

**Solicitation Number: 011723****CONTRACT**

This Contract is between Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Gradall Industries, Inc., 406 Mill Ave. SW, New Philadelphia, OH 44663 (Supplier).

Sourcewell is a State of Minnesota local government unit and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that offers cooperative procurement solutions to government entities. Participation is open to eligible federal, state/province, and municipal governmental entities, higher education, K-12 education, nonprofit, tribal government, and other public entities located in the United States and Canada. Sourcewell issued a public solicitation for Heavy Construction Equipment with Related Attachments and Technology from which Supplier was awarded a contract.

Supplier desires to contract with Sourcewell to provide equipment, products, or services to Sourcewell and the entities that access Sourcewell's cooperative purchasing contracts (Participating Entities).

**1. TERM OF CONTRACT**

- A. **EFFECTIVE DATE.** This Contract is effective upon the date of the final signature below.
- B. **EXPIRATION DATE AND EXTENSION.** This Contract expires April 14, 2027, unless it is cancelled sooner pursuant to Article 22. This Contract may be extended one additional year upon the request of Sourcewell and written agreement by Supplier.
- C. **SURVIVAL OF TERMS.** Notwithstanding any expiration or termination of this Contract, all payment obligations incurred prior to expiration or termination will survive, as will the following: Articles 11 through 14 survive the expiration or cancellation of this Contract. All other rights will cease upon expiration or termination of this Contract.

**2. EQUIPMENT, PRODUCTS, OR SERVICES**

- A. **EQUIPMENT, PRODUCTS, OR SERVICES.** Supplier will provide the Equipment, Products, or Services as stated in its Proposal submitted under the Solicitation Number listed above.

Supplier's Equipment, Products, or Services Proposal (Proposal) is attached and incorporated into this Contract.

All Equipment and Products provided under this Contract must be new and the current model. Supplier may offer close-out or refurbished Equipment or Products if they are clearly indicated in Supplier's product and pricing list. Unless agreed to by the Participating Entities in advance, Equipment or Products must be delivered as operational to the Participating Entity's site.

This Contract offers an indefinite quantity of sales, and while substantial volume is anticipated, sales and sales volume are not guaranteed.

B. **WARRANTY.** Supplier warrants that all Equipment, Products, and Services furnished are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Equipment, Products, and Services are suitable for and will perform in accordance with the ordinary use for which they are intended. Supplier's dealers and distributors must agree to assist the Participating Entity in reaching a resolution in any dispute over warranty terms with the manufacturer. Any manufacturer's warranty that extends beyond the expiration of the Supplier's warranty will be passed on to the Participating Entity.

C. **DEALERS, DISTRIBUTORS, AND/OR RESELLERS.** Upon Contract execution and throughout the Contract term, Supplier must provide to Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers relative to the Equipment, Products, and Services offered under this Contract, which will be incorporated into this Contract by reference. It is the Supplier's responsibility to ensure Sourcewell receives the most current information.

### **3. PRICING**

All Equipment, Products, or Services under this Contract will be priced at or below the price stated in Supplier's Proposal.

When providing pricing quotes to Participating Entities, all pricing quoted must reflect a Participating Entity's total cost of acquisition. This means that the quoted cost is for delivered Equipment, Products, and Services that are operational for their intended purpose, and includes all costs to the Participating Entity's requested delivery location.

Regardless of the payment method chosen by the Participating Entity, the total cost associated with any purchase option of the Equipment, Products, or Services must always be disclosed in the pricing quote to the applicable Participating Entity at the time of purchase.

A. **SHIPPING AND SHIPPING COSTS.** All delivered Equipment and Products must be properly packaged. Damaged Equipment and Products may be rejected. If the damage is not readily apparent at the time of delivery, Supplier must permit the Equipment and Products to be

returned within a reasonable time at no cost to Sourcewell or its Participating Entities. Participating Entities reserve the right to inspect the Equipment and Products at a reasonable time after delivery where circumstances or conditions prevent effective inspection of the Equipment and Products at the time of delivery. In the event of the delivery of nonconforming Equipment and Products, the Participating Entity will notify the Supplier as soon as possible and the Supplier will replace nonconforming Equipment and Products with conforming Equipment and Products that are acceptable to the Participating Entity.

Supplier must arrange for and pay for the return shipment on Equipment and Products that arrive in a defective or inoperable condition.

Sourcewell may declare the Supplier in breach of this Contract if the Supplier intentionally delivers substandard or inferior Equipment or Products.

B. SALES TAX. Each Participating Entity is responsible for supplying the Supplier with valid tax-exemption certification(s). When ordering, a Participating Entity must indicate if it is a tax-exempt entity.

C. HOT LIST PRICING. At any time during this Contract, Supplier may offer a specific selection of Equipment, Products, or Services at discounts greater than those listed in the Contract. When Supplier determines it will offer Hot List Pricing, it must be submitted electronically to Sourcewell in a line-item format. Equipment, Products, or Services may be added or removed from the Hot List at any time through a Sourcewell Price and Product Change Form as defined in Article 4 below.

Hot List program and pricing may also be used to discount and liquidate close-out and discontinued Equipment and Products as long as those close-out and discontinued items are clearly identified as such. Current ordering process and administrative fees apply. Hot List Pricing must be published and made available to all Participating Entities.

#### **4. PRODUCT AND PRICING CHANGE REQUESTS**

Supplier may request Equipment, Product, or Service changes, additions, or deletions at any time. All requests must be made in writing by submitting a signed Sourcewell Price and Product Change Request Form to the assigned Sourcewell Supplier Development Administrator. This approved form is available from the assigned Sourcewell Supplier Development Administrator. At a minimum, the request must:

- Identify the applicable Sourcewell contract number;
- Clearly specify the requested change;
- Provide sufficient detail to justify the requested change;

- Individually list all Equipment, Products, or Services affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
- Include a complete restatement of pricing documentation in Microsoft Excel with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Equipment, Products, and Services offered, even for those items where pricing remains unchanged.

A fully executed Sourcewell Price and Product Request Form will become an amendment to this Contract and will be incorporated by reference.

## **5. PARTICIPATION, CONTRACT ACCESS, AND PARTICIPATING ENTITY REQUIREMENTS**

A. PARTICIPATION. Sourcewell's cooperative contracts are available and open to public and nonprofit entities across the United States and Canada; such as federal, state/province, municipal, K-12 and higher education, tribal government, and other public entities.

The benefits of this Contract should be available to all Participating Entities that can legally access the Equipment, Products, or Services under this Contract. A Participating Entity's authority to access this Contract is determined through its cooperative purchasing, interlocal, or joint powers laws. Any entity accessing benefits of this Contract will be considered a Service Member of Sourcewell during such time of access. Supplier understands that a Participating Entity's use of this Contract is at the Participating Entity's sole convenience and Participating Entities reserve the right to obtain like Equipment, Products, or Services from any other source.

Supplier is responsible for familiarizing its sales and service forces with Sourcewell contract use eligibility requirements and documentation and will encourage potential participating entities to join Sourcewell. Sourcewell reserves the right to add and remove Participating Entities to its roster during the term of this Contract.

B. PUBLIC FACILITIES. Supplier's employees may be required to perform work at government-owned facilities, including schools. Supplier's employees and agents must conduct themselves in a professional manner while on the premises, and in accordance with Participating Entity policies and procedures, and all applicable laws.

## **6. PARTICIPATING ENTITY USE AND PURCHASING**

A. ORDERS AND PAYMENT. To access the contracted Equipment, Products, or Services under this Contract, a Participating Entity must clearly indicate to Supplier that it intends to access this Contract; however, order flow and procedure will be developed jointly between Sourcewell and Supplier. Typically, a Participating Entity will issue an order directly to Supplier or its authorized subsidiary, distributor, dealer, or reseller. If a Participating Entity issues a purchase order, it may use its own forms, but the purchase order should clearly note the applicable Sourcewell

contract number. All Participating Entity orders under this Contract must be issued prior to expiration or cancellation of this Contract; however, Supplier performance, Participating Entity payment obligations, and any applicable warranty periods or other Supplier or Participating Entity obligations may extend beyond the term of this Contract.

Supplier's acceptable forms of payment are included in its attached Proposal. Participating Entities will be solely responsible for payment and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.

**B. ADDITIONAL TERMS AND CONDITIONS/PARTICIPATING ADDENDUM.** Additional terms and conditions to a purchase order, or other required transaction documentation, may be negotiated between a Participating Entity and Supplier, such as job or industry-specific requirements, legal requirements (e.g., affirmative action or immigration status requirements), or specific local policy requirements. Some Participating Entities may require the use of a Participating Addendum, the terms of which will be negotiated directly between the Participating Entity and the Supplier or its authorized dealers, distributors, or resellers, as applicable. Any negotiated additional terms and conditions must never be less favorable to the Participating Entity than what is contained in this Contract.

**C. SPECIALIZED SERVICE REQUIREMENTS.** In the event that the Participating Entity requires service or specialized performance requirements not addressed in this Contract (such as e-commerce specifications, specialized delivery requirements, or other specifications and requirements), the Participating Entity and the Supplier may enter into a separate, standalone agreement, apart from this Contract. Sourcewell, including its agents and employees, will not be made a party to a claim for breach of such agreement.

**D. TERMINATION OF ORDERS.** Participating Entities may terminate an order, in whole or in part, immediately upon notice to Supplier in the event of any of the following events:

1. The Participating Entity fails to receive funding or appropriation from its governing body at levels sufficient to pay for the equipment, products, or services to be purchased; or
2. Federal, state, or provincial laws or regulations prohibit the purchase or change the Participating Entity's requirements.

**E. GOVERNING LAW AND VENUE.** The governing law and venue for any action related to a Participating Entity's order will be determined by the Participating Entity making the purchase.

## **7. CUSTOMER SERVICE**

**A. PRIMARY ACCOUNT REPRESENTATIVE.** Supplier will assign an Account Representative to Sourcewell for this Contract and must provide prompt notice to Sourcewell if that person is changed. The Account Representative will be responsible for:

- Maintenance and management of this Contract;
- Timely response to all Sourcwell and Participating Entity inquiries; and
- Business reviews to Sourcwell and Participating Entities, if applicable.

B. BUSINESS REVIEWS. Supplier must perform a minimum of one business review with Sourcwell per contract year. The business review will cover sales to Participating Entities, pricing and contract terms, administrative fees, sales data reports, performance issues, supply issues, customer issues, and any other necessary information.

## **8. REPORT ON CONTRACT SALES ACTIVITY AND ADMINISTRATIVE FEE PAYMENT**

A. CONTRACT SALES ACTIVITY REPORT. Each calendar quarter, Supplier must provide a contract sales activity report (Report) to the Sourcwell Supplier Development Administrator assigned to this Contract. Reports are due no later than 45 days after the end of each calendar quarter. A Report must be provided regardless of the number or amount of sales during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;
- Sourcwell Assigned Entity/Participating Entity Number;
- Item Purchased Description;
- Item Purchased Price;
- Sourcwell Administrative Fee Applied; and
- Date Purchase was invoiced/sale was recognized as revenue by Supplier.

B. ADMINISTRATIVE FEE. In consideration for the support and services provided by Sourcwell, the Supplier will pay an administrative fee to Sourcwell on all Equipment, Products, and Services provided to Participating Entities. The Administrative Fee must be included in, and not added to, the pricing. Supplier may not charge Participating Entities more than the contracted price to offset the Administrative Fee.

The Supplier will submit payment to Sourcwell for the percentage of administrative fee stated in the Proposal multiplied by the total sales of all Equipment, Products, and Services purchased

by Participating Entities under this Contract during each calendar quarter. Payments should note the Supplier's name and Sourcewell-assigned contract number in the memo; and must be mailed to the address above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions. Payments must be received no later than 45 calendar days after the end of each calendar quarter.

Supplier agrees to cooperate with Sourcewell in auditing transactions under this Contract to ensure that the administrative fee is paid on all items purchased under this Contract.

In the event the Supplier is delinquent in any undisputed administrative fees, Sourcewell reserves the right to cancel this Contract and reject any proposal submitted by the Supplier in any subsequent solicitation. In the event this Contract is cancelled by either party prior to the Contract's expiration date, the administrative fee payment will be due no more than 30 days from the cancellation date.

## **9. AUTHORIZED REPRESENTATIVE**

Sourcewell's Authorized Representative is its Chief Procurement Officer.

Supplier's Authorized Representative is the person named in the Supplier's Proposal. If Supplier's Authorized Representative changes at any time during this Contract, Supplier must promptly notify Sourcewell in writing.

## **10. AUDIT, ASSIGNMENT, AMENDMENTS, WAIVER, AND CONTRACT COMPLETE**

A. **AUDIT.** Pursuant to Minnesota Statutes Section 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Contract are subject to examination by Sourcewell or the Minnesota State Auditor for a minimum of six years from the end of this Contract. This clause extends to Participating Entities as it relates to business conducted by that Participating Entity under this Contract.

B. **ASSIGNMENT.** Neither party may assign or otherwise transfer its rights or obligations under this Contract without the prior written consent of the other party and a fully executed assignment agreement. Such consent will not be unreasonably withheld. Any prohibited assignment will be invalid.

C. **AMENDMENTS.** Any amendment to this Contract must be in writing and will not be effective until it has been duly executed by the parties.

D. **WAIVER.** Failure by either party to take action or assert any right under this Contract will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right. Any such waiver must be in writing and signed by the parties.

E. **CONTRACT COMPLETE.** This Contract represents the complete agreement between the parties. No other understanding regarding this Contract, whether written or oral, may be used to bind either party. For any conflict between the attached Proposal and the terms set out in Articles 1-22 of this Contract, the terms of Articles 1-22 will govern.

F. **RELATIONSHIP OF THE PARTIES.** The relationship of the parties is one of independent contractors, each free to exercise judgment and discretion with regard to the conduct of their respective businesses. This Contract does not create a partnership, joint venture, or any other relationship such as master-servant, or principal-agent.

### **11. INDEMNITY AND HOLD HARMLESS**

Supplier must indemnify, defend, save, and hold Sourcewell and its Participating Entities, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell or its Participating Entities, arising out of any act or omission in the performance of this Contract by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in the Equipment, Products, or Services under this Contract to the extent the Equipment, Product, or Service has been used according to its specifications. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.

### **12. GOVERNMENT DATA PRACTICES**

Supplier and Sourcewell must comply with the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13, as it applies to all data provided by or provided to Sourcewell under this Contract and as it applies to all data created, collected, received, maintained, or disseminated by the Supplier under this Contract.

### **13. INTELLECTUAL PROPERTY, PUBLICITY, MARKETING, AND ENDORSEMENT**

#### **A. INTELLECTUAL PROPERTY**

1. *Grant of License.* During the term of this Contract:
  - a. Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising and promotional materials for the purpose of marketing Sourcewell's relationship with Supplier.
  - b. Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising and promotional materials for the purpose of marketing Supplier's relationship with Sourcewell.
2. *Limited Right of Sublicense.* The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers,



resellers, marketing representatives, and agents (collectively “Permitted Sublicensees”) in advertising and promotional materials for the purpose of marketing the Parties’ relationship to Participating Entities. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this Article by any of their respective sublicensees.

*3. Use; Quality Control.*

- a. Neither party may alter the other party’s trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.
- b. Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party’s trademarks only in good faith and in a dignified manner consistent with such party’s use of the trademarks. Upon written notice to the breaching party, the breaching party has 30 days of the date of the written notice to cure the breach or the license will be terminated.

*4. Termination.* Upon the termination of this Contract for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party’s name or logo (excepting Sourcewell’s pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell’s written directions.

B. **PUBLICITY.** Any publicity regarding the subject matter of this Contract must not be released without prior written approval from the Authorized Representatives. Publicity includes notices, informational pamphlets, press releases, research, reports, signs, and similar public notices prepared by or for the Supplier individually or jointly with others, or any subcontractors, with respect to the program, publications, or services provided resulting from this Contract.

C. **MARKETING.** Any direct advertising, marketing, or offers with Participating Entities must be approved by Sourcewell. Send all approval requests to the Sourcewell Supplier Development Administrator assigned to this Contract.

D. **ENDORSEMENT.** The Supplier must not claim that Sourcewell endorses its Equipment, Products, or Services.

#### **14. GOVERNING LAW, JURISDICTION, AND VENUE**

The substantive and procedural laws of the State of Minnesota will govern this Contract. Venue for all legal proceedings arising out of this Contract, or its breach, must be in the appropriate state court in Todd County, Minnesota or federal court in Fergus Falls, Minnesota.

## 15. FORCE MAJEURE

Neither party to this Contract will be held responsible for delay or default caused by acts of God or other conditions that are beyond that party's reasonable control. A party defaulting under this provision must provide the other party prompt written notice of the default.

## 16. SEVERABILITY

If any provision of this Contract is found by a court of competent jurisdiction to be illegal, unenforceable, or void then both parties will be relieved from all obligations arising from that provision. If the remainder of this Contract is capable of being performed, it will not be affected by such determination or finding and must be fully performed.

## 17. PERFORMANCE, DEFAULT, AND REMEDIES

A. PERFORMANCE. During the term of this Contract, the parties will monitor performance and address unresolved contract issues as follows:

1. *Notification.* The parties must promptly notify each other of any known dispute and work in good faith to resolve such dispute within a reasonable period of time. If necessary, Sourcewell and the Supplier will jointly develop a short briefing document that describes the issue(s), relevant impact, and positions of both parties.
2. *Escalation.* If parties are unable to resolve the issue in a timely manner, as specified above, either Sourcewell or Supplier may escalate the resolution of the issue to a higher level of management. The Supplier will have 30 calendar days to cure an outstanding issue.
3. *Performance while Dispute is Pending.* Notwithstanding the existence of a dispute, the Supplier must continue without delay to carry out all of its responsibilities under the Contract that are not affected by the dispute. If the Supplier fails to continue without delay to perform its responsibilities under the Contract, in the accomplishment of all undisputed work, the Supplier will bear any additional costs incurred by Sourcewell and/or its Participating Entities as a result of such failure to proceed.

B. DEFAULT AND REMEDIES. Either of the following constitutes cause to declare this Contract, or any Participating Entity order under this Contract, in default:

1. Nonperformance of contractual requirements, or
2. A material breach of any term or condition of this Contract.

The party claiming default must provide written notice of the default, with 30 calendar days to cure the default. Time allowed for cure will not diminish or eliminate any liability for liquidated or other damages. If the default remains after the opportunity for cure, the non-defaulting party may:

- Exercise any remedy provided by law or equity, or
- Terminate the Contract or any portion thereof, including any orders issued against the Contract.

## 18. INSURANCE

A. REQUIREMENTS. At its own expense, Supplier must maintain insurance policy(ies) in effect at all times during the performance of this Contract with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:

1. *Workers' Compensation and Employer's Liability.*

Workers' Compensation: As required by any applicable law or regulation.

Employer's Liability Insurance: must be provided in amounts not less than listed below:

Minimum limits:

- \$500,000 each accident for bodily injury by accident
- \$500,000 policy limit for bodily injury by disease
- \$500,000 each employee for bodily injury by disease

2. *Commercial General Liability Insurance.* Supplier will maintain insurance covering its operations, with coverage on an occurrence basis, and must be subject to terms no less broad than the Insurance Services Office ("ISO") Commercial General Liability Form CG0001 (2001 or newer edition), or equivalent. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, independent contractors, products-completed operations including construction defect, contractual liability, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Contract.

Minimum Limits:

- \$1,000,000 each occurrence Bodily Injury and Property Damage
- \$1,000,000 Personal and Advertising Injury
- \$2,000,000 aggregate for products liability-completed operations
- \$2,000,000 general aggregate

3. *Commercial Automobile Liability Insurance.* During the term of this Contract, Supplier will maintain insurance covering all owned, hired, and non-owned automobiles in limits of liability not less than indicated below. The coverage must be subject to terms no less broad than ISO Business Auto Coverage Form CA 0001 (2010 edition or newer), or equivalent.

Minimum Limits:

- \$1,000,000 each accident, combined single limit

4. *Umbrella Insurance*. During the term of this Contract, Supplier will maintain umbrella coverage over Employer's Liability, Commercial General Liability, and Commercial Automobile.

Minimum Limits:  
\$2,000,000

5. *Network Security and Privacy Liability Insurance*. During the term of this Contract, Supplier will maintain coverage for network security and privacy liability. The coverage may be endorsed on another form of liability coverage or written on a standalone policy. The insurance must cover claims which may arise from failure of Supplier's security resulting in, but not limited to, computer attacks, unauthorized access, disclosure of not public data – including but not limited to, confidential or private information, transmission of a computer virus, or denial of service.

Minimum limits:  
\$2,000,000 per occurrence  
\$2,000,000 annual aggregate

Failure of Supplier to maintain the required insurance will constitute a material breach entitling Sourcewell to immediately terminate this Contract for default.

B. CERTIFICATES OF INSURANCE. Prior to commencing under this Contract, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Contract. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or sent to the Sourcewell Supplier Development Administrator assigned to this Contract. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf.

Failure to request certificates of insurance by Sourcewell, or failure of Supplier to provide certificates of insurance, in no way limits or relieves Supplier of its duties and responsibilities in this Contract.

C. ADDITIONAL INSURED ENDORSEMENT AND PRIMARY AND NON-CONTRIBUTORY INSURANCE CLAUSE. Supplier agrees to list Sourcewell and its Participating Entities, including their officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.

D. WAIVER OF SUBROGATION. Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Contract or other

insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.

E. UMBRELLA/EXCESS LIABILITY/SELF-INSURED RETENTION. The limits required by this Contract can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

## **19. COMPLIANCE**

A. LAWS AND REGULATIONS. All Equipment, Products, or Services provided under this Contract must comply fully with applicable federal laws and regulations, and with the laws in the states and provinces in which the Equipment, Products, or Services are sold.

B. LICENSES. Supplier must maintain a valid and current status on all required federal, state/provincial, and local licenses, bonds, and permits required for the operation of the business that the Supplier conducts with Sourcewell and Participating Entities.

## **20. BANKRUPTCY, DEBARMENT, OR SUSPENSION CERTIFICATION**

Supplier certifies and warrants that it is not in bankruptcy or that it has previously disclosed in writing certain information to Sourcewell related to bankruptcy actions. If at any time during this Contract Supplier declares bankruptcy, Supplier must immediately notify Sourcewell in writing.

Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government or the Canadian government, as applicable; or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Contract. Supplier further warrants that it will provide immediate written notice to Sourcewell if this certification changes at any time.

## **21. PROVISIONS FOR NON-UNITED STATES FEDERAL ENTITY PROCUREMENTS UNDER UNITED STATES FEDERAL AWARDS OR OTHER AWARDS**

Participating Entities that use United States federal grant or FEMA funds to purchase goods or services from this Contract may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Article, all

references to “federal” should be interpreted to mean the United States federal government. The following list only applies when a Participating Entity accesses Supplier’s Equipment, Products, or Services with United States federal funds.

A. **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all contracts that meet the definition of “federally assisted construction contract” in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. §60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 C.F.R. § 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.” The equal opportunity clause is incorporated herein by reference.

B. **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must be in compliance with all applicable Davis-Bacon Act provisions.

C. **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Where applicable, all contracts awarded by the non-federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5). Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of

not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. This provision is hereby incorporated by reference into this Contract. Supplier certifies that during the term of an award for all contracts by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

D. RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT. If the federal award meets the definition of “funding agreement” under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier certifies that during the term of an award for all contracts by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

E. CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387). Contracts and subgrants of amounts in excess of \$150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). Supplier certifies that during the term of this Contract will comply with applicable requirements as referenced above.

F. DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689). A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. §180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

G. BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352). Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any

person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

H. RECORD RETENTION REQUIREMENTS. To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

I. ENERGY POLICY AND CONSERVATION ACT COMPLIANCE. To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

J. BUY AMERICAN PROVISIONS COMPLIANCE. To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.

K. ACCESS TO RECORDS (2 C.F.R. § 200.336). Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Contract for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.

L. PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322). A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.



M. FEDERAL SEAL(S), LOGOS, AND FLAGS. The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.

N. NO OBLIGATION BY FEDERAL GOVERNMENT. The U.S. federal government is not a party to this Contract or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Contract or any purchase by an authorized user.

O. PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS. The Contractor acknowledges that 31 U.S.C. 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Contract or any purchase by a Participating Entity.

P. FEDERAL DEBT. The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.

Q. CONFLICTS OF INTEREST. The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Contract or any aspect related to the anticipated work under this Contract raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.

R. U.S. EXECUTIVE ORDER 13224. The Supplier, and its subcontractors, must comply with U.S. Executive Order 13224 and U.S. Laws that prohibit transactions with and provision of resources and support to individuals and organizations associated with terrorism.

S. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT. To the extent applicable, Supplier certifies that during the term of this Contract it will comply with applicable requirements of 2 C.F.R. § 200.216.

T. DOMESTIC PREFERENCES FOR PROCUREMENTS. To the extent applicable, Supplier certifies that during the term of this Contract will comply with applicable requirements of 2 C.F.R. § 200.322.

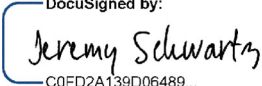
## **22. CANCELLATION**

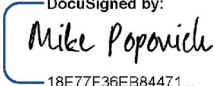
Sourcewell or Supplier may cancel this Contract at any time, with or without cause, upon 60 days' written notice to the other party. However, Sourcewell may cancel this Contract immediately upon discovery of a material defect in any certification made in Supplier's

Proposal. Cancellation of this Contract does not relieve either party of financial, product, or service obligations incurred or accrued prior to cancellation.

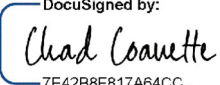
Sourcewell

Gradall Industries, Inc.

DocuSigned by:  
  
 By: C0FD2A139D06489...  
 Jeremy Schwartz  
 Title: Chief Procurement Officer  
 Date: 4/4/2023 | 2:28 PM CDT

DocuSigned by:  
  
 By: 18E77F36EB84471...  
 Michael Popovich  
 Title: President  
 Date: 4/4/2023 | 3:36 PM EDT

Approved:

DocuSigned by:  
  
 By: 7E42B8F817A64CC...  
 Chad Coquette  
 Title: Executive Director/CEO  
 Date: 4/10/2023 | 8:32 AM CDT

# RFP 011723 - Heavy Construction Equipment with Related Attachments and Technology

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## Vendor Details

Company Name: Gradall Industries, Inc.  
Address: 406 Mill Ave. SW  
New Philadelphia, OH 44663  
Contact: Connie Popovich  
Email: cspopovich@gradall.com  
Phone: 330-339-8342 8342  
Fax: 330-339-8468  
HST#: 74-2660540

## Submission Details

Created On: Wednesday November 23, 2022 08:47:32  
Submitted On: Thursday January 12, 2023 20:01:35  
Submitted By: Connie Popovich  
Email: cspopovich@gradall.com  
Transaction #: bea304de-b0ed-4cc6-9345-4633ed8d16f6  
Submitter's IP Address: 24.29.243.246

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## Specifications

**Table 1: Proposer Identity & Authorized Representatives**

**General Instructions** (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; respond "N/A" if the question does not apply to you (preferably with an explanation).

Line Item	Question	Response *
1	Proposer Legal Name (one legal entity only): (In the event of award, will execute the resulting contract as "Supplier")	Gradall Industries LLC
2	Identify all subsidiary entities of the Proposer whose equipment, products, or services are included in the Proposal.	Freightliner Volvo Penta
3	Identify all applicable assumed names or DBA names of the Proposer or Proposer's subsidiaries in Line 1 or Line 2 above.	Gradall Gradall Industries
4	Provide your CAGE code or Unique Entity Identifier (SAM):	SAM: U8GTNV8DFN93
5	Proposer Physical Address:	406 Mill Ave. SW New Philadelphia, OH 44663
6	Proposer website address (or addresses):	<a href="https://www.gradall.com">https://www.gradall.com</a>
7	Proposer's Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the "Proposer's Assurance of Compliance" on behalf of the Proposer and, in the event of award, will be expected to execute the resulting contract):	Michael Popovich President 406 Mill Ave. SW, New Philadelphia, OH 44663 mjpopovich@gradall.com Cell: 330-204-9270
8	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Connie Popovich Asst. Brand Manager, Excavators 406 Mill Ave. SW, New Philadelphia, OH 44663 cspopovich@gradall.com Cell: 330-691-9007
9	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	Mark Allison Director Excavator Product 406 Mill Ave. SW, New Philadelphia, OH 44663 mdallison@gradall.com Cell: 540-819-6638

**Table 2: Company Information and Financial Strength**

Line Item	Question	Response *
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10	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested equipment, products or services.	<p>Gradall is the leading manufacturer of hydraulic wheeled excavators in North America. All Gradall Excavators are sold and serviced through one of the most extensive, experienced, and financially strong dealer networks in the off-highway industry.</p> <p>Invented by a road contractor in 1945 to solve a post WWII labor shortage, the Gradall's unique rotating and telescopic boom allows it to efficiently perform any right-of-way maintenance work such as ditching, grading, landscaping, or placing of material. Additionally, these machines were used extensively on all the great road and bridge building projects throughout the 1950's and 1960's including the creation of the Interstate Highway System and the Alaskan Pipeline.</p> <p>Over time, the Gradall has become highly developed to perform specialized work in various critical off-highway industry segments. These segments include, but are not limited to, municipal right-of-way maintenance, road and bridge work, railway maintenance-of-way (MOW), mine scaling, and metal mill maintenance.</p> <p>Gradall is an ISO9001 certified company that is known to produce durable, high-quality machines that have an average lifespan of more than 20 years. In 2017 Gradall celebrated with pride the manufacture of their 20,000th excavator. Since 2006, Gradall has been wholly owned by the Alamo Group (ALG) which owns and manages more than 30 companies around the world that specialize in the manufacture of right-of-way maintenance, mowing, snow removal, vacuum truck and street sweeper related heavy equipment.</p>	*
11	What are your company's expectations in the event of an award?	Sourcewell is the only cooperative purchasing partner directly supported by Gradall. Sourcewell allows us to efficiently reach most of the Municipalities in North America who are interested in purchasing a Gradall Excavator. The pre-bidding process utilized by Sourcewell allows us to offer standard, transparent, competitive pricing which should reduce our customer's overall purchase price as well as simplify and expedite their purchase process with predetermined bid pricing and state-wide piggyback contracts, where possible.	*
12	Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response.	Gradall Industries is a profitable, 75+ year-old company that is wholly owned by the Alamo Group, a publicly traded company under the label ALG on the New York Stock Exchange. See the attached most recent Alamo Group 10-K SEC filing and Quarterly Financial Report.	*
13	What is your US market share for the solutions that you are proposing?	United States Wheeled Excavator Market Share: >33% every single year since industry market share data has been tracked.	*
14	What is your Canadian market share for the solutions that you are proposing?	Canadian Wheeled Excavator Market Share: <5%.	*
15	Has your business ever petitioned for bankruptcy protection? If so, explain in detail.	Gradall has never been bankrupt and although owned by quite a few companies over their 75+ year history, has always been profitable.	*
16	<p>How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer whichever question (either a) or b) just below) best applies to your organization.</p> <p>a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned?</p> <p>b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?</p>	<p>Gradall is a complete OEM of Telescopic Boom Excavators manufactured wholly in New Philadelphia, OH. Our modern, 500,000 sq.-ft. facility converts raw materials such as steel into complete machines utilizing the latest in robotic welders and machine centers, assembly lines and powder coat processes.</p> <p>Gradall has an excellent off-highway equipment dealer network. Developed over decades we have a total of 28 large, privately-owned, and independent dealers covering the United States with over 180 individual Sales &amp; Service locations. Each Dealer is properly trained in Sales &amp; Support, stocks new machines and service parts and covers their entire geographic region with mobile service trucks for the very best onsite service and maintenance work. Additionally, Gradall employs a full staff of Sales and Product Support Managers that work with dealers and customers alike to quote, demo, and deliver machines as needed.</p>	*
17	If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.	<p>Gradall must hold state-level OEM Licenses to assign and authorize local dealers to sell and support Gradall Excavators.</p> <p>Gradall is an ISO 9001:2015 Certified Company. Originally issued January 8, 1999.</p>	*
18	Provide all "Suspension or Debarment" information that has applied to your organization during the past ten years.	Gradall has never been suspended or debarred and prides itself on amicable and responsible resolutions that do not require legal action.	*

**Table 3: Industry Recognition & Marketplace Success**

Line Item	Question	Response *
19	Describe any relevant industry awards or recognition that your company has received in the past five years	<p>2022 Association of Equipment Manufacturers Advocacy Award – Gold Level The AEM Advocacy Award recognizes AEM member companies that help advance the industry’s policy priorities through a range of advocacy efforts, including active participation in AEM’s state and federal advocacy efforts, public affairs initiatives, and AEM’s award-winning national grassroots advocacy campaign, I Make America. <a href="https://www.aem.org/news/aem-announces-2022-advocacy-award-honorees">https://www.aem.org/news/aem-announces-2022-advocacy-award-honorees</a></p> <p>2020 Association of Equipment Manufacturers – Hall of Fame Ray &amp; Koop Ferwerda, the inventors of the Gradall in 1946, were admitted to the AEM Hall of Fame. Since 2008, the AEM Hall of Fame has honored pioneering individuals who have invented, managed, built, and led the off-road equipment industry. Individually and collectively, they represent some of the best, brightest, and most influential minds in the history of the off-road equipment industry. <a href="https://www.aem.org/about/hall-of-fame">https://www.aem.org/about/hall-of-fame</a></p> <p>2020 Contractor’s Choice Award – Roads &amp; Bridges D174 &amp; D172 Discovery Series Excavator Models. <a href="https://gradall.com/news-releases.php?news_id=76">https://gradall.com/news-releases.php?news_id=76</a></p> <p>2017 Construction Equipment Magazine 100 most significant products 3200 V LoPro and 3300 V <a href="https://gradall.com/news-releases.php?news_id=56">https://gradall.com/news-releases.php?news_id=56</a></p>
20	What percentage of your sales are to the governmental sector in the past three years	Most of our sales are to municipalities such as State DOT’s, Counties and Cities and these represent nearly 70% of all our sales volume over the past three years. *
21	What percentage of your sales are to the education sector in the past three years	Gradall does not sell directly to nor track sales activity related to the education sector although municipalities and contractors most likely buy and use our equipment for construction and maintenance purposes related to education. *
22	List any state, provincial, or cooperative purchasing contracts that you hold. What is the annual sales volume for each of these contracts over the past three years?	Sourcewell is the only cooperative purchasing contract that Gradall holds. We recommend it above all other purchasing solutions and have built Sourcewell into our proprietary quoting system. A few Gradall Dealers hold local cooperative purchasing contracts with our support such as GSA or HGAC, for example. *
23	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	Federal Contracts Corporation (FCC) has always held our GSA contract and we typically sell 1-3 machines through them each year to various military bases. *

**Table 4: References/Testimonials**

**Line Item 24.** Supply reference information from three customers who are eligible to be Sourcewell participating entities.

Entity Name *	Contact Name *	Phone Number *
Town of Schroepfel 69 Co Rte 57A Phoenix, NY 13135	Cliff Hoyt Jr	315-695-5454
Town of Sullivan 7507 Lakeport Road Chittenango, NY 13037	Andy Busa Hwy Supt.	315-687-6031
Erie County 5105 Salt Road Clarence, NY 14031	Pat Baskerville	716-759-8328
City of Houston	Philip Hibbler	832-395-3208
Baldwin County Alabama Fleet Mgr.	James Martiin	251-348-0135

**Table 5: Top Five Government or Education Customers**

**Line Item 25.** Provide a list of your top five government, education, or non-profit customers (entity name is optional), including entity type, the state or province the entity is located in, scope of the project(s), size of transaction(s), and dollar volumes from the past three years.

Entity Name	Entity Type *	State / Province *	Scope of Work *	Size of Transactions *	Dollar Volume Past Three Years *
Texas Dept. Of Transportation	Government	Texas - TX	Road & Bridge Construction, Municipal Right-of-way maintenance	Multiple Machines	\$11,090,303.00
WV Dept. of Highways	Government	West Virginia - WV	Road & Bridge Construction, Municipal Right-of-way maintenance	Multiple Machines	\$4,309,696.00
Montgomery County	Government	Maryland - MD	Road & Bridge Construction, Municipal Right-of-way maintenance	Multiple Machines	\$2,010,499.00
Pennsylvania Dept. of Transportation	Government	Pennsylvania - PA	Road & Bridge Construction, Municipal Right-of-way maintenance	Multiple Machines	\$1,819,627.00
Brevard County	Government	Florida - FL	Road & Bridge Construction, Municipal Right-of-way maintenance	Multiple Machines	\$1,181,304.00

**Table 6: Ability to Sell and Deliver Service**

Describe your company's capability to meet the needs of Sourcwell participating entities across the US and Canada, as applicable. Your response should address in detail at least the following areas: locations of your network of sales and service providers, the number of workers (full-time equivalents) involved in each sector, whether these workers are your direct employees (or employees of a third party), and any overlap between the sales and service functions.

Line Item	Question	Response *
26	Sales force.	Gradall sells to municipalities exclusively through a dedicated, independent Distribution Network where the Dealers have Assigned Areas of Responsibility (APR) without any overlap. Assisting and working with the Dealers are Gradall Account Managers who help with quoting, demonstrations, customer visits, and shows. They generally ensure that the Dealer promotes and prioritizes the product line properly. Gradall Account Managers are direct, full-time employees of Gradall Industries.
27	Dealer network or other distribution methods.	Gradall has a total of 28 privately owned, independent dealers which includes a total of 180 brick-and-mortar, sales & service locations and over 600 dedicated Salesmen and 500 product support personnel and technicians.
28	Service force.	<p>Along with a complete sales team, Gradall employs a team of full-time product support managers to assist our dealer network with technical issues, training, parts support, customer visits and warranty questions. They are available from 8-5 EST at 1-800-445-4752 and each dealer has an assigned product support manager with direct cell phone access. Customers are instructed how to contact their appropriate Gradall dealer in the event of a question or issue.</p> <p>The Gradall dealer network employs over 500 dedicated product support personnel &amp; technicians. Unlike the automotive or over-highway truck industries, our dealers service the construction equipment industry and are used to traveling to the customer's worksite or equipment yard in large service trucks to perform any required maintenance or repairs. Additionally, most of our dealers are capable of complete-machine warranty work because they have taken the additional steps to be certified for work on the Volvo Penta engines that we use in most of our excavators. If a customer experiences an issue they only have one call to make to get it handled: the Gradall dealer.</p>

29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	<ol style="list-style-type: none"> <li>1. Municipality contacts their local Gradall dealer and asks for a Sourcewell machine quote.</li> <li>2. Dealer salesman determines appropriate model, options &amp; attachments.</li> <li>3. Dealer salesman creates a Sourcewell-specific quote from within the Gradall quoting system and presents it to the municipality. If required, Connie Popovich is available for assistance with the creation of the Sourcewell quote.</li> <li>4. The Sourcewell-specific quote includes contract pricing, a freight estimate based upon actual cost, and any open market items, if applicable.</li> <li>5. If the quote is acceptable, the Municipality cuts a purchase order to the dealer.</li> <li>6. Dealer places a matching machine order with Gradall.</li> <li>7. Gradall builds the machine to the quote specification and ships it to the dealer.</li> <li>8. Dealer receives the machine and PDI's it for delivery to the municipality.</li> <li>9. Dealer delivers machine and performs operator familiarization, as required.</li> <li>10. Dealer registers the machine through the Gradall product support website.</li> <li>11. Gradall logs the Sourcewell sale and compiles sales information for quarterly report and fee payment to Sourcewell.</li> </ol>	*
30	Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.	Our privately-owned and independent dealers own full-service locations and are completely responsible for product support including parts, training, maintenance, service, and warranty. The level of support can vary dealer to dealer; however, most have existing programs that guarantee onsite visits within 24 hours and an available 24/7 hotline.	*
31	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in the United States.	Sourcewell is our only factory-direct cooperative purchasing contract and we will sell to any member through our Dealer Network in the United States.	*
32	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	Currently, Sourcewell sales by Gradall into Canada are non-existent primarily due to the slow take-up of cooperative purchasing contracts especially for large capital expenditures like a Gradall excavator. However, interest is growing among municipalities in Canada to utilize cooperative purchasing solutions and our quoting activity is increasing so it is only a matter of time until sales begin to occur there. Since we support Sourcewell quoting through our factory quoting system to all our dealers, including those in Canada, we will be ready when that day comes. In the meantime, we will continue to be involved in any effort by Sourcewell to pioneer acceptable cooperative purchasing solutions such as Canoe in Canada.	*
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed contract.	There are no geographic areas in the United States or Canada that Gradall cannot support sales of machines through the Sourcewell contract.	*
34	Identify any Sourcewell participating entity sectors (i.e., government, education, not-for-profit) that you will NOT be fully serving through the proposed contract. Explain in detail. For example, does your company have only a regional presence, or do other cooperative purchasing contracts limit your ability to promote another contract?	Sourcewell is the only cooperative purchasing contract we own, maintain, and support at Gradall. All other contracts are owned through specific dealers regionally or by FCC for the GSA contract. The ability to generate a Sourcewell quote from within our quoting system is natively supported and with one click a Sourcewell end-user and matching dealer quote can be created by any Gradall dealer. We will willingly – and prefer – to sell to any Sourcewell member through our Dealer Network anywhere in the United States & Canada, and many of our dealers actively pursue using the contract for all their Gradall municipal sales.	*
35	Define any specific contract requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	Currently, we do not have a dedicated Dealer in Alaska or Hawaii although we do sell machines there occasionally. This is usually done through one of our existing Dealers who have a presence there or through a Dealer who the Customer already has an existing business relationship. These are not large markets for our excavators so finding a dedicated Dealer willing to invest properly in the support of the product line is difficult given the sales volumes involved so it is handled on an ad hoc basis.	*



**Table 7: Marketing Plan**

Line Item	Question	Response *
36	Describe your marketing strategy for promoting this contract opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<ul style="list-style-type: none"> <li>• Gradall's website includes a Sourcewell landing page: <a href="http://www.gradall.com/sourcewell.php">http://www.gradall.com/sourcewell.php</a>.</li> <li>• All marketing material includes the Sourcewell logo and where possible it links to our Sourcewell landing page.</li> <li>• We attend shows and visit customers with Sourcewell specific handouts.</li> <li>• Dealers are specifically trained to utilize the Sourcewell contract wherever possible.</li> <li>• The Gradall Quoting System (GIQuote.com) includes native, one-click support for Sourcewell quotes.</li> </ul>
37	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	Gradall retains an advertising agency, and they manage all aspects of our marketing: Web, Email Blasts, Group Texts, Lead Management, Literature, Advertising (all forms), Dealer Coop Material, YouTube (Gradall TV), Twitter, Facebook, etc. Before each calendar year we meet and put together a comprehensive marketing plan that addresses how we plan to attack our various markets. This assures us of a consistent, centralized, and highly focused approach to proper brand management and machine sales. Sourcewell is always a significant part of that planning process, and any marketing work includes the promotion of the contract.
38	In your view, what is Sourcewell's role in promoting contracts arising out of this RFP? How will you integrate a Sourcewell-awarded contract into your sales process?	Gradall has a proprietary quoting system with Sourcewell quotes built right in. Pick a Gradall Excavator Model, Terms, Warranty, Options & Attachments then print/email off as a Sourcewell Quote. Very simple and efficient process that has helped us to effectively promote the Sourcewell Contract.
39	Are your products or services available through an e-procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.	Gradall does not support an e-procurement ordering process due to the complexity and customization required by many of our Municipal Customers.

**Table 8: Value-Added Attributes**

Line Item	Question	Response *
40	Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.	Our dealers can provide a quote for formal and extensive operator and maintenance training as requested by the customer. In addition, we provide operator familiarization training with every machine delivery at no charge. This is typically about 4 hours of training at the customer location to ensure they know the basics needed to operate and maintain the machine properly and safely. More advanced operator and technical training is available upon request.
41	Describe any technological advances that your proposed products or services offer.	Gradall Excavators use the latest components available to the construction industry. Our list of Vendors includes but is not limited to: Bosch Rexroth, Allison, ZF, Meritor, Parker, Volvo, Freightliner, DMF, and Crenlo. Each machine uses state-of-the-art Can Bus processors and programming that can be configured with the use of a laptop and they all have a standard connection point for any telematics solution that the customer may prefer to use.
42	Describe any "green" initiatives that relate to your company or to your products or services, and include a list of the certifying agency for each.	Gradall Industries takes sustainability very seriously and has designed its current products to utilize one diesel engine per machine as opposed to the more traditional truck engine and pony engine layout. Single engine designs are less costly to manufacture, simpler to operate and maintain, and are much friendlier to the environment.
43	Identify any third-party issued eco-labels, ratings or certifications that your company has received for the equipment or products included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.	Gradall's parent company, Alamo Group Inc. (NYSE: ALG) has announced a 2030 target to reduce its greenhouse gas emissions by 50% as compared to its 2019 base year. This target covers Scope 1 & 2 emissions as defined in The Greenhouse Gas (GHG) Protocol Corporate Accounting and Reporting Standards published by the World Business Council for Sustainable Development and World Resources Institute. Additional information regarding the Company's sustainability goals and actual emissions for the past three years will be included in its forthcoming Sustainability Report.
44	Describe any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation of certification (as applicable) in the document upload section of your response.	We are not a WMBE or SBE.
45	What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?	Gradall Excavators are the only telescopic-boom excavator widely sold in North America. This boom design is uniquely suited for use by municipalities & contractors for ditching, mowing, natural disaster cleanup and road/bridge maintenance. Additionally, the truck-mounted models allow for single operator use out of a dedicated maintenance yard without the need for a haul truck and trailer. These machines can be dispatched efficiently to many locations throughout the workday. For these reasons most municipalities in North America own and operate Gradall Excavators as opposed to owning a conventional knuckle-boom excavator which are optimized for mass excavation at one job.

**Table 9: Warranty**

**Describe in detail your manufacturer warranty program, including conditions and requirements to qualify, claims procedure, and overall structure. You may upload representative samples of your warranty materials (if applicable) in the document upload section of your response in addition to responding to the questions below.**

Line Item	Question	Response *
46	Do your warranties cover all products, parts, and labor?	Yes, Standard Warranty on Gradall Excavators is 24 months or 3,000 operating hours, whichever comes first from the date of delivery to the customer. We also offer Extended Warranty for additional warranty. For a full description of our warranty policy see the uploaded Gradall Warranty Certificate
47	Do your warranties impose usage restrictions or other limitations that adversely affect coverage?	We do not have usage restrictions. Per our policy, we cover defects in material & workmanship when the equipment is used as designed.
48	Do your warranties cover the expense of technicians' travel time and mileage to perform warranty repairs?	Our warranty covers up to 3 hours of travel time per incident.
49	Are there any geographic regions of the United States or Canada (as applicable) for which you cannot provide a certified technician to perform warranty repairs? How will Sourcewell participating entities in these regions be provided service for warranty repair?	Gradall has a Dealer Network across the entire United States & Canada and can provide trained technicians for required repairs. We also provide trained service technicians at the factory to help with any issues in the field
50	Will you cover warranty service for items made by other manufacturers that are part of your proposal, or are these warranties issues typically passed on to the original equipment manufacturer?	Excavators will be covered bumper to bumper by our dealer network with the exception of the Allison Transmission and the Volvo engine. During delivery the customer is always informed to call the dealer for any problems and the dealer can decide when to involve Allison, Volvo Penta, Gradall etc.
51	What are your proposed exchange and return programs and policies?	Whole goods: No exchange program. If a part is defective, it would be covered under our standard 24-month warranty.  Service Parts: Service Parts warranty is one year
52	Describe any service contract options for the items included in your proposal.	Service contracts are offered thru our dealer networks but not offered by Gradall thru the Sourcewell Contract.

**Table 10: Payment Terms and Financing Options**

Line Item	Question	Response *
53	Describe your payment terms and accepted payment methods.	Our payment terms are Net 30. However, our dealer's payment terms may vary.
54	Describe any leasing or financing options available for use by educational or governmental entities.	We provide access to 3rd party leasing or financing options upon request. Our dealers also provide other financing options which are available to customers
55	Describe any standard transaction documents that you propose to use in connection with an awarded contract (order forms, terms and conditions, service level agreements, etc.). Upload a sample of each (as applicable) in the document upload section of your response.	The Gradall quoting system can generate a direct to customer quote with sourcewell contract pricing, discounting, contract number and sourcewell logo. This is the only unique transactional document and an example of one is included in the attached documentation.
56	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?	No. All purchase orders go through our authorized dealer and we have never been ask to accept it.

**Table 11: Pricing and Delivery**

Provide detailed pricing information in the questions that follow below. Keep in mind that reasonable price and product adjustments can be made during the term of an awarded Contract as described in the RFP, the template Contract, and the Sourcewell Price and Product Change Request Form.

Line Item	Question	Response *
57	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcewell discounted price) on all of the items that you want Sourcewell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	We offer Sourcewell members 4% off MSRP List Price for the entire completed and quoted machine. See attached for pricing documentation.
58	Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.	4% off MSRP List Price.
59	Describe any quantity or volume discounts or rebate programs that you offer.	Volume discount will be taken into consideration by our dealers and Gradall Industries at time of order based on the number of machines or repeat purchases from the member.
60	Propose a method of facilitating "sourced" products or related services, which may be referred to as "open market" items or "nonstandard options". For example, you may supply such items "at cost" or "at cost plus a percentage," or you may supply a quote for each such request.	Sourced goods or non-sourcewell items are available to purchase by our Sourcewell members. To come up with a fair market price Gradall will produce a list price based on the items cost + margin which may include any engineering time needed to produce this special option.
61	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	Pre-Delivery inspection, training, freight & dealer labor is not included in the Sourcewell contract and are not subject to the fee or quarterly reporting.
62	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	Freight can be quoted and will be added to the invoice at time of shipment. Also freight from Dealer to customer will be added. Dealer or customer also has the option to come in and pick up their machine or set up their own transport when unit is ready to ship.
63	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	Just as we offer for the continental U.S., all shipping / freight charges are based on actual costs and any additional costs associated to the dealers to transport the units to the customer.
64	Describe any unique distribution and/or delivery methods or options offered in your proposal.	There are not any other than what we have already described. Should we receive any unique member requests, we would certainly take them into consideration and they are open for discussion on a case-by-case basis.

**Table 12: Pricing Offered**

Line Item	The Pricing Offered in this Proposal is: *	Comments
65	c. better than the Proposer typically offers to GPOs, cooperative procurement organizations, or state purchasing departments.	

**Table 13: Audit and Administrative Fee**

Line Item	Question	Response *
66	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed Contract with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing, that the Vendor reports all sales under the Contract each quarter, and that the Vendor remits the proper administrative fee to Sourcewell. Provide sufficient detail to support your ability to report quarterly sales to Sourcewell as described in the Contract template.	All quotes & sales are reviewed by the contract administrator to assure pricing standards & Sourcewell Contract compliance.
67	If you are awarded a contract, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the contract.	We use various ways to track success of the Sourcewell sales. We maintain a spreadsheet showing all sales quarterly from year to year and show our Sourcewell sales on our yearly order board. We can also track in our quoting system.
68	Identify a proposed administrative fee that you will pay to Sourcewell for facilitating, managing, and promoting the Sourcewell Contract in the event that you are awarded a Contract. This fee is typically calculated as a percentage of Vendor's sales under the Contract or as a per-unit fee; it is not a line-item addition to the Member's cost of goods. (See the RFP and template Contract for additional details.)	We would propose to continue the 1% Sourcewell fee that is currently in place with Sourcewell. The 1% fee would exclude freight, Pre-Delivery Inspection, any customer supplied labor or any "non" Sourcewell items and training. The 1% Sourcewell fee is based on net dollar amount of customer quote and is after any trade in allowance for machines being traded in.

**Table 14A: Depth and Breadth of Offered Equipment Products and Services**

Line Item	Question	Response *
69	Provide a detailed description of the equipment, products, and services that you are offering in your proposal.	<p>a) D152 &amp; D172 (4x2), D154 &amp; D174 (4x4): The budget-friendly Discovery Series Highway Speed Excavator mounted on a proprietary Freightliner Chassis. Available in the 15 &amp; 17 Ton weight classes with 24' 9" of reach and capable of lifting over 4700 lbs. Multiple options and pin-on attachments can be selected that are exclusive to the Discovery Series. The D172 &amp; D174 are the latest models that feature enhanced axle capacities, all-electric steering from the excavator cab and new, optimized dig modes.</p> <p>b) XL3100 V, XL4100 V, XL5100 V: Our bread-and-butter XL Series Highway Speed Excavators are widely used by municipalities and contractors throughout north America. Available in three different weight classes (20 Ton, 25 Ton &amp; 30 Ton) with a wide range of options, attachments, and available AWD. The original Gradall built back in 1946 was on a truck chassis and it continues to be our most popular machine today.</p> <p>c) XL3200 V, XL4200 V, XL5200 V: Our three primary excavator sizes (20 Ton, 25 Ton &amp; 30 Ton) mounted on a tracked undercarriage for use on unimproved job sites. Available with a wide range of options &amp; attachments that are common to all our XL Series Excavators.</p> <p>d) XL3300 V, XL4300 V, XL5300 V: Our three primary excavator sizes (20 Ton, 25 Ton &amp; 30 Ton) mounted on a Rough-Terrain undercarriage where longer distances are traveled on unimproved surfaces. Growing in popularity these models are far superior to other Rough-Terrain excavators with conventional knuckle-booms due to their inherent stability without the need for outriggers and their ability to work under bridges and power lines in residential areas. Available with a wide range of options &amp; attachments that are common to all our XL Series Excavators.</p> <p>e) XL3330 V, XL4330 V, XL4130 V RD, XL5130 V RD: Catering to Railroad Maintenance-Of-Way (MOW) these four models, two Rough-Terrain weight classes (20 Ton &amp; 25 Ton) and two Highway Speed weight classes (25 Ton and 30 Ton) are turn-key ready to work on the rail with complete FRA Compliance (Federal Railroad Administration) and a wide range of options &amp; attachments that are common to all our XL Series Excavators. The latest 4130 &amp; 5130 models have been significantly upgraded with the capability to drive up to 25 MPH in both forward and reverse from the excavator cab. Additionally, these models now have the option for railcar couplers (front and back) and train air and can tow multiple railcars with material or attachments to and from the job site. (See attached spec sheets under documents)</p>
70	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	<p>a) Water Control: Grading, Ditching &amp; Dredging.</p> <p>b) Pick &amp; Carry: Culverts &amp; Barriers.</p> <p>c) Vegetation Control: Mowing, Trimming &amp; Clearing.</p> <p>d) Residential Maintenance: Replacement of Curbs, Gutters, Sidewalks, &amp; Driveways.</p> <p>e) Road &amp; Bridge Construction and Maintenance.</p> <p>f) Railroad Maintenance-Of-Way (MOW).</p> <p>g) High speed travel (60 MPH) on roads or rail (25+ MPH).</p> <p>h) Superior stability without requirement for outriggers – some jobs cannot be completed with outriggers.</p> <p>i) Precise Boom Placement for finish work.</p>

**Table 14B: Depth and Breadth of Offered Equipment Products and Services**

Indicate below if the listed types or classes of equipment, products, and services are offered within your proposal. Provide additional comments in the text box provided, as necessary.

Line Item	Category or Type	Offered *	Comments
71	Wheeled, tracked, and backhoe loaders	<input type="radio"/> Yes <input checked="" type="radio"/> No	We do not offer backhoe loaders
72	Motor Graders	<input type="radio"/> Yes <input checked="" type="radio"/> No	We do not offer Motor Graders
73	Wheeled and tracked excavators	<input checked="" type="radio"/> Yes <input type="radio"/> No	
74	Bulldozers, compactors, scrapers, articulated and rigid haulers	<input type="radio"/> Yes <input checked="" type="radio"/> No	We do not offer Bulldozers, compactors, scrapers, articulated and rigid haulers
75	Cranes	<input type="radio"/> Yes <input checked="" type="radio"/> No	We do not offer cranes
76	Accessories or attachments for the offering in #71-75 above	<input checked="" type="radio"/> Yes <input type="radio"/> No	We offer many options and accessories for the models in this contract
77	Technology or services for the offering in #71-75 above	<input checked="" type="radio"/> Yes <input type="radio"/> No	We offer various services & training both internal & external for the models we have offer

**Table 14C: Required Offering of Equipment**

Indicate below if the proposer's proposal includes at least one (1) of the following listed types or classes of equipment. Provide additional comments in the text box provided, as necessary.

Line Item	Category or Type	Offered *	Comments
78	Wheel loader with published net horsepower (HP) of at least 300 HP	<input type="radio"/> Yes <input checked="" type="radio"/> No	We do not offer wheel loaders
79	Wheeled or tracked excavator with a published net horsepower (HP) of at least 150 HP	<input checked="" type="radio"/> Yes <input type="radio"/> No	We do offer wheeled or tracked excavators that exceed the 150 HP requirement
80	Motor Grader with a published maximum operating weight of at least 30,000 lbs.	<input type="radio"/> Yes <input checked="" type="radio"/> No	We do not offer Motor Graders
81	Rough terrain, all terrain, crawler, floating, lattice, or telescopic crane with a published maximum lifting capacity of at least 300 tons and a published maximum boom length of at least 150 feet	<input type="radio"/> Yes <input checked="" type="radio"/> No	We do not offer cranes

**Table 15: Exceptions to Terms, Conditions, or Specifications Form**

**Line Item 82. NOTICE:** To identify any exception, or to request any modification, to the Sourcwell template Contract terms, conditions, or specifications, a Proposer must submit the exception or requested modification on the **Exceptions to Terms, Conditions, or Specifications Form** immediately below. The contract section, the specific text addressed by the exception or requested modification, and the proposed modification must be identified in detail. Proposer's exceptions and proposed modifications are subject to review and approval of Sourcwell and will not automatically be included in the contract.

Contract Section	Term, Condition, or Specification	Exception or Proposed Modification
		No Exceptions

**Documents**

**Ensure your submission document(s) conforms to the following:**

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.
3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.
4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as "Marketing Plan."
  - [Pricing](#) - RFP 011723 Excavator Base Model & Option Pricing - Final 1-9-23.xlsx - Monday January 09, 2023 12:51:09
  - [Financial Strength and Stability](#) - 2021 10K and 2022 10Q Q3 - Alamo Group.zip - Thursday January 05, 2023 20:51:27
  - [Marketing Plan/Samples](#) - Sourcewell Marketing Examples.pdf - Thursday January 12, 2023 19:28:10
  - [WMBE/MBE/SBE or Related Certificates](#) - ISO Certification.pdf - Thursday January 05, 2023 20:51:03
  - [Warranty Information](#) - Gradall Warranty Certificate.pdf - Thursday January 05, 2023 21:00:56
  - [Standard Transaction Document Samples](#) - Sourcewell Example.pdf - Thursday January 05, 2023 07:58:34
  - [Upload Additional Document](#) - Model Specs & Territory Maps.zip - Thursday January 05, 2023 15:28:01



## Addenda, Terms and Conditions

### PROPOSER AFFIDAVIT AND ASSURANCE OF COMPLIANCE

I certify that I am the authorized representative of the Proposer submitting the foregoing Proposal with the legal authority to bind the Proposer to this Affidavit and Assurance of Compliance:

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for contract award.
3. The Proposer, including any person assisting with the creation of this Proposal, has arrived at this Proposal independently and the Proposal has been created without colluding with any other person, company, or parties that have or will submit a proposal under this solicitation; and the Proposal has in all respects been created fairly without any fraud or dishonesty. The Proposer has not directly or indirectly entered into any agreement or arrangement with any person or business in an effort to influence any part of this solicitation or operations of a resulting contract; and the Proposer has not taken any action in restraint of free trade or competitiveness in connection with this solicitation. Additionally, if Proposer has worked with a consultant on the Proposal, the consultant (an individual or a company) has not assisted any other entity that has submitted or will submit a proposal for this solicitation.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest exists when a vendor has an unfair competitive advantage or the vendor's objectivity in performing the contract is, or might be, impaired.
5. The contents of the Proposal have not been communicated by the Proposer or its employees or agents to any person not an employee or legally authorized agent of the Proposer and will not be communicated to any such persons prior to Due Date of this solicitation.
6. If awarded a contract, the Proposer will provide to Sourcewell Participating Entities the equipment, products, and services in accordance with the terms, conditions, and scope of a resulting contract.
7. The Proposer possesses, or will possess before delivering any equipment, products, or services, all applicable licenses or certifications necessary to deliver such equipment, products, or services under any resulting contract.
8. The Proposer agrees to deliver equipment, products, and services through valid contracts, purchase orders, or means that are acceptable to Sourcewell Members. Unless otherwise agreed to, the Proposer must provide only new and first-quality products and related services to Sourcewell Members under an awarded Contract.
9. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
10. The Proposer understands that Sourcewell will reject RFP proposals that are marked "confidential" (or "nonpublic," etc.), either substantially or in their entirety. Under Minnesota Statutes Section 13.591, subdivision 4, all proposals are considered nonpublic data until the evaluation is complete and a Contract is awarded. At that point, proposals become public data. Minnesota Statutes Section 13.37 permits only certain narrowly defined data to be considered a "trade secret," and thus nonpublic data under Minnesota's Data Practices Act.
11. Proposer its employees, agents, and subcontractors are not:
  1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
  2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
  3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated

by the State of Minnesota; the United States federal government or the Canadian government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - Michael Popovich, President, Gradall Industries LLC

The Proposer declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Proposer foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the bid.

Yes  No

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document.

Check the box in the column "I have reviewed this addendum" below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
<b>Addendum_5_Heavy_Construction_Equipment_RFP_011723</b> Tue January 10 2023 08:47 AM	<input checked="" type="checkbox"/>	1
<b>Addendum_4_Heavy_Construction_Equipment_RFP_011723</b> Fri January 6 2023 09:51 AM	<input checked="" type="checkbox"/>	2
<b>Addendum_3_Heavy_Construction_Equipment_RFP_011723</b> Thu December 29 2022 12:33 PM	<input checked="" type="checkbox"/>	2
<b>Addendum_2_Heavy_Construction_Equipment_RFP_011723</b> Wed December 21 2022 01:49 PM	<input checked="" type="checkbox"/>	1
<b>Addendum_1_Heavy_Construction_Equipment_RFP 011723</b> Thu December 15 2022 09:27 AM	<input checked="" type="checkbox"/>	1

**AMENDMENT #1  
TO  
CONTRACT #011723-GRD**

THIS AMENDMENT is effective upon the date of the last signature below by and between **Sourcewell** and **Gradall Industries, Inc., now known as Gradall Industries, LLC** (Supplier).

Sourcewell awarded a contract to the Supplier to provide Heavy Construction Equipment with Related Attachments and Technology to Sourcewell and its Participating Entities, effective April 10, 2023, through April 14, 2027 (Contract).

On July 1, 2022, Alamo Group, Inc., the parent company of Gradall Industries, Inc., converted the company to Gradall Industries, LLC. As of the date of this Amendment, all references to "Gradall Industries, Inc." in Contract 011723-GRD will be read as "Gradall Industries, LLC."

Except as amended, the Contract remains in full force and effect.

**Sourcewell**

**Gradall Industries, Inc., now known as  
Gradall Industries, LLC**

DocuSigned by:  
  
COFD2A139D06489...  
Jeremy Schwartz  
Chief Procurement Officer

DocuSigned by:  
  
1EDB2695FAA7407...  
Connie S. Popovic  
Asst. Product Brand Mgr. Excavators

Date: 2/16/2024 | 10:44 AM CST

Date: 2/16/2024 | 7:56 AM CST