. *Freight is not included *P-card surcharge not included *PDI is not included *If applicable, tax is not included
15	Wheel Loaders	Net Power --- 47 kW (62 hp) at 2,200 rpm Operating Weight --- 11,100 lbs. Bucket Capacity --- 0.7-1.1 m ³ (0.9-1.4 cu. yd.)	204 G-Tier	Net Power: 62 hp Operating Weight: 11,508 lbs. Bucket Capacity: 0.9-1.4 cu. Yd.	\$ 128,726.00	24.00%	\$ 97,831.76	This is the current list price, with a standard configuration. *Freight is not included *P-card surcharge not included *PDI is not included *If applicable, tax is not included
16	Wheeled Excavator	Net Power --- 129 kW (173 hp) Digging Depth --- 5.83 m (19 ft. 2 in.) Operating Weight --- 19,700 kg (43,431 lb.)	190GW	Net Power: 173 hp Digging Depth: 19 ft. 2 in. Operating Weight: 43,431 lbs.	\$ 441,320.00	42.00%	\$ 255,965.60	This is the current list price, with a standard configuration. *Freight is not included *P-card surcharge not included *PDI is not included *If applicable, tax is not included
17 - a	Sweepers: Airport Runway	Net Power --- 99 HP @ 2200 RPM (74 kW) Hopper Capacity --- 7 cubic yards Payload --- 10,000 lbs. Speed - 22 MPH	N/A					
17 - b	Sweepers: Riding	Hopper tank capacity --- 26 gallon Water tank capacity --- 7 gallon Suitable for both indoor and outdoor use in dry conditions.	N/A					
17 - c	Sweepers: Parking Lot	Cleaning Path --- 50", 64" Hopper Capacity --- 8.8 cu ft Productivity --- 108,791 sqft/hr	N/A					
17 - d	Sweepers: Sidewalk	Load Capacity --- 0.12 - 0.14 T Sweeping Width --- 49.21 - 51.96 inch Speed --- 9 MPH	N/A					
18	Asphalt Distributor	Configuration --- Skid Performance --- 5.5 HP Capacity --- 250 gallons Hose --- 51' x 40'	N/A					
19	Chip Spreader	Spread Width --- 5400mm Engine --- 7.7 Liter 6cyl. (320hp) Hydraulic Tank --- 360 Liter Belts --- Two 500 mm w. belt conveyors	N/A					
20	Crack Router/Sealant	Capacity --- 265 gallons at ambient temperature --- Jacket shall wrap around 100% of the outside area of the circular material tank and bottom and allow for complete circulation of the heated transfer oil. --- Heat transfer oil tank design shall provide a center tower of a minimum 18 inches (7.08 cm) in height to provide efficient melting and uniform product heating. --- At no point in the tank shall there be a distance of greater than 12 inches (30.48 cm) from a heat surface.	N/A					
21	Ditcher	Clearing Width --- 22 inches wide Clearing Depth --- 11 inches deep Number of Blades --- 3 blades	N/A					

Attachment I
COST PROPOSAL
Section 2 - Market Basket Evaluation
Amended February 17, 2023 (edits in red ink)

ADDITIONAL INSTRUCTION:						
1. Offeror must complete all required fields (fields in a blue highlight) on this Cost Proposal. The format and structure of the Cost Proposal is intended to allow for a fair market basket type evaluation of like costs among Offerors. Deviation from the format or structure of this Cost Proposal may result in Offeror's proposal being deemed non-responsive.						
2. Offeror is wholly responsible for ensuring figures and calculations submitted in Offeror's completed Cost Proposal are accurate, even if formulas have been provided by the Lead State as a courtesy.						
3. Categories 5 (Compactors) and 17 (Sweepers) within Heavy Equipment portion include sub-categories. Offeror must propose for each sub-category of an overall Category in order to be considered for an award in that Category. Failure to propose each sub-category of an overall Category may result in disqualification of Offeror's proposal from that Category.						
4. The "Minimum Product Specifications" in column C represent the minimum spec. Offeror is to assess its own inventory of equipment to meet these minimum specifications and input in columns D to H the proposed Equipment.						

Category #	Category	Minimum Product Specifications	Offeror's Proposed Product	Specifications for Offeror's Proposed Product	List Price	Minimum Discount % Off	Extended Price
22	Emulsion Tank	--- 10,000 Gallon Capacity --- 1/2" plate steel construction --- Foam Glass Block Insulation on tank bottom --- Ribbed steel panel outer skin (covers tank insulation) --- Liquid Level scale reader	N/A				
23	Patch Truck, Patchers	Capacity --- Cubic Yards --- 5.0 Capacity --- Ton --- 6.0 Loading Height --- 100" Heat Transfer Oil Capacity --- 150 Gallon	N/A				
24	Road Widener	Operating Width --- 10' Transport Width --- 10' Hopper Capacity --- 3.24 yd³ Conveyor Length --- 10" Conveyor Width --- 24" Belt Speed --- 400 fpm Working Speed --- 270 fpm Transport Speed --- 9mph Turning Radius --- 13'	N/A				
25	Scraper, Screed	Power --- 5.5HP Working Width --- 405mm Working Depth --- 260mm	N/A				
26	Sprayer/Water Truck/Water Tank	Capacity --- 4,000 gallons Man-Way --- 24" Round Man-Way Fill Pipe --- 2-1/2" Pipe and Cam Groove Coupler Ladder --- rear mounted	N/A				
27	Stabilizer	Outline Voltage (L+L) --- 240V AC Output Accuracy --- + - 2-4%	N/A				
Industrial Equipment							
1	Air Compressors	Tank Size --- 60 Gallon Pressure --- 150 PSI CFM @ 40 PSI --- 13.4 CFM @ 90 PSI --- 11.5 Running HP --- 3.7	N/A				
2	Backup Battery Pack	Battery Capacity --- 258 kWh Power Rating --- 120 KVA DC Bus Voltage --- 358 Volts DC Amp Hours --- 720 Ah	N/A				
3	Generators	Generator Fuel Type --- Ultra Low Sulfur Diesel Generator Voltage --- 12VDC Run Time at Full Load --- 28 hours Fuel Tank Capacity --- 62 gallon Portable Generator	N/A				
4	Forklifts	Load Capacity --- 6,000 lbs Lift Height --- 23 feet Aisle Widths --- 11 to 12 feet Outdoor and indoor use	N/A				
5	Light Tower	Height --- 23 feet Compact Design Aim lights from the ground Heavy gauge all-steel under carriage Trailer --- MIG welded, unibody-style Tow hitch Lamps --- Four 1000 W metal halide lamps Luminosity --- 110,000 lm per lamp & 440,000 lm total initial intensity	N/A				

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Attachment I
COST PROPOSAL
Section 3 - Discount % Off Evaluation
Heavy Construction Equipment

ADDITIONAL INSTRUCTION:

- Offeror must complete all required fields (fields in a **blue** highlight) on this Cost Proposal. The format and structure of the Cost Proposal is intended to allow for a fair discount % off type evaluation of like costs among Offerors. Deviation from the format or structure of this Cost Proposal may result in Offeror's proposal being deemed non-responsive.
- It has been determined that the best pricing structure for this portion of the evaluation is a simple "percentage off" of the most current dated Supplier's suggested government or commercial catalog or price list. The pricing matrix is a percentage off the Supplier's Suggested Retail Price. Suppliers can submit actual pricing schedules for their equipment though, with the percentage discount already figured, as long as the Supplier list price is stated first, then the discount, then the final discount price. You will have to keep it updated as pricing changes occur.
- Within the tables, if you have different discounts for different brands / models / sizes of equipment or options, you WILL have to list the items. If you need more space, insert additional lines as necessary. Light blue highlighted cells signify a requested vendor input.

MINIMUM DISCOUNT % OFF TABLE

Category #	Offered Minimum Discount % Off			
	Hard type value ONLY if offering a single % for the entire category -->			
1 ARTICULATED DUMP HAULERS	27.0%			
Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
260 P-Tier	01Nov22 (Base List Price)	\$ 579,095.00	27.0%	\$ 422,739.35
310 P-Tier	01Nov22 (Base List Price)	\$ 643,204.00	27.0%	\$ 469,538.92
410 P-Tier	01Nov22 (Base List Price)	\$ 810,390.00	27.0%	\$ 591,584.70
460 P-Tier	01Nov22 (Base List Price)	\$ 935,290.00	27.0%	\$ 682,761.70
ADT Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various
2 ARTICULATED HAULERS	N/A			
Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
3 BACKHOES	36.5%			
Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
310 G-Tier	01Nov22 (Base List Price)	\$ 139,888.00	41.0%	\$ 82,533.92
310 P-Tier	01Nov22 (Base List Price)	\$ 154,068.00	41.0%	\$ 90,900.12
320 P-Tier	01Nov22 (Base List Price)	\$ 165,753.00	41.0%	\$ 97,794.27
410 P-Tier	01Nov22 (Base List Price)	\$ 192,755.00	40.0%	\$ 115,653.00
710 P-Tier	01Nov22 (Base List Price)	\$ 278,349.00	41.0%	\$ 164,225.91
Backhoe Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various
210 G-Tier	01Nov22 (Base List Price)	\$ 131,416.00	37.0%	\$ 82,792.08
210 P-Tier	01Nov22 (Base List Price)	\$ 138,699.00	37.0%	\$ 87,380.37
Tractor Loader Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various
4 PLANER/COLD PLANER	N/A			
Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
5 COMPACTORS:	N/A			
A. ROAD	N/A			
Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
B. ASPHALT	N/A			
Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

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C. LANDFILL

Hard type value if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

6 DOZERS

Hard type value ONLY if offering a single % for the entire sub-category -->

26.5%

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
450 P-Tier	01Nov22 (Base List Price)	\$ 166,251.00	25.0%	\$ 124,688.25
550 P-Tier	01Nov22 (Base List Price)	\$ 202,690.00	25.0%	\$ 152,017.50
650 P-Tier	01Nov22 (Base List Price)	\$ 231,687.00	27.0%	\$ 169,131.51
700L	01Nov22 (Base List Price)	\$ 247,163.00	23.0%	\$ 190,315.51
750L	01Nov22 (Base List Price)	\$ 371,813.00	23.0%	\$ 286,296.01
850L	01Nov22 (Base List Price)	\$ 461,738.00	25.0%	\$ 346,303.50
950K	01Nov22 (Base List Price)	\$ 775,723.00	32.0%	\$ 527,491.64
1050K	01Nov22 (Base List Price)	\$ 942,606.00	32.0%	\$ 640,972.08
Crawler Dozer Base Coded Attachments		Various	14.0%	Various

7 MOTOR GRADERS

Hard type value ONLY if offering a single % for the entire sub-category -->

41.3%

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
620G	01Nov22 (Base List Price)	\$ 406,737.00	40.0%	\$ 244,042.20
622G	01Nov22 (Base List Price)	\$ 466,706.00	40.0%	\$ 280,023.60
670G	01Nov22 (Base List Price)	\$ 452,847.00	41.0%	\$ 267,179.73
672G	01Nov22 (Base List Price)	\$ 499,452.00	41.0%	\$ 294,676.68
770G	01Nov22 (Base List Price)	\$ 488,841.00	42.0%	\$ 283,527.78
772G	01Nov22 (Base List Price)	\$ 543,433.00	42.0%	\$ 315,191.14
870G	01Nov22 (Base List Price)	\$ 530,304.00	42.0%	\$ 307,576.32
872G	01Nov22 (Base List Price)	\$ 602,979.00	42.0%	\$ 349,727.82
Motor Grader Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various

8 PAVERS

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

9 RECLAIMERS

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

10 SITE DUMPERS

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

11 SKID STEERS

Hard type value ONLY if offering a single % for the entire sub-category -->

26.7%

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
316GR	01Nov22 (Base List Price)	\$ 56,099.00	28.0%	\$ 40,391.28
318G	01Nov22 (Base List Price)	\$ 61,100.00	28.0%	\$ 43,992.00
320G	01Nov22 (Base List Price)	\$ 64,013.00	28.0%	\$ 46,089.36
324G	01Nov22 (Base List Price)	\$ 66,933.00	28.0%	\$ 48,191.76
330G	01Nov22 (Base List Price)	\$ 79,144.00	28.0%	\$ 56,983.68
332G	01Nov22 (Base List Price)	\$ 91,670.00	28.0%	\$ 66,002.40
Skid Steer Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various
317G	01Nov22 (Base List Price)	\$ 71,728.00	28.0%	\$ 51,644.16
325G	01Nov22 (Base List Price)	\$ 82,391.00	28.0%	\$ 59,321.52
331G	01Nov22 (Base List Price)	\$ 95,523.00	28.0%	\$ 68,776.56
333G	01Nov22 (Base List Price)	\$ 114,389.00	28.0%	\$ 82,360.08
Compact Track Loader Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various

12 TELEHANDLERS

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

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Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

13 TRACK EXCAVATORS

Hard type value **ONLY** if offering a single % for the entire sub-category -->

29.0%

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
75 P-Tier	01Nov22 (Base List Price)	\$ 150,075.00	31.0%	\$ 103,551.75
85 P-Tier	01Nov22 (Base List Price)	\$ 161,812.00	31.0%	\$ 111,650.28
130 P-Tier	01Nov22 (Base List Price)	\$ 239,435.00	31.0%	\$ 165,210.15
135 P-Tier	01Nov22 (Base List Price)	\$ 275,205.00	31.0%	\$ 189,891.45
160 P-Tier	01Nov22 (Base List Price)	\$ 272,148.00	31.0%	\$ 187,782.12
200 G-Tier	01Nov22 (Base List Price)	\$ 280,145.00	31.0%	\$ 193,300.05
210 P-Tier	01Nov22 (Base List Price)	\$ 296,258.00	31.0%	\$ 204,418.02
245 P-Tier	01Nov22 (Base List Price)	\$ 369,287.00	31.0%	\$ 254,808.03
250 P-Tier	01Nov22 (Base List Price)	\$ 356,003.00	31.0%	\$ 245,642.07
300 P-Tier	01Nov22 (Base List Price)	\$ 410,036.00	31.0%	\$ 282,924.84
345 P-Tier	01Nov22 (Base List Price)	\$ 492,054.00	31.0%	\$ 339,517.26
350 P-Tier	01Nov22 (Base List Price)	\$ 364,652.00	31.0%	\$ 251,609.88
380 P-Tier	01Nov22 (Base List Price)	\$ 406,187.00	31.0%	\$ 280,269.03
470 P-Tier	01Nov22 (Base List Price)	\$ 561,201.00	31.0%	\$ 387,228.69
670 P-Tier	01Nov22 (Base List Price)	\$ 1,022,000.00	31.0%	\$ 705,180.00
870 P-Tier	01Nov22 (Base List Price)	\$ 1,340,029.00	31.0%	\$ 924,620.01
Excavator Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various
17 P-Tier	01Feb23 (Base List Price)	\$ 41,954.00	26.0%	\$ 31,045.96
26 P-Tier	01Feb23 (Base List Price)	\$ 50,978.00	26.0%	\$ 37,723.72
30 P-Tier	01Feb23 (Base List Price)	\$ 60,898.00	26.0%	\$ 45,064.52
35 P-Tier	01Feb23 (Base List Price)	\$ 67,232.00	26.0%	\$ 49,751.68
50 P-Tier	01Feb23 (Base List Price)	\$ 91,229.00	26.0%	\$ 67,509.46
60 P-Tier	01Feb23 (Base List Price)	\$ 107,229.00	26.0%	\$ 79,349.46
Compact Excavator Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various

14 TRACKED LOADERS

Hard type value **ONLY** if offering a single % for the entire sub-category -->

27.0%

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
655K	01Nov22 (Base List Price)	\$ 309,297.00	27.0%	\$ 225,786.81
755K	01Nov22 (Base List Price)	\$ 434,432.00	27.0%	\$ 317,135.36
Crawler Loader Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various

15 WHEEL LOADERS

Hard type value **ONLY** if offering a single % for the entire sub-category -->

29.8%

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
444 P-Tier	01Nov22 (Base List Price)	\$ 219,738.00	37.0%	\$ 138,434.94
524 P-Tier	01Nov22 (Base List Price)	\$ 246,799.00	38.0%	\$ 153,015.38
544 G-Tier	01Nov22 (Base List Price)	\$ 239,945.00	34.0%	\$ 158,363.70
544 P-Tier	01Nov22 (Base List Price)	\$ 270,619.00	38.0%	\$ 167,783.78
624 P-Tier	01Nov22 (Base List Price)	\$ 301,598.00	37.0%	\$ 190,006.74
644 G-Tier	01Nov22 (Base List Price)	\$ 332,855.00	32.0%	\$ 226,341.40
644 P-Tier	01Nov22 (Base List Price)	\$ 363,030.00	33.0%	\$ 243,230.10
644 X-Tier	01Nov22 (Base List Price)	\$ 368,528.00	36.0%	\$ 235,857.92
724 P-Tier	01Nov22 (Base List Price)	\$ 389,453.00	33.0%	\$ 260,933.51
744 P-Tier	01Nov22 (Base List Price)	\$ 540,339.00	29.0%	\$ 383,640.69
824 P-Tier	01Nov22 (Base List Price)	\$ 568,967.00	29.0%	\$ 403,966.57
844 P-Tier	01Nov22 (Base List Price)	\$ 676,436.00	29.0%	\$ 480,269.56
904 P-Tier	01Nov22 (Base List Price)	\$ 731,956.00	29.0%	\$ 519,688.76
944 X-Tier	01Nov22 (Base List Price)	\$ 1,337,321.00	34.0%	\$ 882,631.86
Wheel Loader Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various
184 G-Tier	01Nov22 (Base List Price)	\$ 82,070.00	24.0%	\$ 62,373.20
204 G-Tier	01Nov22 (Base List Price)	\$ 105,315.00	24.0%	\$ 80,039.40
244 P-Tier	01Feb23 (Base List Price)	\$ 132,074.00	24.0%	\$ 100,376.24
304 G-Tier	01Nov22 (Base List Price)	\$ 124,283.00	24.0%	\$ 94,455.08
324 P-Tier	01Feb23 (Base List Price)	\$ 148,327.00	24.0%	\$ 112,728.52
344 P-Tier	01Feb23 (Base List Price)	\$ 202,235.00	24.0%	\$ 153,698.60
Compact Wheel Loader Base Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various

16 WHEELED EXCAVATOR

Hard type value **ONLY** if offering a single % for the entire sub-category -->

42.0%

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
190GW	01Nov22 (Base List Price)	\$ 419,587.00	42.0%	\$ 243,360.46
Excavator Based Coded Attachments	01Nov22 (Base List Price)	Various	14.0%	Various

17 SWEEPERS:

A. AIRPORT/RUNWAY, WALK BEHIND

Hard type value if offering a single % for the entire category -->

N/A

Hard type value **ONLY** if offering a single % for the entire sub-category -->

N/A

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Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

B. RIDING

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

C. PARKING LOT

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

D. SIDEWALK

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

E. STREET

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

18. ASPHALT DISTRIBUTOR

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

19. BROOM

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

20. CHIP SPREADER

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

21. CRACK ROUTER / SEALANT

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

22. DITCHER

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Request for Proposals for
Heavy Construction Industrial Equipment
Issued by the State of Oklahoma
Solicitation Number [#####]

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

23. CONVEYER: DRUM, SINGLE, DOUBLE, COMBI, STATIC

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

24. EMULSION TANK

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

25. MELTER, MILLS, MIXER

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

26. OIL DISTRIBUTOR

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

27. PATCH TRUCK, PATCHERS

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

28. ROAD WIDENER

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

29. ROLLER

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

30. SCRAPER, SCREED

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

31. SPRAYER/WATER TRUCK/ WATER TANK

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Request for Proposals for
Heavy Construction Industrial Equipment
Issued by the State of Oklahoma
Solicitation Number [#####]

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

32. STABILIZER

Hard type value ONLY if offering a single % for the entire sub-category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
				\$ -

Request for Proposals for
Heavy Construction Industrial Equipment
Issued by the State of Oklahoma
Solicitation Number [#####]

**Attachment I
COST PROPOSAL
Section 3 - Discount % Off Evaluation
Heavy Equipment Value Add Cost Evaluation and Contract Offering**

ADDITIONAL INSTRUCTION:

1. Within the tables, list the value add products / services you intend to provide under the resulting contract award. If you need more space, insert additional lines as necessary. Light blue highlighted cells signify a requested vendor input.

Value Add Cost

Category #

1 ARTICULATED DUMP HAULERS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

2 ARTICULATED HAULERS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

3 BACKHOES

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

4 PLANER/COLD PLANER

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

5 COMPACTORS:

A. ROAD

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

B. ASPHALT

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

C. LANDFILL

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

6 DOZERS

Request for Proposals for
Heavy Construction Industrial Equipment
Issued by the State of Oklahoma
Solicitation Number [#####]

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

7 MOTOR GRADERS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

8 PAVERS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

9 RECLAIMERS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

10 SITE DUMPERS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

11 SKID STEERS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

12 TELEHANDLERS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

13 TRACK EXCAVATORS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

14 TRACKED LOADERS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -

Request for Proposals for
Heavy Construction Industrial Equipment
Issued by the State of Oklahoma
Solicitation Number [#####]
[insert additional lines as necessary]

				\$ -
--	--	--	--	------

15 **WHEEL LOADERS**

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

16 **WHEELED EXCAVATOR**

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

17 **SWEEPERS:**

A. AIRPORT/RUNWAY, WALK BEHIND

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

B. RIDING

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

C. PARKING LOT

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

D. SIDEWALK

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

E. STREET

Hard type value **ONLY** if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

18. **ASPHALT DISTRIBUTOR**

Hard type value **ONLY** if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

19. **BROOM**

Hard type value **ONLY** if offering a single % for the entire sub-category --> N/A

Request for Proposals for
Heavy Construction Industrial Equipment
Issued by the State of Oklahoma
Solicitation Number [#####]

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

20. CHIP SPREADER

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

21. CRACK ROUTER / SEALANT

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

22. DITCHER

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

23. CONVEYER: DRUM, SINGLE, DOUBLE, COMBI, STATIC

type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

24. EMULSION TANK

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

25. MELTER, MILLS, MIXER

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

26. OIL DISTRIBUTOR

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

Request for Proposals for
Heavy Construction Industrial Equipment
Issued by the State of Oklahoma
Solicitation Number [#####]

27. PATCH TRUCK, PATCHERS

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

28. ROAD WIDENER

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

29. ROLLER

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

30. SCRAPER, SCREED

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

31. SPRAYER/WATER TRUCK/ WATER TANK

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

32. STABILIZER

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

33. OTHER (IN SCOPE)

Hard type value ONLY if offering a single % for the entire sub-category --> N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

Attachment I
COST PROPOSAL
Section 3 - Discount % Off Evaluation
Industrial Equipment

ADDITIONAL INSTRUCTION:

1. Offeror must complete all required fields (fields in a **blue** highlight) on this Cost Proposal. The format and structure of the Cost Proposal is intended to allow for a fair discount % off type evaluation of like costs among Offerors. Deviation from the format or structure of this Cost Proposal may result in Offeror's proposal being deemed non-responsive.
2. It has been determined that the best pricing structure for this portion of the evaluation is a simple "percentage off" of the most current dated Supplier's suggested government or commercial catalog or price list. The pricing matrix is a percentage off the Supplier's Suggested Retail Price. Suppliers can submit actual pricing schedules for their equipment though, with the percentage discount already figured, as long as the Supplier list price is stated first, then the discount, then the final discount price. You will have to keep it updated as pricing changes occur.
3. Within the tables, if you have different discounts for different brands / models / sizes of equipment or options, you WILL have to list the items. If you need more space, insert additional lines as necessary. Light blue highlighted cells signify a requested vendor input.

MINIMUM DISCOUNT % OFF TABLE

Category #					<u>Offered</u> <u>Minimum</u> <u>Discount %</u>	
					<u>Off</u>	
					N/A	
	Hard type value <u>ONLY</u> if offering a single % for the entire category -->				Minimum Discount % Off	Extended Price
1 AIR COMPRESSORS	Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price			
	N/A				\$	-
					\$	-
					\$	-
					\$	-
	[insert additional lines as necessary]				\$	-

Category #					<u>Offered</u> <u>Minimum</u> <u>Discount %</u>	
					<u>Off</u>	
					N/A	
	Hard type value <u>ONLY</u> if offering a single % for the entire category -->				Minimum Discount % Off	Extended Price
2 BACK UP BATTERY PACKS	Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price			
	N/A				\$	-
					\$	-
					\$	-
					\$	-
	[insert additional lines as necessary]				\$	-

Category #					<u>Offered</u> <u>Minimum</u> <u>Discount %</u>	
					<u>Off</u>	
					N/A	
	Hard type value <u>ONLY</u> if offering a single % for the entire category -->				Minimum Discount % Off	Extended Price
3 GENERATORS	Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price			
	N/A				\$	-
					\$	-
					\$	-
					\$	-
	[insert additional lines as necessary]				\$	-

Category #					<u>Offered</u> <u>Minimum</u> <u>Discount %</u>	
					<u>Off</u>	
					N/A	
	Hard type value <u>ONLY</u> if offering a single % for the entire category -->				Minimum Discount % Off	Extended Price
4 FORKLIFTS	Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price			
	N/A				\$	-
					\$	-
					\$	-
					\$	-
	[insert additional lines as necessary]				\$	-

Category #					<u>Offered</u> <u>Minimum</u> <u>Discount %</u>	
					<u>Off</u>	
					N/A	
	Hard type value <u>ONLY</u> if offering a single % for the entire category -->				Minimum Discount % Off	Extended Price
5 LIGHT TOWERS	Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price			
	N/A				\$	-
					\$	-

				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

Offered
Minimum
Discount %
Off

Category #

6 **OTHER (IN SCOPE)**

Hard type value **ONLY** if offering a single % for the entire category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

Offered
Minimum
Discount %
Off

Category #

7 **OTHER (IN SCOPE)**

Hard type value **ONLY** if offering a single % for the entire category -->

N/A

Brand Name	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Minimum Discount % Off	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

Attachment I
COST PROPOSAL
Section 3 - Discount % Off Evaluation
Industrial Equipment Value Add Cost Evaluation and Contract Offering

ADDITIONAL INSTRUCTION:

1. Within the tables, list the value add products / services you intend to provide under the resulting contract award. If you need more space, insert additional lines as necessary. Light blue highlighted cells signify a requested vendor input.

Value Add Cost

Category #

1 AIR COMPRESSORS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

2 BACK UP BATTERY PACKS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

3 GENERATORS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

4 FORKLIFTS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

5 LIGHT TOWERS

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

6 OTHER (IN SCOPE)

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -

7 OTHER (IN SCOPE)

Brand Name / Service / Product Description	Price Book/Catalog Date of Manufacturer's Current Published Retail Price List	List Price	Discount %	Extended Price
N/A				\$ -
				\$ -
				\$ -
				\$ -
[insert additional lines as necessary]				\$ -



REQUEST FOR PROPOSALS FOR HEAVY CONSTRUCTION AND INDUSTRIAL EQUIPMENT

Issued by the **State of Oklahoma**
Solicitation Number OK-MA-192-23,

ATTACHMENT L VALUE ADDED PLAN

This template must be used. The Value-Added Plan should identify any value-added options or ideas that may benefit the States. The value-added claims should be prioritized (identify the most important claims first). The Offeror may add or delete Value Added Claim table templates, but do not exceed the 2-page limit for this section. Do NOT include any identifying information in the Plan. Information listed under the "Documented Performance" line may describe where the Respondent has used the approach or solution previously, and what the results were in terms of verifiable metrics.

The example instructional language provided below can be deleted to accommodate more claims

Example:

Item Claim:	<i>This would be the place to offer services / packages / optional remittance methods, etc. not specifically requested in the solicitation. Based on the requested scope what additional related, value add options / services would you like to offer?</i>		
How will this add value?:	<i>How would the item / service described above add value to the State's awarded contract?</i>		
Documented Performance:	<i>State in general terms (performance metrics) the historical results of other public entities utilizing this value add.</i>		
Cost Impact (%)	<i>What % impact on cost will this time / service have?</i>	Schedule Impact (%)	<i>What % impact on the schedule (rollout, implementation, maintenance, etc.) will this time / service have?</i>

Item Claim #1:

Item Claim:	<i>We will offer a volume discount to customers with multiple machines within one purchase. This only applies to the pieces of equipment we have on contract.</i>		
How will this add value?:	<i>It provides additional discounts for customers.</i>		
Documented Performance:	<i>The sales at a higher discount will be reported on the quarterly sales report. This will be an additional line item on the quote to the customer showing the higher discount. Volume discount table will be on the discount schedule submitted with this contract.</i>		
Cost Impact (%)	<i>Example: Purchasing 5 pieces of construction equipment on one PO will result in an additional 1% discount.</i>	Schedule Impact (%)	N/A

Item Claim #2:

Item Claim:	<i>Many of our products submitted on this contract contain 2D and 3D GradeControl technologies that are available as an option when configuring a machine. Examples are motor graders and crawler dozers. These are not available for purchase separately, these are only available as options when configuring the machine as a whole good purchase.</i>		
How will this add value?:	<i>Increased productivity for customers requiring less overall pieces of equipment.</i>		
Documented Performance:	<i>Take rate of these technologies in both the commercial and governmental space has increased over the last 5 years.</i>		
Cost Impact (%)	N/A	Schedule Impact (%)	N/A

John Deere Master Agreement

Final Audit Report

2023-08-29

Created:	2023-08-24
By:	Lisa Bradley (lisa.bradley@omes.ok.gov)
Status:	Signed
Transaction ID:	CBJCHBCAABAAAnSMAAnGPsmR3saKrxOG7-T2VfnmRGHLdq

"John Deere Master Agreement" History

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1. Definitions

The following definitions apply to this Contract:

a. Business Day

A day of the week recognized by the Client Agency as a workday, exclusive of Saturdays, Sundays and any State or federal holiday.

b. Claims

All actions, suits, claims, demands, investigations, and proceedings of any kind, open, pending, or threatened, whether mature, un-matured, contingent, known or unknown, at law or in equity in any forum.

c. Confidential Information

Any name, number or other information that may be used, alone or in conjunction with any other information, to identify a specific individual including, but not limited to, such individual's name, date of birth, mother's maiden name, motor vehicle operator's license number and residential address, Social Security number, employee identification number, employer or taxpayer identification number, alien registration number, government passport number, health insurance identification number, demand deposit account number, savings account number, credit card number, debit card number or unique biometric data such as fingerprint, voice print, retina or iris image, or other unique physical representation. Without limiting the foregoing, Confidential Information shall also include any information that DAS classifies as "confidential" or "restricted." Confidential Information shall not include information that may be lawfully obtained from publicly available sources or from federal, state, or local government records which are lawfully made available to the general public.

d. Confidential Information Breach

Generally, an instance where an unauthorized person or entity accesses Confidential Information in any manner, including but not limited to the following occurrences: (1) any Confidential Information that is not encrypted or protected is misplaced, lost, stolen or in any way compromised; (2) one or more third parties have had access to or taken control or possession of any Confidential Information that is not encrypted or protected without prior written authorization from the State; (3) the unauthorized acquisition of encrypted or protected Confidential Information together with the confidential process or key that is capable of compromising the integrity of the Confidential Information; or (4) if there is a substantial risk of identity theft or fraud to the Client Agency, the Contractor, or State.

e. Contractor Parties

Contractor's Partners, members, principals, directors, officers, shareholders, managers, representatives, agents, servants, consultants, employees or any one of them or any other person or entity with whom the Contractor is in privity or with whom Contractor contracts to Perform under this Contract in any capacity.

f. Deliverable

Each (1) Good, Service, or fulfillment of Performance; and (2) warranty of a Deliverable(s) that is listed in the Pricing Schedule or provided by Contractor as an element of Contractor's overall approach and solution to the requirements of this Contract. Any one of them or a

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combination of any of them may be developed or produced by Contractor or by a third party as a supplier or subcontractor to Contractor.

g. Effective Date

The date that the Connecticut Attorney General's Office approves this Contract, as evidenced by its signature.

h. Goods or Services

Goods, Services or both, as specified in this Contract.

i. Perform

All acts and things of the Contractor and Contractor Parties, severally and collectively, that are necessary or appropriate to fulfill or accomplish this Contract fully, including the Deliverables and all other Contract obligations. The word "Perform" includes all parts of speech.

j. Purchase Order

A written or electronic document that the Client Agency issues for one or more Deliverables in accordance with the terms of this Contract.

k. Records

All working papers and such other information and materials furnished or prepared by the Contractor in Performing including but not limited to, documents, data, plans, books, computations, drawings, specifications, notes, reports, records, estimates, summaries, memoranda and correspondence, kept or stored in any form.

l. Services

The labor or work, necessary or appropriate for the Contractor to Perform.

m. State

The State of Connecticut, including DAS, the Client Agency and any office, department, board, council, commission, institution or other agency of the State.

n. Statement of Work ("SOW")

Statement issued in connection with a Purchase Order for a Deliverable available under this Contract which sets forth all work and payment requirements for Contractor's Performance in connection with said Purchase Order.

o. Term

The original term of this Contract plus any extensions exercised under this Contract.

p. Termination

An end to this Contract prior to the end of its Term.

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2.1 Whistleblower Provision

This Contract may be subject to the provisions of Section 4-61dd of the Connecticut General Statutes. In accordance with this statute, if an officer, employee or appointing authority of the Contractor takes or threatens to take any personnel action against any employee of the Contractor in retaliation for such employee's disclosure of information to any employee of the contracting state or quasi-public agency or the Auditors of Public Accounts or the Attorney General under the provisions of such statute, Contractor shall be liable for a civil penalty of not more than five thousand dollars for each offense, up to a maximum of twenty percent of the value of this Contract. Each violation shall be a separate and distinct offense and in the case of a continuing violation, each calendar day's continuance of the violation shall be deemed to be a separate and distinct offense. The State may request that the Attorney General bring a civil action in the Superior Court for the Judicial District of Hartford to seek imposition and recovery of such civil penalty. In accordance with such statute, each large state contractor, as defined in the statute, shall post a notice of the provisions of the statute relating to large state contractors in a conspicuous place which is readily available for viewing by the employees of the Contractor.

2.2 Forum and Choice of Law

The parties deem this Contract to have been made in the City of Hartford, State of Connecticut. Both parties agree that it is fair and reasonable for the validity and construction of this Contract to be, and it shall be, governed by the laws and court decisions of the State of Connecticut, without giving effect to its principles of conflicts of laws. To the extent that any immunities provided by Federal law or the laws of the State of Connecticut do not bar an action against the State, and to the extent that these courts are courts of competent jurisdiction, for the purpose of venue, the complaint shall be made returnable to the Judicial District of Hartford only or shall be brought in the United States District Court for the District of Connecticut only, and shall not be transferred to any other court, provided, however, that nothing here constitutes a waiver or compromise of the sovereign immunity of the State of Connecticut. The Contractor waives any objection which it may now have or will have to the laying of venue of any Claims in any forum and further irrevocably submits to such jurisdiction in any suit, action or proceeding.

2.3 Sovereign Immunity

The parties acknowledge and agree that nothing in this Contract shall be construed as a modification, compromise or waiver by the State of any rights or defenses of any immunities provided by federal law or the laws of the State of Connecticut to the State or any of its officers and employees, which they may have had, now have or will have with respect to all matters arising out of this Contract. To the extent that this Section conflicts with any other Section, this Section shall govern.

2.4 Summary of State Ethics Laws

Pursuant to the requirements of section 1-101qq of the Connecticut General Statutes (a) the State has provided to the Contractor the summary of State ethics laws developed by the State Ethics Commission pursuant to section 1-81b of the Connecticut General Statutes, which summary is incorporated by reference into and made a part of this Contract as if the summary had been fully set forth in this Contract; (b) the Contractor represents that the chief executive officer or authorized signatory of the Contract and all key employees of such officer or signatory have read and understood the summary and agree to comply with the provisions of state ethics law; (c) prior to entering into a contract with any subcontractors or consultants, the Contractor shall provide the summary to all subcontractors and consultants and each such contract entered into with a subcontractor or consultant on or after July 1, 2021, shall

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include a representation that each subcontractor or consultant and the key employees of such subcontractor or consultant have read and understood the summary and agree to comply with the provisions of state ethics law; (d) failure to include such representations in such contracts with subcontractors or consultants shall be cause for Termination of the Contract; and (e) each contract with such contractor, subcontractor or consultant shall incorporate such summary by reference as a part of the contract terms.

2.5 Campaign Contribution Restriction

For all State contracts, defined in section 9-612 of the Connecticut General Statutes as having a value in a calendar year of \$50,000 or more, or a combination or series of such agreements or contracts having a value of \$100,000 or more, the authorized signatory to this Contract represents that they have received the State Elections Enforcement Commission's notice advising state contractors of state campaign contribution and solicitation prohibitions, and will inform its principals of the contents of the notice.

2.6 Executive Orders and Other Enactments

- a. All references in this Contract to any Federal, State, or local law, statute, public or special act, executive order, ordinance, regulation or code (collectively, "Enactments") shall mean Enactments that apply to the Contract at any time during its term, or that may be made applicable to the Contract during its Term. This Contract shall always be read and interpreted in accordance with the latest applicable wording and requirements of the Enactments. Unless otherwise provided by Enactments, the Contractor is not relieved of its obligation to Perform under this Contract if it chooses to contest the applicability of the Enactments or the State's authority to require compliance with the Enactments.
- b. This Contract is subject to the provisions of Executive Order No. Three of Governor Thomas J. Meskill, promulgated June 16, 1971, concerning labor employment practices, Executive Order No. Seventeen of Governor Thomas J. Meskill, promulgated February 15, 1973, concerning the listing of employment openings and Executive Order No. Sixteen of Governor John G. Rowland promulgated August 4, 1999, concerning violence in the workplace, all of which are incorporated into and are made a part of this Contract as if they had been fully set forth in it.
- c. This Contract may be subject to (1) Executive Order No. 14 of Governor M. Jodi Rell, promulgated April 17, 2006, concerning procurement of cleaning products and services; and (2) Executive Order No. 61 of Governor Dannel P. Malloy promulgated December 13, 2017 concerning the Policy for the Management of State Information Technology Projects, as issued by the Office of Policy and Management, Policy ID IT-SDLC-17-04. If any of the Executive Orders referenced in this subsection is applicable, it is deemed to be incorporated into and made a part of this Contract as if fully set forth in it.

2.7 Nondiscrimination

- a. For purposes of this Section, the following terms are defined as follows:
 1. "Commission" means the Commission on Human Rights and Opportunities;
 2. "Contract" and "contract" include any extension or modification of the Contract or contract;
 3. "Contractor" and "contractor" include any successors or assigns of the Contractor or contractor;

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4. "Gender identity or expression" means a person's gender-related identity, appearance or behavior, whether or not that gender-related identity, appearance or behavior is different from that traditionally associated with the person's physiology or assigned sex at birth, which gender-related identity can be shown by providing evidence including, but not limited to, medical history, care or treatment of the gender-related identity, consistent and uniform assertion of the gender-related identity or any other evidence that the gender-related identity is sincerely held, part of a person's core identity or not being asserted for an improper purpose;
5. "good faith" means that degree of diligence which a reasonable person would exercise in the performance of legal duties and obligations;
6. "good faith efforts" shall include, but not be limited to, those reasonable initial efforts necessary to comply with statutory or regulatory requirements and additional or substituted efforts when it is determined that such initial efforts will not be sufficient to comply with such requirements;
7. "marital status" means being single, married as recognized by the state of Connecticut, widowed, separated or divorced;
8. "mental disability" means one or more mental disorders, as defined in the most recent edition of the American Psychiatric Association's "Diagnostic and Statistical Manual of Mental Disorders", or a record of or regarding a person as having one or more such disorders;
9. "minority business enterprise" means any small contractor or supplier of materials fifty-one percent or more of the capital stock, if any, or assets of which is owned by a person or persons: (1) who are active in the daily affairs of the enterprise, (2) who have the power to direct the management and policies of the enterprise, and (3) who are members of a minority, as such term is defined in subsection (a) of Connecticut General Statutes § 32-9n; and
10. "public works contract" means any agreement between any individual, firm or corporation and the State or any political subdivision of the State other than a municipality for construction, rehabilitation, conversion, extension, demolition or repair of a public building, highway or other changes or improvements in real property, or which is financed in whole or in part by the State, including, but not limited to, matching expenditures, grants, loans, insurance or guarantees.

For purposes of this Section, the terms "Contract" and "contract" do not include a contract where each contractor is (1) a political subdivision of the state, including, but not limited to, a municipality, unless the contract is a municipal public works contract or quasi-public agency project contract, (2) any other state, including but not limited to any federally recognized Indian tribal governments, as defined in C.G.S. § 1-267, (3) the federal government, (4) a foreign government, or (5) an agency of a subdivision, state or government described in the immediately preceding enumerated items (1), (2), (3), or (4).

- b. (1) The Contractor agrees and warrants that in the performance of the Contract such Contractor will not discriminate or permit discrimination against any person or group of persons on the grounds of race, color, religious creed, age, marital status, national origin, ancestry, sex, gender identity or expression, status as a veteran, intellectual disability, mental disability or physical disability, including, but not limited to, blindness, unless it is shown by such Contractor that such disability prevents performance of the work involved, in any manner prohibited by the laws of the United States or of the State of Connecticut; and the Contractor further agrees to take affirmative action to ensure that applicants with job-related qualifications are employed and that employees are treated when employed

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without regard to their race, color, religious creed, age, marital status, national origin, ancestry, sex, gender identity or expression, status as a veteran, intellectual disability, mental disability or physical disability, including, but not limited to, blindness, unless it is shown by the Contractor that such disability prevents performance of the work involved; (2) the Contractor agrees, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, to state that it is an "affirmative action equal opportunity employer" in accordance with regulations adopted by the Commission; (3) the Contractor agrees to provide each labor union or representative of workers with which the Contractor has a collective bargaining Agreement or other contract or understanding and each vendor with which the Contractor has a contract or understanding, a notice to be provided by the Commission, advising the labor union or workers' representative of the Contractor's commitments under this section and to post copies of the notice in conspicuous places available to employees and applicants for employment; (4) the Contractor agrees to comply with each provision of this Section and Connecticut General Statutes §§ 46a-68e and 46a-68f and with each regulation or relevant order issued by said Commission pursuant to Connecticut General Statutes §§ 46a-56, 46a-68e and 46a-68f; and (5) the Contractor agrees to provide the Commission on Human Rights and Opportunities with such information requested by the Commission, and permit access to pertinent books, records and accounts, concerning the employment practices and procedures of the Contractor as relate to the provisions of this Section and Connecticut General Statutes § 46a-56. If the contract is a public works contract, the Contractor agrees and warrants that he will make good faith efforts to employ minority business enterprises as subcontractors and suppliers of materials on such public works projects.

- c. Determination of the Contractor's good faith efforts shall include, but shall not be limited to, the following factors: The Contractor's employment and subcontracting policies, patterns and practices; affirmative advertising, recruitment and training; technical assistance activities and such other reasonable activities or efforts as the Commission may prescribe that are designed to ensure the participation of minority business enterprises in public works projects.
- d. The Contractor shall develop and maintain adequate documentation, in a manner prescribed by the Commission, of its good faith efforts.
- e. The Contractor shall include the provisions of subsection (b) of this Section in every subcontract or purchase order entered into in order to fulfill any obligation of a contract with the State and such provisions shall be binding on a subcontractor, vendor or manufacturer unless exempted by regulations or orders of the Commission. The Contractor shall take such action with respect to any such subcontract or purchase order as the Commission may direct as a means of enforcing such provisions including sanctions for noncompliance in accordance with Connecticut General Statutes §46a-56; provided if such Contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the Commission, the Contractor may request the State of Connecticut to enter into any such litigation or negotiation prior thereto to protect the interests of the State and the State may so enter.
- f. The Contractor agrees to comply with the regulations referred to in this Section as they exist on the date of this Contract and as they may be adopted or amended from time to time during the term of this Contract and any amendments thereto.
- g. (1) The Contractor agrees and warrants that in the performance of the Contract such Contractor will not discriminate or permit discrimination against any person or group of persons on the grounds of sexual orientation, in any manner prohibited by the laws of the United States or the State of Connecticut, and that employees are treated when employed without regard to their sexual orientation; (2) the Contractor agrees to provide each labor union or representative of workers with which such Contractor has a collective

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bargaining Agreement or other contract or understanding and each vendor with which such Contractor has a contract or understanding, a notice to be provided by the Commission on Human Rights and Opportunities advising the labor union or workers' representative of the Contractor's commitments under this section, and to post copies of the notice in conspicuous places available to employees and applicants for employment; (3) the Contractor agrees to comply with each provision of this section and with each regulation or relevant order issued by said Commission pursuant to Connecticut General Statutes § 46a-56; and (4) the Contractor agrees to provide the Commission on Human Rights and Opportunities with such information requested by the Commission, and permit access to pertinent books, records and accounts, concerning the employment practices and procedures of the Contractor which relate to the provisions of this Section and Connecticut General Statutes § 46a-56.

- h. The Contractor shall include the provisions of the foregoing paragraph in every subcontract or purchase order entered into in order to fulfill any obligation of a contract with the State and such provisions shall be binding on a subcontractor, vendor or manufacturer unless exempted by regulations or orders of the Commission. The Contractor shall take such action with respect to any such subcontract or purchase order as the Commission may direct as a means of enforcing such provisions including sanctions for noncompliance in accordance with Connecticut General Statutes § 46a-56; provided, if such Contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the Commission, the Contractor may request the State of Connecticut to enter into any such litigation or negotiation prior thereto to protect the interests of the State and the State may so enter.
- i. Pursuant to subsection (c) of section 4a-60 and subsection (b) of section 4a-60a of the Connecticut General Statutes, the Contractor, for itself and its authorized signatory of this Contract, affirms that it understands the obligations of this section and that it will maintain a policy for the duration of the Contract to assure that the Contract will be performed in compliance with the nondiscrimination requirements of such sections. The Contractor and its authorized signatory of this Contract demonstrate their understanding of this obligation by (A) having provided an affirmative response in the required online bid or response to a proposal question which asks if the contractor understands its obligations under such sections, (B) signing this Contract, or (C) initialing this nondiscrimination affirmation in the following box:

2.8 Indemnification

- a. Contractor shall indemnify, defend and hold harmless the State and its officers, representatives, agents, servants, employees, successors and assigns from and against any and all (1) Claims arising, directly or indirectly, in connection with this Contract for the acts of commission or omission (collectively, the "Acts") of the Contractor or Contractor Parties; and (2) liabilities, damages, losses, costs and expenses, including but not limited to, attorneys' and other professionals' fees, arising, directly or indirectly, in connection with Claims, Acts or this Contract. Contractor shall use counsel reasonably acceptable to the State in carrying out its obligations under this Section. Contractor's obligations under this Section to indemnify, defend and hold harmless against Claims includes Claims concerning confidentiality of any part of or all of the Contractor's bid, proposal or any Records, any intellectual property rights, other proprietary rights of any person or entity, copyrighted or non-copyrighted compositions, secret processes, patented or unpatented inventions, articles or appliances furnished or used in the Performance.
- b. Contractor shall not be responsible for indemnifying, defending or holding the State harmless from any liability arising due to the negligence of the State or any third party acting under the direct control or supervision of the State.

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- c. Contractor shall reimburse the State for any and all damages to the real or personal property of the State caused by the Acts of Contractor or any Contractor Parties. The State shall give Contractor reasonable notice of any such Claims.
- d. Contractor's duties under this Section shall remain fully in effect and binding in accordance with the terms of this Contract, without being lessened or compromised in any way, even where the Contractor is alleged or is found to have merely contributed in part to the Acts giving rise to the Claims or where the State is alleged or is found to have contributed to the Acts giving rise to the Claims or both.
- e. Contractor shall carry and maintain at all times during the Term of this Contract, and during the time that any provisions survive the Term of this Contract, sufficient commercial general liability insurance to satisfy its obligations under this Contract.
- f. This Section shall survive the Termination of this Contract and shall not be limited by reason of any insurance coverage.

2.9 Tangible Personal Property

- a. Contractor on its behalf and on behalf of its Affiliates, as defined below, shall comply with the provisions of Conn. Gen. Stat. §12-411b, as follows:
 - 1. For the Term, Contractor and its Affiliates shall collect and remit to the State of Connecticut, Department of Revenue Services, any Connecticut use tax due under the provisions of Chapter 219 of the Connecticut General Statutes for items of tangible personal property sold by the Contractor or by any of its Affiliates in the same manner as if the Contractor and such Affiliates were engaged in the business of selling tangible personal property for use in Connecticut and had sufficient nexus with the State under the provisions of Chapter 219 to be required to collect Connecticut use tax;
 - 2. A customer's payment of a use tax to the Contractor or its Affiliates relieves the customer of liability for the use tax;
 - 3. Contractor and its Affiliates shall remit all use taxes they collect from customers on or before the due date specified in this Contract if any, which may not be later than the last day of the month next succeeding the end of a calendar quarter or other tax collection period during which the tax was collected;
 - 4. Contractor and its Affiliates are not liable for use tax billed by them but not paid to them by a customer; and
 - 5. Any Contractor or Affiliate who fails to remit use taxes collected on behalf of its customers by the due date specified in this Contract shall be subject to the interest and penalties provided for persons required to collect sales tax under Chapter 219 of the Connecticut General Statutes.
- b. For purposes of this Section of this Contract, the word "Affiliate" means any person, as defined in section 12-1 of the Connecticut General Statutes, that controls is controlled by, or is under common control with another person. A person controls another person if the person owns, directly or indirectly, more than ten per cent of the voting securities of the other person. The term "voting security" means a security that confers upon the holder the right to vote for the election of members of the board of directors or similar governing body of the business, or that is convertible into, or entitles the holder to receive, upon its exercise, a security that confers such a right to vote. "Voting security" includes a general

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partnership interest.

- c. Contractor represents and warrants that each of its Affiliates has vested in the Contractor plenary authority to so bind the Affiliates in any agreement with the State of Connecticut. Contractor on its own behalf and on behalf of its Affiliates shall also provide, no later than 30 days after receiving a request by the State's contracting authority, such information as the State may require to ensure, in the State's sole determination, compliance with the provisions of Chapter 219 of the Connecticut General Statutes, including, but not limited to, §12-411b.

2.10 Representations and Warranties Regarding Motor Vehicles

If in the course of Performance or in any other way related to this Contract the Contractor at any time uses or operates "motor vehicles," as that term is defined by Conn. Gen. Stat. §14-1 (including, but not limited to such services as snow plowing, sanding, hauling or delivery of materials, freight or merchandise, or the transportation of passengers), the Contractor, represents and warrants for itself and the Contractor Parties, that:

- a. it is the owner of record or lessee of record of each such motor vehicle used in the Performance of this Contract, and each such motor vehicle is duly registered with the Connecticut Department of Motor Vehicles ("ConnDMV") in accordance with the provisions of Chapter 246 of the Connecticut General Statutes. Each such registration shall be in valid status, and shall not be expired, suspended or revoked by ConnDMV, for any reason or cause. If such motor vehicle is not registered with ConnDMV, then it shall be duly registered with another state or commonwealth in accordance with such other state's or commonwealth's applicable statutes. Each such registration shall be in valid status, and shall not be expired, suspended or revoked by such other state or commonwealth for any reason or cause.
- b. each such motor vehicle shall be fully insured in accordance with the provisions of Sections 14-12b, 14-112 and 38a-371 of the Connecticut General Statutes, as amended, in the amounts required by the said sections or in such higher amounts as have been specified by ConnDMV as a condition for the award of this Contract, or in accordance with all substantially similar provisions imposed by the law of the jurisdiction where the motor vehicle is registered.
- c. each Contractor Party who uses or operates a motor vehicle at any time in the Performance of this Contract shall have and maintain a motor vehicle operator's license or commercial driver's license of the appropriate class for the motor vehicle being used or operated. Each such license shall bear the endorsement or endorsements required by the provisions of Section 14-36a of the Connecticut General Statutes, as amended, to operate such motor vehicle, or required by substantially similar provisions imposed by the law of another jurisdiction in which the operator is licensed to operate such motor vehicle. The license shall be in valid status, and shall not be expired, suspended or revoked by ConnDMV or such other jurisdiction for any reason or cause.
- d. each motor vehicle shall be in full compliance with all of the terms and conditions of all provisions of the Connecticut General Statutes and regulations, or those of the jurisdiction where the motor vehicle is registered, pertaining to the mechanical condition, equipment, marking and operation of motor vehicles of such type, class and weight, including, but not limited to, requirements for intrastate carriers with motor vehicles having a gross vehicle weight rating or gross combination weight rating or gross vehicle weight or gross combination weight of 18,001 pounds or more or interstate carriers with motor vehicles having a gross vehicle weight rating or gross combination weight rating or gross vehicle weight or gross combination weight of 10,001 pounds or more otherwise described by the provisions of Conn. Gen. Stat. § 14-163c(a) and all applicable provisions of the Federal Motor Carrier Safety Regulations, as set forth in Title 49, Parts 382 to 399, inclusive, of the Code of Federal

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Regulations. If the Contractor is a "motor carrier," as that term is defined in section 49 CFR Part 390, and the Contractor is subject to an order issued by the Federal Motor Carrier Safety Administration that prohibits such Contractor from operating or allowing the operation of a motor vehicle, then the Contractor shall comply fully with such order. In addition, if a motor vehicle or its operator is declared out of service pursuant to Conn. Gen. Stat. § 14-163c(d)(4), then the Contractor shall not operate or allow the operation of that motor vehicle and shall not allow the operator to operate a motor vehicle while the respective subject out-of-service order is in effect.

2.11 Audit and Inspection of Plants, Places of Business and Records

- a. The State and its agents, including, but not limited to, the Connecticut Auditors of Public Accounts, Attorney General and State's Attorney and their respective agents, may, at reasonable hours, inspect and examine all of the parts of the Contractor's and Contractor Parties' plants and places of business which, in any way, are related to, or involved in, the Performance of this Contract.
- b. Contractor shall maintain, and shall require each Contractor Party to maintain, accurate and complete Records. Contractor shall make all of its and the Contractor Parties' Records available at all reasonable hours for audit and inspection by the State and its agents.
- c. The State shall make all requests for any audit or inspection in writing and shall provide the Contractor with at least twenty- four (24) hours' notice prior to the requested audit and inspection date. If the State suspects fraud or other abuse, or in the event of an emergency, the State is not obligated to provide any prior notice.
- d. Contractor shall pay for all costs and expenses of any audit or inspection which reveals information that, in the sole determination of the State, is sufficient to constitute a Breach by the Contractor under this Contract. The Contractor will remit full payment to the State for such audit or inspection no later than 30 days after receiving an invoice from the State. If the State does not receive payment within such time, the State may setoff the amount from any moneys which the State would otherwise be obligated to pay the Contractor in accordance with this Contract.
- e. Contractor shall keep and preserve or cause to be kept and preserved all of its and Contractor Parties' Records until three (3) years after the latter of (1) final payment under this Contract, or (2) the expiration or earlier termination of this Contract, as the same may be modified for any reason. The State may request an audit or inspection at any time during this period. If any Claim or audit is started before the expiration of this period, the Contractor shall retain or cause to be retained all Records until all Claims or audit findings have been resolved.
- f. Contractor shall cooperate fully with the State and its agents in connection with an audit or inspection. Following any audit or inspection, the State may conduct and the Contractor shall cooperate with an exit conference.
- g. Contractor shall incorporate this entire Section verbatim into any contract or other agreement that it enters into with any Contractor Party.

2.12 Protection of Confidential Information

- a. Contractor and Contractor Parties have a duty to and shall, at their own expense, protect from a Confidential Information Breach any and all Confidential Information which they come to possess or control, wherever and however stored or maintained, in a commercially reasonable manner in accordance with the highest current industry

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standards and best practices, as they may be amended from time to time.

- b. Contractor and all Contractor Parties shall develop, implement and maintain a comprehensive written information security policy for the protection of Confidential Information that meets or exceeds current industry standards and best practices as they may be amended from time to time. The safeguards contained in the written information security policy must meet or exceed the standards for the protection of Confidential Information, and information of a similar character, as set forth in all applicable federal and State law and in written policy of the Client Agency or DAS concerning the confidentiality of Confidential Information. Such data-security program shall include, but not be limited to, the following:
 - 1. A security policy for employees related to the storage, access and transportation of data containing Confidential Information;
 - 2. Reasonable restrictions on access to records containing Confidential Information, including access to any locked storage where such records are kept and an auditable electronic system of logging and tracking the viewing, accessing or both of Confidential Information;
 - 3. A process for reviewing policies and security measures at least annually;
 - 4. Creating secure access controls to Confidential Information, including but not limited to passwords; and
 - 5. Encrypting of Confidential Information that is stored on laptops, portable devices and storage media or that is being transmitted electronically.
- c. Contractor and Contractor Parties shall notify DAS, the Client Agency and the Connecticut Office of the Attorney General as soon as practical, but no later than the next Business Day, after they become aware of or suspect that any Confidential Information which Contractor or Contractor Parties have come to possess or control has been subject to a Confidential Information Breach. If a Confidential Information Breach has occurred which, in the sole opinion of the Client Agency after consultation with the Attorney General, constitutes a breach of security as defined in Connecticut General Statutes, § 36a- 701b, or otherwise (Breach), the Contractor shall, within three (3) Business Days after the notification, present a credit monitoring and protection plan to the Commissioner of DAS, the Client Agency, and the Connecticut Office of the Attorney General, for review and approval. Such credit monitoring and protection plan shall be made available by the Contractor at its own cost and expense to all individuals affected by the Confidential Information Breach. Such credit monitoring or protection plan shall include, but is not limited to reimbursement for the cost of placing and lifting one (1) security freeze per credit file pursuant to Connecticut General Statutes § 36a-701a. Such credit monitoring or protection plans shall be approved by the State in accordance with this Section and shall cover a length of time commensurate with the circumstances of the Breach. Neither Contractor's nor any Contractor Party's costs and expenses for the credit monitoring and protection plan shall be recoverable from DAS, the Client Agency, or any State of Connecticut entity or any affected individuals and shall be outside of any liability cap or limitation contained in this Contract.
- d. Contractor shall incorporate the requirements of this Section in all subcontracts requiring each Contractor Party to safeguard Confidential Information in the same manner as provided for in this Section.
- e. Nothing in this Section shall supersede in any manner Contractor's or Contractor Party's obligations pursuant to the provisions of this Contract concerning the obligations of the

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Contractor to the Client Agency or DAS.

2.13 Disclosure of Records Concerning Governmental Functions

This Contract may be subject to the provisions of Section 1-218 of the Connecticut General Statutes. In accordance with this statute, each contract in excess of two million five hundred thousand dollars between a public agency and a person for the performance of a governmental function shall (a) provide that the public agency is entitled to receive a copy of records and files related to the performance of the governmental function, and (b) indicate that such records and files are subject to FOIA and may be disclosed by the public agency pursuant to FOIA. No request to inspect or copy such records or files shall be valid unless the request is made to the public agency in accordance with FOIA. Any complaint by a person who is denied the right to inspect or copy such records or files shall be brought to the Freedom of Information Commission in accordance with the provisions of Sections 1-205 and 1-206 of the Connecticut General Statutes.

2.14 Data: Access

a. Access to Contract and State Data.

The Contractor shall provide to the Client Agency access to any data, as defined in Conn. Gen Stat. Sec. 4e-1, concerning the Contract and the Client Agency that are in the possession or control of the Contractor upon demand and shall provide the data to the Client Agency in a format prescribed by the Client Agency and the State Auditors of Public Accounts at no additional cost.

2.15 Iran Energy Investment Certification

- a. Pursuant to Conn. Gen. Stat. § 4-252a, the Contractor certifies that it has not made a direct investment of twenty million dollars or more in the energy sector of Iran on or after October 1, 2013, as described in Section 202 of the Comprehensive Iran Sanctions, Accountability and Divestment Act of 2010, and has not increased or renewed such investment on or after said date.
- b. If the Contractor makes a good faith effort to determine whether it has made an investment described in subsection (a) of this Section then the Contractor shall not be deemed to be in breach of the Contract or in violation of this Section. A "good faith effort" for purposes of this subsection includes a determination that the Contractor is not on the list of persons who engage in certain investment activities in Iran created by the Department of General Services of the state of California pursuant to Division 2, Chapter 2.7 of the California Public Contract Code. Nothing in this subsection shall be construed to impair the ability of the State or quasi-public agency to pursue a breach of contract action for any violation of the provisions of the Contract.

2.16 Large State Contract Representation for Contractor

Pursuant to Conn. Gen. Stat. § 4-252 and Acting Governor Susan Bysiewicz Executive Order No. 21-2, promulgated July 1, 2021, the Contractor, for itself and on behalf of all of its principals or key personnel who submitted a bid or proposal, represents:

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- a. That no gifts were made by (A) the Contractor, (B) any principals and key personnel of the Contractor, who participate substantially in preparing bids, proposals or negotiating State contracts, or (C) any agent of the Contractor or principals and key personnel, who participates substantially in preparing bids, proposals or negotiating State contracts, to (i) any public official or State employee of the State agency or quasi- public agency soliciting bids or proposals for State contracts, who participates substantially in the preparation of bid solicitations or requests for proposals for State contracts or the negotiation or award of State contracts, or (ii) any public official or State employee of any other State agency, who has supervisory or appointing authority over such State agency or quasi-public agency;
- b. That no such principals and key personnel of the Contractor, or agent of the Contractor or of such principals and key personnel, knows of any action by the Contractor to circumvent such prohibition on gifts by providing for any other principals and key personnel, official, employee or agent of the Contractor to provide a gift to any such public official or State employee; and
- c. That the Contractor is submitting bids or proposals without fraud or collusion with any person.

2.17 Large State Contract Representation for Official or Employee of State Agency

Pursuant to Conn. Gen. Stat. § 4-252 and Acting Governor Susan Bysiewicz Executive Order No. 21-2, promulgated July 1, 2021, the State official or employee represents that the selection of the person, firm or corporation was not the result of collusion, the giving of a gift or the promise of a gift, compensation, fraud or inappropriate influence from any person.

2.18 Termination

- a. Notwithstanding any provisions in this Contract, DAS, through a duly authorized employee, may Terminate this Contract upon thirty (30) days written notice whenever DAS makes a written determination that such Termination is in the best interests of the State. DAS shall notify the Contractor in writing of Termination pursuant to this Section, which notice shall specify the effective date of Termination and the extent to which the Contractor must complete its Performance under this Contract prior to such date.
- b. Notwithstanding any provisions in this Contract, either party, through a duly authorized employee, may, after making a written determination that the other party has breached this Contract and has failed to remedy the breach, Terminate this Contract in accordance with Section 14.8 (Defaults and Remedies) on page 23 of Exhibit 1.
- c. Notices of Termination must be sent certified to the appropriate party listed in Section 12 of this Participating Addendum. Upon receiving the Termination notice from DAS, the Contractor shall immediately modify or discontinue all Performance affected in accordance with the terms of the notice, undertake commercially reasonable efforts to mitigate any losses or damages and deliver to DAS or the Client Agency (as directed in the notice) all Records. The Records are deemed to be the property of the State and the Contractor shall deliver them to DAS or the Client Agency (as directed in the notice) no later than thirty (30) days after the Termination of this Contract or fifteen (15) days after the Contractor receives a written request from DAS for the Records. The Contractor shall deliver those Records that exist in electronic, magnetic or other intangible form in a non-proprietary format, such as, but not limited to, ASCII or .TXT.

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- d. Except for any work which DAS directs the Contractor to Perform in the notice prior to the effective date of Termination, and except as otherwise provided in the notice, the Contractor shall terminate or conclude all existing subcontracts and Purchase Orders and shall not enter into any further subcontracts, Purchase Orders or commitments.
- e. The Client Agency shall, within forty-five (45) days of the effective date of Termination, reimburse the Contractor for its Performance rendered and accepted by the Client Agency in accordance with this Contract, in addition to all actual and reasonable costs incurred after Termination in completing those portions of the Performance which the notice required the Contractor to complete. However, the Contractor is not entitled to receive and the Client Agency will not tender to the Contractor any payments for anticipated or lost profits. Upon request by the Client Agency, the Contractor shall assign to the Client Agency, or any replacement contractor which the Client Agency designates, all subcontracts, Purchase Orders and other commitments, deliver to the Client Agency all Records and other information pertaining to its Performance, and remove from State premises, whether leased or owned, all of Contractor's property, equipment, waste material and rubbish related to its Performance, all as DAS or the Client Agency (as directed in the notice) may request.
- f. Upon Termination of this Contract, all rights and obligations shall be null and void, so that no party shall have any further rights or obligations to any other party, except with respect to the Sections which survive Termination. All representations, warranties, agreements and rights of the parties under this Contract shall survive such Termination to the extent not otherwise limited in this Contract and without each one of them having to be specifically mentioned in this Contract.
- g. Termination of this Contract pursuant to this Section shall not be deemed to be a breach or default of this Contract by DAS or the Client Agency.

2.19 Contractor Partners/Assignment

The Contractor has entered into contractual arrangements with all subcontractors, dealers, distributors, resellers, and other partners identified on Contractor's NASPO ValuePoint webpage ("Contractor Partners") obligating them to provide Goods and Services to a Participating Entity that may request Goods and Services under a participating addendum such as this Participating Addendum. Contractor shall ensure that the participation of Contractor Partners is in accordance with the terms of the Master Agreement and this Participating Addendum. The Client Agency may purchase only from the Contractor or Contractor Partners listed in Exhibit 3, Price Schedule.

Except for Contractor's right to allow Contractor Partners to provide Goods and Services under this Contract, the Contractor shall not otherwise assign any of its rights or obligations under this Contract, voluntarily or otherwise, in any manner without the prior written consent of DAS. DAS may void any purported assignment in violation of this Section and declare the Contractor in breach of Contract. Any Termination by DAS for a breach is without prejudice to DAS' or the State's rights or possible Claims.

2.20 Repair Parts and Service Work

The Contractor represents and warrants that the Partners identified in Exhibit 3, Price Schedule shall provide service and replace and/or repair parts in-shop and in the field to

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existing Client Agency equipment as well as Deliverables being serviced or repaired outside of the warranty period in accordance with the hourly labor rates and percent discount for replacement parts set forth in Exhibit 3, Price Schedule. Field repairs shall only be performed on Deliverables located in Connecticut.

2.21 Equipment Trade-in Program

The Client Agency may agree with the Contractor or Contractor Partners, or both, to trade-in equipment in exchange for similar equipment. The value of equipment for trade will be based on the fair market value for similar age, condition and model equipment located within a one hundred fifty (150) mile radius of the address shown on the Purchase Order. The Client Agency may deliver the traded equipment to the designated Contractor or Contractor Partner site located in Connecticut only after the new equipment has been delivered to and accepted by Client Agency. The Contractor and Client Agency may agree to alternate means of delivery for the traded equipment. The established trade-in amount must be set forth in the Purchase Order for new equipment and such amount must offset the purchase of the new equipment.

2.22 Standardization

The Contractor shall provide the following information, in addition to a specification sheet listing the standard and optional features for each serial numbered piece of equipment, upon delivery of the Deliverables to Client Agency:

- One (1) operator manuals for each piece of equipment
- Certificate of origin completed as follows:

Name of purchaser

Address of purchaser

Signature of authorized representative of Contractor

2.23 Delivery

The Contractor shall perform pre-delivery operations, as recommended by the manufacturer. All Deliverables must be ready to be placed into immediate service when received by Client Agency. The Contractor shall notify the Client Agency forty-eight (48) hours in advance of any scheduled delivery to allow for Client Agency's Acceptance inspection at the location shown on the Purchase Order. If equipment is found to be defective in material or workmanship or otherwise does not conform to the requirements of the Contract, the Client Agency shall have the right to either reject such equipment or require its repair or replacement. Inspection of the equipment shall include, but is not limited to, conformance of the equipment with specifications, the complete installation of any upfitting components, quality of workmanship, the general appearance of the interior and exterior, fluid levels, and the complete mechanical operation of the equipment.

2.24 Consumer Data Privacy and Online Monitoring

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Pursuant to section 4e-72a of the Connecticut General Statutes, Contractor shall at all times comply with all applicable provisions of sections 42-515 to 42-525, inclusive, of the Connecticut General Statutes, as the same may be revised or modified.

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2.25 Consulting Agreements Representation

Pursuant to Conn. Gen. Stat. § 4a-81, the person signing this Contract on behalf of the Contractor represents, to their best knowledge and belief and subject to the penalty of false statement as provided in Conn. Gen. Stat. § 53a-157b, that the Contractor has not entered into any consulting agreements in connection with this Contract, **except for the agreements listed below**. "Consulting agreement" means any written or oral agreement to retain the services, for a fee, of a consultant for the purposes of (A) providing counsel to a contractor, vendor, consultant or other entity seeking to conduct, or conducting, business with the State, (B) contacting, whether in writing or orally, any executive, judicial, or administrative office of the State, including any department, institution, bureau, board, commission, authority, official or employee for the purpose of solicitation, dispute resolution, introduction, requests for information, or (C) any other similar activity related to such contracts. "Consulting agreement" does not include any agreements entered into with a consultant who is registered under the provisions of chapter 10 of the Connecticut General Statutes as of the date such contract is executed in accordance with the provisions of Conn. Gen. Stat. §4a-81.

Consultant's Name and Title

Name of Firm (if applicable)

Start Date

End Date

Cost

The basic terms of the consulting agreement are:

Description of services provided:

Is the consultant a former State employee or former public official? ☐ YES ☐ NO

If YES:

Name of Former State Agency

Termination Date of Employment

Exhibit 3
Price Schedule

- A. The Client Agency shall issue Purchase Orders for the Deliverables in accordance with the minimum discount set forth in Attachment 1- Cost Proposal, beginning on page 53 of Exhibit 1.
- B. The Client agency shall issue Purchase Orders for parts and repairs of the equipment in accordance with the prices set forth in Table 1 and Table 2 shown below. Pricing listed in this Exhibit 3 shall remain unchanged for twelve (12) months following the Effective Date of this Participating Addendum. The Contractor may request a price adjustment only during the thirty (30) days immediately preceding the annual anniversary date of the Participating Addendum. The Contractor shall request approval in writing from DAS for any price adjustment for parts and repair of equipment and include an explanation of what has prompted the change as well as sufficient documentation to justify the price increase. The percent discount for parts is firm for the Term of the Contract. Any price adjustment requested for labor rates will be capped at no more than four (4) percent annually. No retroactive price adjustments are allowed under this Participating Addendum. Price adjustments will only be effective if approved by Client Agency and only after this Exhibit 3 is amended to reflect the new pricing.

Table 1: General Labor Rates & Parts Discounts

Description	Unit of Measure	Price
1. Shop Labor Rate	Per Hour	\$180.00
2. Field Labor Rate	Per Hour	\$220.00
3. Parts	Percent Discount	3% off of Current List Price

Table 2: Labor Rates & Parts Discounts for Agencies that have purchased 5+ new units from this contract

Description	Unit of Measure	Price
1. Shop Labor Rate	Per Hour	\$160.00
2. Field Labor Rate	Per Hour	\$189.00
3. Parts	Percent Discount	3% off of Current List Price

Contractor Partners are the following:

Dealer Name	Address	City, State	Phone	Labor/ Parts offered
United Ag & Turf	2A Gandolfo Drive	Canaan, CT	(860) 824-1161	Parts and Service
United Ag & Turf	119 S Main Street	East Windsor, CT	(860) 623-8296	Parts and Service
United Ag & Turf	242 Colt Highway	Farmington, CT	(860) 678-7288	Parts and Service
United Ag & Turf	20 Excalibur Blvd	Plainfield, CT	(860) 230-0130	Parts and Service
The W. I. Clark Company	17 Eagle Road	Danbury, CT	(203) 775-1203	Parts and Service
The W. I. Clark Company	80 Pratt Road	Plainfield, CT	(860) 546-4808	Parts and Service
The W. I. Clark Company	30 Barnes Industrial Road S	Wallingford, CT	(203) 265-6781	Parts Only