

EXHIBIT D
ELEVATOR MODERNIZATION SCOPE OF WORK

I. Definitions.

- a. Modernization: The process of upgrading elevator systems to improve performance, efficiency, safety, and compliance with current codes and industry standards. This includes controller upgrades, door operator replacements, cab interior renovations, and structural modifications to meet accessibility and safety requirements.
- b. Availability: The percentage of time an elevator is fully operational and available for use following modernization. Measured as "maximum availability - down time/maximum availability - 100."
- c. Callback: Any request for service assistance related to the upgraded elevator system.
- d. Cleanliness: The Supplier is required to maintain the entire elevator system in a clean manner at all times. This includes but is not limited to: removal of oily rags-removal of dirt, grease, lint-maintaining the exterior of all equipment free of lint, dirt, oil, grease- clean all machine room equipment including, floors, controller/selector, governor, hoist machine, brake, sheave, hoist motor interior, deflector sheave, machine beams, car top, hoistway door track, hanger, interlock, header, strut, hoistway side of sills, spreader beam, entire counterweight, buffer, underside of car platform, car & counterweight guide, car safety, car door operator, track, hanger, inside area of header, crosshead, guide rail/bracket, fascia, dust cover, pit, inside car station/hall station/lantern and lobby panels. The cleaning must meet Elevator Industry Standards and shall be to the full satisfaction of (Member Name) and/or the third party consultant. If (Member Name) decides the cleaning level is below (Member Name) Standards, (Member Name) has the option of bringing in another elevator contractor to perform the cleaning (with notice provided per the Contract). All costs of the cleaning by another elevator contractor plus the cost of supervision by (Member Name) shall be paid by the Supplier that is performing the Preventive Maintenance under this Contract.
- e. Contract: All work, referenced herein as Specification, Scope of Services, Project and Contract are included in this scope and will be agreed upon under the standard (Member Name) Terms and Conditions.
- f. Elevator: a conveyance that serves two or more landings or levels in a building or structure and includes, but is not limited to, passenger and freight elevators, wheelchair lifts, dumbwaiters and material lifts.
- g. Elevator Apprentice: A person who is indentured in a State approved elevator apprenticeship program and provides assistance to elevator maintenance, testing, and repair tasks as directed by a Licensed Elevator Journeyman. Assistant Mechanics who have a journeyman elevator constructor's license and are not in a State approved apprenticeship program do not qualify as "Resident Mechanics" or meet the of Licensed Elevator Journey mechanics.
- h. Elevator Contractor: A company licensed by the State of (State) as an elevator contractor who employs Licensed Elevator Journeyman and Elevator Apprentices and regularly contracts to perform maintenance, testing, repairs, and alterations to elevator equipment. (Hereinafter known as the Supplier).
- i. Entrapments: An out of service elevator with passengers in the cab requiring the Supplier or other emergency personnel to release the passengers.
- j. Licensed Elevator Journeyman: A person who has been adequately trained and has demonstrated an understanding of elevator systems and is licensed as such by the State of Oregon. The use of "Servicemen", "Technician", and "Mechanic" herein, shall be defined as a Licensed Elevator Journeyman, capable of

troubleshooting and responding to callbacks independently.

- k. **Code Compliance:** Ensuring that all modernization efforts meet the latest ASME A17.1 and A17.2 safety codes, NFPA regulations, and ADA accessibility standards.
- l. **Obsolescence:** The condition in which an elevator component is no longer supported or available for purchase, necessitating modernization or replacement.
- m. **Performance Metrics:** The key criteria for assessing modernization effectiveness, including ride quality, response time, and operational efficiency.

Supplier expressly acknowledges that (Member Name) is relying on Supplier's professional expertise in performance of Services to achieve and maintain the intent of the scope of services.

II. REQUIREMENTS

Scope of Modernization Services

The Supplier shall provide all labor, materials, project management, and engineering necessary to modernize the elevators listed in Attachment A. The modernization process shall include but is not limited to:

1. **Controller Upgrades:** Replacement of existing control systems with state-of-the-art microprocessor-based controllers to improve dispatching efficiency, reliability, and compliance with current safety codes.

All modernization components shall be non-proprietary. Supplier must confirm that control software, diagnostic tools, and components are accessible to the Member and future vendors.
2. **Door Operator Replacement:** Installation of new, high-performance door operators to ensure smooth and energy-efficient operation, along with updated safety sensors and edge protection.
3. **Cab Interior Renovation:** Replacement or refurbishment of interior finishes, handrails, ceiling lighting, and flooring to enhance the user experience and aesthetics.
4. **Safety and Accessibility Enhancements:** Updates to meet ADA compliance, including the installation of tactile buttons, audible signals, and automatic door reopening devices.
5. **Energy Efficiency Improvements:** Integration of energy-saving features such as regenerative drives, LED lighting, and standby power modes.
6. **Hoistway and Machine Room Upgrades:** Modernization of hoistway components, including door locks, tracks, and electrical wiring, as well as upgrades to machine room lighting and ventilation.
7. **Electrical Coordination:** The Supplier shall coordinate with the responsible party for electrical work, which may be an electrical contractor or the Owner's Facilities team, to ensure proper electrical support for the modernized elevator system. This includes confirming availability of required disconnects, dedicated circuits, conduit, grounding, and lighting as needed to meet code and equipment specifications.

Commented [KD1]: Reflects the need for non-proprietary systems to ensure cross-vendor compatibility.

8. **Compliance Testing & Certification:** Conducting final system testing and obtaining necessary permits and approvals from regulatory authorities.

Supplier shall reference and, where applicable, align modernization strategies with national elevator reliability standards or equivalent for long-term system performance.

Commented [KD2]: References aligning to a national standard equivalent for reliability.

Commented [KD3R2]: Still need to provide an example of a national reliability standard.

Performance & Acceptance Criteria

The Supplier shall ensure that the modernized elevators meet or exceed the following performance requirements:

- **Rated Speed:** Modernized elevators shall operate at their designed speeds within allowable tolerances.
- **Ride Quality:** Acceleration and deceleration shall be smooth, with minimal vibration and noise.
- **Response Time:** Improved response times and reduced wait times for passengers following modernization.
- **Safety & Accessibility Compliance:** All modernization upgrades must adhere to the latest safety and accessibility regulations.
- **Downtime Minimization:** The Supplier shall coordinate the modernization schedule to minimize disruption to building occupants and ensure timely project completion.

Project Deliverables & Documentation

1. **Modernization Plan:** A detailed project schedule outlining all modernization activities and anticipated completion dates.
2. **Equipment Documentation:** Technical specifications, warranties, and operating manuals for all new components installed.

Member Name shall have the right to request and review relevant specifications used by other campuses to support standardization across locations.

3. **Compliance Certifications:** Documentation proving adherence to applicable safety and accessibility codes.
4. **Final Performance Report:** A report detailing the post-modernization performance metrics compared to pre-modernization benchmarks.

Commented [KD4]: Calls out the right to share information across campuses from the supplier. This is already included as this is part of an overall UC Health contract, but this specifically calls out the need for cross-campus alignment.

Commented [KD5R4]: This could be removed if it is determined to be redundant.

Commented [KD6R4]: Decided to keep it in for clarity.

Supplier Responsibilities

- Provide trained and certified personnel to perform modernization work.
- Maintain a safe work environment and comply with all OSHA and local safety regulations.
- Conduct thorough inspections and testing after modernization to ensure compliance with specifications.

- Provide training for building staff on the operation and maintenance of modernized elevator systems.

This Scope of Work ensures that the modernization process enhances elevator performance, meets current safety and regulatory standards, and provides a long-term, cost-effective solution for building owners and operators.