



REQUEST FOR PROPOSAL  
OF FACILITY SOLUTION PROVIDERS FOR  
FACILITY MANAGEMENT SOLUTIONS

RFP Submission Date  
On or Before  
12:00 p.m. CST  
April 4, 2024

# Lake Ridge Schools

## REQUEST FOR PROPOSAL OF FACILITY SOLUTION PROVIDERS FOR FACILITY MANAGEMENT SOLUTIONS

### **A. GENERAL BACKGROUND AND PROJECT GOALS**

#### **A1. Purpose**

The Lake Ridge Schools request proposals for the identification, design, and implementation of a Facility Management Plan for a performance-based facility management services (janitorial, landscaping and HVAC maintenance) in accordance with Indiana Code 5-22-7.

The Lake Ridge Schools purpose for issuing this Request for Proposal (RFP) is to identify and select a qualified provider, or Facility Management Provider to perform the implementation of janitorial, landscaping and mechanical services at all Lake Ridge County School facilities with a focus on cost reduction.

Suppliers shall be able to provide comprehensive facility cleaning and janitorial services, HVAC preventative services, landscaping services, building management and energy services, including, but not limited to, the performance of energy audits, maintaining mechanical equipment, capital planning, landscape planning and design, identifying energy conservation measures, facility cost savings measures, ongoing support and training services, assistance in securing financing for potential future transactions, and accountability for facility performance and cost of operations savings.

Responses to this RFP should be technically creative regarding modernization, HVAC management, janitorial management, landscape management, energy management, maintenance, training, and overall quality of service.

#### **A2. Overview of Goals and Objectives**

The Lake Ridge Schools expects to achieve the following goals and objectives by entering into a guaranteed facility services contract with the selected provider:

1. Reduce operating costs to reinvest in deferred maintenance areas.
2. Improve environmental conditions for school employees and visitors to school facilities.
3. Improve maintenance and operation of the facilities.
4. Provide better working conditions in the identified facilities.
5. Preserve capital funds for other school needs.
6. Provide quality cleaning and janitorial services in a full-service fashion.
7. Provide landscaping services to ensure professional appearance and safety.

#### **A3. Included Facilities**

The Lake Ridge Schools desires to implement the Facility Janitorial and HVAC Management at the following locations:

Facility	Address	Square Footage
Admin. and Education Center	6111 W. Ridge Rd. Gary, IN 46408	64,212
Calumet New Tech High School	3900 Calhoun St. Gary, IN 46408	178,147
Lake Ridge New Tech Mid. School	3601 West 41st Ave. Gary, IN 46408	110,419
Longfellow New Tech Elem. School	4500 Calhoun St. Gary, IN 46408	53,976
Concessions & Locker Rm. Bldgs.	3900 Calhoun St. Gary, IN 46408	2,000 each

Buildings can be added and removed at the discretion of LRS administration prior to execution of a contract.

A Research Information Packet outlining current facility data and related information:

- Historical Operation’s Fund Expenditures for 2021, 2022, 2023
  - Current Operation’s Staff Employee Data (wages, benefits, years of service)
  - Building Floor Plans with square footage, # of restrooms, etc.
  - Pertinent mechanical information
- for each facility can be obtained by contacting Adrian Wilkerson – CFO at [awilkerson@lakeridgeschools.net](mailto:awilkerson@lakeridgeschools.net) or via the LRS website.

Potential respondents must attend the Mandatory RFP Preview Meeting to be eligible to respond to this RFP. The date is April 2, 2024. Meeting will be conducted on-site at 11:00 AM CST at the Administration Center at 6111 W. Ridge Rd. Gary, IN 46408.

Potential responders may arrange to view the facilities additional times by scheduling an appointment with Adrian Wilkerson, CFO, and various other LRS staff. Mr. Wilkerson will be responsible for lead on behalf of LRS for all scheduling and coordination.

Contact Name	Contact E-mail
1.) Adrian Wilkerson – Chief Financial Officer	<a href="mailto:awilkerson@lakeridgeschools.net">awilkerson@lakeridgeschools.net</a>

The Lake Ridge Schools, at their discretion, reserves the right to arrange group meeting(s) to disseminate information and view the facilities.

**A4. Qualification Process**

The selection of the qualified respondents will be based on the responses to the RFP and the ability of the provider to best meet the needs of Lake Ridge Schools. Lake Ridge Schools reserves the right to accept or reject any proposal based on its sole determination of its best interests. Lake Ridge Schools shall not be required to select any provider based on low cost, payback or other criteria. This RFP is not an offer to contract. Acceptance of a proposal neither commits Lake Ridge Schools to award a contract to any vendor, even if all requirements stated in this RFP are met, nor limits our right to negotiate in our best interests. Lake Ridge Schools reserves the right to contract with a vendor for reasons other than lowest price. After selecting a facility services provider, the Lake Ridge Schools intends to negotiate a Guaranteed Facility Management Contract Agreement with the selected provider no later than April 10, 2024.

**A5. Selection Process and Timing**

The following process will be used to select the preferred facility services provider.

Advertisement / Issuance of RFP	March 12 & 19, 2024
RFP Pre-Bid Meeting	April 2, 2024
Submission of Proposal	April 4, 2024
Contract Approval and Board Presentation	April 22, 2024
Facility Services Agreement Start Date	July 1, 2024

Tentative time frame subject to change at the discretion of Lake Ridge Schools.

**A6. Contact and Response Deadline**

In order to be considered, respondents must submit a complete and thorough response to this RFP. Original and 6 copies (total of seven (7) RFP responses must be submitted to the Lake Ridge Schools Administration Office on or before April 4, 2024, by 12:00 PM (CST). Responses must be sealed and clearly marked “FACILITY

MANAGEMENT PROPOSAL". All proposals will be opened in public on April 4, 2024, at 1:00 p.m. CST. All proposals shall include a non-collusion affidavit. The Corporation will review and submit a recommendation to the Board of Trustees on April 22, 2024 at its scheduled board meeting.

To ensure that your response is received before the deadline, either hand deliver or send submittal by registered mail to:

Adrian Wilkerson

Chief Financial Officer

6111 W. Ridge Rd. Gary, IN 46408

Mark "FACILITY MANAGEMENT PROPOSAL" clearly on the envelope.

### **A7. Response Preparation and Completeness**

An authorized representative of the offeror shall sign responses. All information requested must be submitted and organized in the format requested. Submission of e-mail, mailed or fax responses will not be considered and will result in elimination of a response otherwise received timely and in accordance with directions. Failure to submit all information as requested may result in the requester requiring immediate submission of the missing information within twenty-four hours from the requested notification, reducing the score for that component of the response and / or elimination of the respondent from consideration. Emphasis should be placed on completeness and clarity of content. Inclusion of unrelated or unrequested materials, which do not address the attached format, shall be considered unresponsive. Proposals received after the designated deadline will be returned unopened. Should such proposal(s) be opened inadvertently the school reserves the right to retain a copy for the files of the Lake Ridge Schools.

### **A8. Confidentiality**

Upon receipt, the proposals shall become the property of the Lake Ridge Schools. Ownership of all data, materials, and documentation originated and pursuant to the RFP shall be subject to public inspection in accordance with prevailing public access laws. Trade secrets or proprietary information submitted by an offeror must be so identified on each page on which it is found and shall not be subject to public disclosure. Lake Ridge Schools may obtain clarifications from the respondent or its contractors at any time.

## **B. REQUEST FOR PROPOSAL FORMAT AND SPECIFICATIONS**

Each company must provide a response to this RFP as detailed below. The response must include certification, under a registered professional engineer's seal, that the report uses reasonable methods of analysis, estimation, and commitment to service.

### **B1. Executive Summary**

Responses shall include a summary overview of the respondent's proposal, approach and other pertinent company information. Such summaries are to be no more than ten pages in length. The binding authority in the management of the firm must sign the summary overview.

### **B2. Company Qualifications and Financial Strength**

#### **Firm Profile**

1. Provide information specifying legal business classification, state of incorporation, audited annual report and summary of financial strength.
2. Address the company's ability to fulfill the financial guarantee terms and duration of the Facility Management Plan. Include a summary of the extent and stability of business operations related to installation services. Provide specific information for the last 10 years, if applicable.
3. If the firm is a factory owned branch, specify the legal business classification, state of incorporation and where legal contracts will be executed.

4. Respondent must have a current State of Indiana contractor's license and have been a contractor in the state under that license for a minimum of two years from the date of the issuance of this RFP. Provide copies of all State contractors' licenses.
5. Address the firm's representation or affiliation with the manufacturing or installation of any line of related equipment, which may be utilized in this project. Specify what that equipment is and how it may impact the project.
6. Address the firm's affiliation, joint venture, or contractual obligation to any peer partner, which may be used on this project.
7. Define what aspects of the proposal will be self-performed by company. Provide proof of company's ability to self-perform those aspects of the services with no subcontractors.
8. No such Party nor any of its Affiliates has been debarred or is subject to debarment and neither such Party nor any of its Affiliates will use in any capacity, in connection with the services to be performed under this Agreement, any party who has been debarred pursuant to Section 306 of the Federal Food, Drug, and Cosmetic Act, as amended, or who is the subject of a conviction described in such section. Each Party will inform the other Party in writing immediately if it or any party who is performing services hereunder is debarred or is the subject of a conviction described in Section 306, or if any action, suit, claim, investigation or legal or administrative proceeding is pending or, to such Party's knowledge, is threatened, relating to the debarment or conviction of such Party or any party performing services hereunder.
9. The proposer will provide written statement in the proposal that during a natural disaster or pandemic the company will meet and exceed any state, federal or CDC required guidelines.

### **B3. Project Team and Experience**

1. Provide an overview of the project team roles and responsibilities. Include concise resumes of company employees who will work on this project. Include resumes of a minimum of one (1) in-house Professional Engineers registered in the State of Indiana. Include copies of Professional Engineering licenses.
2. Include resumes of a minimum of one (1) in-house LEED AP professional. Include copies of LEED AP certification licenses.
3. Provide information on facility management capabilities with resumes of all staff who will touch this project.
4. Provide a listing of service and installation capabilities of your firm. Respondent must provide repair services available 24 hours a day and emergency landscaping services 24 hours a day.
5. Provide a reference list identifying at least three (3) customers with which the Qualified Provider has performed facility services work. This list should include the project name, location, size of the school district/facility, and scope of work.

### **B4. Insurance and Bonding**

1. Provide evidence that prior to award of contract the provider shall be able to provide a 100% project value performance bond for its faithful performance of the project. All subcontractors must have a clean work history and ability to provide a bond.
2. As an indication of your firm's financial stability provide your firm's cost of performance and payment bond per thousand dollars of contract value.
3. Provide evidence that prior to award of contract the provider shall be able to provide and maintain for the life of the contract insurance in the amounts of:
  - A. Commercial and general liability in amount not less than \$1,000,000 each occurrence.
  - B. Comprehensive automotive liability in amount not less than \$1,000,000 each occurrence.
  - C. Workman's compensation insurance not less than \$1,000,000 each occurrence.
  - D. Excess liability not less than \$3,000,000.

### **B5. Technical Approach & Scope of Work**

1. Responses should include a detailed approach to meeting the goals and objectives for the facilities. Provide a measurement and verification plan, including the plan for execution identifying responsible parties. Provide an overview of the technical approach that is used to identify, evaluate and recommend cost savings measures for Lake Ridge Schools.
2. Provide a detailed list, by facility, of the proposed janitorial, landscape and HVAC maintenance and conservation measures.

3. Provide a summary of the overall project recommended, detailed scopes of work, the total project savings, total project cost.
4. Provide a brief technical description of each of the proposed technical measures and basis for savings calculations.

## **Janitorial Maintenance**

1. The term of this contract shall be from July 1, 2024, through June 30, 2027 (3-years) with the option to renew annually at the listed price for additional years plus the annual CPI for janitorial services. The proposed costs shall include all fees, expenses, labor, insurance, taxes, overhead, profit, and any other related costs.
2. The successful proposer will provide all necessary and properly trained labor, proper materials, supplies and serviceable equipment & tools that comply with all federal, state, and local laws, requirements and rules at all levels of jurisdiction to perform services as described in this RFP. The proposer will satisfy all requirements to maintain the high standards of cleanliness, health and sanitation in all LRS schools and facilities. Custodians may be required to occasionally perform minor maintenance tasks as needed which may require the use of manual or powered handheld tools. The specifications herein should be referred to as a guide for, rather than a limitation to, the proposer to maintain the cleanliness of LRS schools and facilities.
3. It is the intent of these specifications to describe custodial service requirements for all LRS facilities (list detailed above). The primary objective is to provide a safe, healthy, pleasant learning and work environment. This environment must be maintained throughout the building and its immediate grounds in all variations of weather and occupancy. The scope of services includes, but is not limited to inspecting, reporting, surface cleaning, deep cleaning, cleaning of body fluids, sanitizing, dusting, vacuuming, scrubbing, shining, polishing, cleaning restrooms, classrooms, administration, instruction areas and portable classrooms, and removal of debris/trash daily. Items such as restrooms, sinks, walls, carpet, windows, vents, doors, furniture, and fixtures must be properly and thoroughly cleaned.
4. APPA Performance Standards. As used herein, "APPA" shall mean the educational facilities organization formerly known as the Association of Physical Plant Administrators, which, at a minimum, establishes the industry standards of cleanliness and staffing. Proposer agrees to provide the Custodial Services generally in accordance with the following APPA level standards: (a) APPA level two (2) custodial services for all primary, general public common areas and bathrooms at the Facilities within the scope of services set forth in this Agreement. Assessments of performance of the Custodial Services shall be performed on a quarterly basis, or such other schedule as the Parties may mutually agree, with any corrective actions or modifications to be mutually agreed by the Parties. LRS requires APPA Level 2 – Ordinary Tidiness.
5. General cleaning services to include but not limited to, empty waste receptacles and replace liners daily, sweep floors and baseboards, vacuum carpets, dust mop and wet mop floors, trash removal. Clean and sanitize counters, desks, doorknobs, light switches and sinks, Graffiti removal, scrub, strip, buff and seal floors, replenish paper towel, toilet paper, and hand soap. Clean walls, partitions, and all other contiguous surfaces. Dust and wash columns, doors, and doorframes. Clean carpets twice yearly at minimum or if requested by LRS designee. Spot clean carpets as needed. Wash windows, clean ceiling areas, overhead pipes, wall fans, pictures, plaques, wall or ceiling diffusers, file cabinets, bookcases, etc. Scrub and clean restrooms. Trash pickup and removal from grounds area.
6. Athletic event cleanup will be part of this comprehensive plan. Schedule of events for the up-coming school year will be provided at the Mandatory Pre-Proposal meeting on April 2, 2024.
7. Annual cleaning for all schools: (Note: Annual summer cleaning services are to begin immediately following the end of each school year and be completed no later than 3-5 days prior to the start of the school year or at the request of the LRS administration).
  - a. Completely strip or scrub tile and refinish composition floors on all hallways (Coats reg 6) cafeterias (Coats reg 6), media centers (Coats reg 6), administrative offices (Coats reg 6), counseling offices (Coats reg 6), teacher offices/workrooms (Coats reg 4) all classrooms (Coats reg 6).
  - b. Wash all windows and glass partitions on the inside and outside (reachable by extension pole).

- c. Custodial staff to notify the LRS designee of all needed repairs at the end of each day or sooner if appropriate.
8. The services provided by the successful proposer must comply with all applicable federal, state, county and local jurisdictions and all Indiana Occupational Safety and EPA regulations, including such established procedures for handling the cleanup of blood borne materials and cleaning industry management standards, as well as any local requirements from LRS.
9. The successful proposer shall be responsible for compliance with all applicable federal and state laws, codes, and regulations, including but not limited to OSHA and the Right-to-Know.
10. Proposer shall provide services under this agreement as an independent contractor. Proposer and its supervisors, agents, and employees shall directly control the performance of the work. Proposer shall be solely responsible for compliance with all State and Federal requirements related to the individuals performing services under the contract, including but not limited to those regarding wage payments and non-discrimination in terms and conditions of employment.
11. LRS reserves the right to refuse and reject a subcontractor who does not meet the qualifications to perform this agreement. The subcontractor will be equally responsible for meeting all requirements specified in the request for proposal.
12. In submitting a proposal, the proposer agrees not to use the results as part of any commercial advertising without prior approval of LRS.
13. All proposers must disclose the name of any officer, director or agent who is also an employee of LRS. Further, all offers must disclose the name of any LRS employee or board member who owns, directly or indirectly, an interest of 5% or more in the proposer's firm or any of its branches.
14. All proposers must consider retaining all current and qualified LRS employees.
  - a. Current employees will follow the same on-boarding requirements as stated in item #15.
15. The successful proposer's custodial staff assigned to LRS must meet the following requirements.
  - a. Must be at least 18 years of age.
  - b. U.S. citizen or authorized to work in the U.S.
  - c. Complete a criminal background screen, paid for by the proposer, as required under Indiana law and in accordance with procedures established by LRS Division of Human Resources. Must be completed for all employees including substitutes, short term or sub-contract personnel that will be working on any LRS property.
  - d. Ability to communicate effectively regarding job performance and procedures; use courteous language.
  - e. Inspect and report maintenance needs to the project supervisor and/or the building administrator.
  - f. Interact positively and appropriately with students, school employees, and the public.
  - g. Work productively with minimal supervision.
  - h. Punctual and well trained in the area of work assigned.
  - i. Alcohol and drug free when arriving for and while on duty. Proposer's employees are prohibited from the manufacturing of, being in possession of, using, distributing, or dispensing of any controlled substance, including alcohol, while on school grounds,
  - j. Well-groomed and in uniform provided by the proposer with the employee badge clearly visible on the uniform.
  - k. Proposer's employees working during school hours must adhere to established school rules.
  - l. All employees of the proposer are to present themselves in an appropriate manner and in attire consistent with the LRS policies and administrative guidelines. LRS reserves the right to seek removal of a contract employee failing to meet these requirements. In addition, LRS reserves the right to request that the proposer remove any employee from the LRS contract for unsatisfactory performance. If the LRS designee notifies the proposer that any of its employees assigned to LRS



are incompetent, disorderly, or otherwise unsatisfactory, the proposer will remove and replace such employee within one (1) shift and will not assign that employee to work in LRS schools/buildings without the written consent of the LRS designee.

16. At no time shall the successful proposer's custodial staff do any of the following.
  - a. Leave custodial closets open and unattended.
  - b. Leave products or equipment unattended.
  - c. Congregate or have food/drink in unauthorized areas.
  - d. Disturb papers on desks.
  - e. Open drawers or cabinets.
  - f. Use telephones or computers or tamper with personal property owned by LRS staff or students.
  - g. Leave lights on in unoccupied sections of the facility.
  - h. Leave doors open in unattended sections of the facility.
  - i. Play radios or similar devices, at a volume that is audible in other areas of the building.
  - j. Smoke or use any tobacco products on LRS property.
  - k. Use profanity.
  - l. Consume alcoholic drinks on LRS property.
  - m. Consume, use, manufacture, distribute, possess on person or in vehicle any form of controlled substance, paraphernalia, or prescription drugs that are prescribed or intended for someone else.
17. Proposer shall submit the training process, procedures for the custodial staff pre-work assignment and on-site continual training, training incentives and details regarding the process for on-site staff supervision including management features, including organizational chart.
18. It will be the successful proposer's responsibility to ensure that its employees are trained and use the equipment, tools, and supplies in a safe and orderly manner and in accordance with the manufacturer's instructions and guidelines and within all local, state, and federal regulations.
19. The successful proposer shall be responsible for instructing its employees in safety measures considered appropriate. Personnel will not place or use mops, brooms, or any equipment in traffic areas or other locations in such a manner as to create safety hazards. The workers shall provide, place and remove appropriate warning signs for wet or slippery areas.
20. The successful proposer's custodial staff will be required to have training in areas such as school lock down, alarms, bodily fluid clean up, and sexual harassment.
21. The proposer will be trained to secure buildings and set alarms. The proposer will be responsible for conducting the training for its staff with assistance from LRS.
22. The successful proposer will be required to allocate experienced and trained staff per school based on Full-Time Equivalent (FTE) of 30,000 sq. ft. of cleanable space for that school as a maximum rate. The proposer shall perform the services set forth in this agreement at time periods as approved by the LRS designee. The safety of the students, staff and unimpeded delivery of instructional programs will determine the authorized work periods. The proposer will provide a weekly staffing update every Monday which includes, full name, hire date, title, location, shift, weekly hours scheduled, open positions listed by school with shift and weekly hours listed.
23. At least one (1) day porter will be required for each school to work during the normal school day. They will assist with cleaning spills, cafeteria, continual restroom cleans office cleaning in secure locations, and more.
24. The successful proposer must maintain a pool of trained and qualified custodial staff substitutes with the required background checks, available at short notice, to ensure that the LRS is adequately staffed in the event of illness or injury. If substitutes are not available, the proposer will automatically authorize the use of OT on an hour for hour basis at the proposer's expense.

25. Proposer must submit a written explanation of the responsibilities of each head custodian related to their porter/leadership role, which includes the head custodian specific cleaning obligations.
26. The successful proposer is required to inform the building principal and the LRS designee when there will be a change of an employee for transfer purposes at least 48 hours before a new employee is placed in any LRS school.
27. The notification shall include the name, current address and contact information of the intended employee. LRS requires that all employees under this agreement to have a criminal background investigation and be enrolled and in compliance with E-Verify.
28. The successful proposer shall notify LRS immediately of conditions such as illness or injury that will limit hours or decrease the number of personnel assigned to the daily work crews. In addition, the proposer shall notify the LRS designee in advance of any condition or situation that will affect the performance of the work under this agreement. In either case, the proposer shall communicate how the affected work will be rescheduled.
29. Proposers will submit proposed work schedules that will accommodate the daily, evening, and after school needs of LRS. Include details regarding staffing, arrival/departure times, and duties to be performed, including cleaning parking lot and removal of trash from outside trash cans daily. Work shall be performed on a normal five (5) day week schedule, Monday through Friday. Proposer employees will work in line with LRS calendar or as requested or specified by LRS. The successful proposer shall adjust the schedule of duties due to the hours of LRS employees and classroom instruction periods. No work is to be performed during the normal school hours that may interfere with the general operations and functions of the students and school.
30. Proposer must submit and describe its supervision model and procedures in detail, including organizational chart.
31. All costs associated with obtaining a national criminal background check shall be the responsibility of the successful proposer.
32. The successful proposer shall be responsible and liable for the safety, injury, and health of its personnel while they are performing services for the LRS.
33. The proposer must submit a list of equipment used to perform all custodial services. The list should include the model name and number of equipment, approximate age of equipment and routine maintenance schedule.
34. The procurement and maintenance of all equipment, supplies, materials, and chemicals for the successful execution of this contractual obligation shall be the successful proposer's responsibility except as may be determined by LRS (e.g., entrance mats, security systems, locks, etc.).
35. The successful proposer shall post a list of supplies, with minimum requirements, at each school and will be responsible for checking supplies daily. All supplies shall be replenished as needed.
36. Chemicals and equipment must meet or exceed Occupational Safety and Health Administration (OSHA) requirements and commonly recognized safety requirements. The successful proposer shall be responsible for maintaining Material Safety Data Sheets (MSDS) on each job site for all chemicals used in the cleaning process.
37. The successful proposer will provide a chemical inventory of all chemicals requested to be used in LRS schools and facilities for review and acceptance by LRS. The list should include chemical brand name, mfg. model number, packaging, intended use and cost.

38. The successful proposer shall maintain equipment to present a neat appearance, be free from hazards, and to perform in a "like new" manner. All cleaning equipment shall be cleaned after work is completed each day.
39. The successful proposer shall provide consumable supplies to perform all work functions. Consumable supplies include but are not limited to: paper towels, toilet paper, trash bags, floor seal, finish, stripper, detergents, disinfectants, foam hand soap with dispensers (where designated), rags, carpet shampoo, mops, mop buckets, dust mops, brooms, brushes, and wringers. All consumable supplies must meet LRS approval. Hand sanitizer shall be provided by LRS and distributed according to LRS policy for use.
40. The successful proposer shall drop ship supplies to each school/facility and have it signed for by a LRS representative (principal, secretary or site custodian). Receipt will be in triplicate; one copy to be retained by the school, successful proposer will retain one copy and one copy to the LRS designee.
41. All LRS facilities are typically closed on state and federal holidays. However, there are occasions when schools host events on these holidays that will require custodial service coverage. Any additional fees or charges should be indicated in the RFP response. If no additional fees or charges are indicated, services will be considered included with quoted fees.
42. LRS reserves the right to change any, and all, of the work scheduled with advance notice to the successful proposer.
43. Scheduled breaks and summer cleaning shall be coordinated with the LRS designee. The schedule is to be developed with the goal of minimizing interference with any scheduled instructional activities or with contracted work being performed by others.
44. The successful proposer will be responsible for furniture setup and breakdown, during regularly scheduled shift hours, for extra- curricular activity needs, sporting events, or rental agreements that occur at school sites. At the middle and high schools, these events are numerous and may occur after school hours, on weekends and during school holidays. The proposer will be responsible to open and prepare the buildings for scheduled use on a Saturday or Sunday. Periodic special events will require the proposer to modify the cleaning schedule to accomplish setup and breakdown of those special events (i.e., parent teacher conferences, a play in the auditorium, awards ceremonies, home sports games, etc.). The proposer may choose to schedule support clean up on the day after the event if the delaying of the cleanup does not detract or interfere with the overall look or environment of the school facility.
45. The proposer must submit a proposed stripping and waxing description of service. Include details regarding the application process, products used, and number of coats applied, agreed upon by LRS.
46. The successful proposer must have a complete working knowledge of, and must comply with, all of the following:
  - a. All other applicable federal, state, and local laws, codes, and regulations
  - b. Ensure that any substances defined as hazardous by state or federal law are properly labeled and delivered or used in a way that does not violate state or federal laws.
47. Materials shall be stored neatly and secured in areas designated by LRS. School storage space will be provided, if available, at each individual school. This may include but not limited to storage containers, pods, etc. LRS shall assume no responsibility for loss or damages of stored materials, chemicals and equipment. Damage to the LRS storage facilities shall be the responsibility of the successful proposer.
48. Any requests for changes to the chemical inventory list must be submitted, in writing, with the MSDS and rationale supporting the change to the LRS designee for consideration.

49. The successful proposer warrants that the products and services supplied to LRS conform in all respects to the standards set forth in the Occupational Safety and Health Act of 1970, as amended, and the failure to comply with this condition will be considered as a material breach of contract.
50. LRS will provide workspace and/or storage space for supplies and equipment in each school. All combustible materials including, but not limited to, solvents, propane, gasoline, etc. must be stored outside in a secure and locked area; a minimum of 50-feet from any building structure.
51. The successful proposer may utilize janitor closets in each school, where available. The janitor closets must always be maintained in a neat and sanitary condition. Mops shall be clean and hung to enhance drying; mop buckets shall be empty and clean when stored. **AT NO TIME SHALL THE PROPOSER INHIBIT ACCESS TO FIRE EXTINGUISHERS, FIRE CONTROLS, ELECTRICAL CONTROL PANELS, ENTRANCES & EXITS, SAFETY EQUIPMENT, DEFIBRILLATORS, OR OTHER EMERGENCY AREAS/EQUIPMENT.**
52. The successful proposer shall maintain a cell phone service with local or toll-free service to LRS. The proposer will not be allowed to use LRS telephones, copiers, faxes, printers and/or building appliances unless approved by a specific LRS location on a case-by-case basis.
53. The successful proposer shall coordinate and schedule custodial staff to complete the daily work. The work shall be planned in conjunction with the school principal to minimize the disruption of school operations. One of the proposer's most important customers will be the building principal. To ensure customer satisfaction, the proposer's employees will be required to maintain regular, open communication with the building principal.
54. The successful proposer shall perform periodic inspections of all facilities under this contract and confer with the principal and LRS designee to set up and maintain the facility in an acceptable state of cleanliness and sanitation. Monthly inspection will include Principal/designee, successful proposer's Director, Zone Leader, Head Custodian and LRS designee. Quality Assurance technology must be included and described in the proposers RFP response that explains the schedule of reporting and information included.
55. The purpose of inspection is to ensure tasks are completed according to the approved cleaning standards and frequency requirements and that the quality of work is satisfactory and confirm the proposer's compliance with other terms of the agreement. In addition, an inspection of all schools will be conducted prior to each school year.
56. The inspection requirement is not intended to limit the proposer's responsibility to inspect or control his own work, nor does it limit the LRS's right to inspect any building at any time. Inspections are to be conducted with the LRS designee and other personnel as deemed appropriate by LRS.
57. The LRS designee and the principal may also report any deficiencies and unsatisfactory performance to the proposer. The proposer will be granted a reasonable time to correct the deficiencies, agreed upon by LRS. The Quality Assurance technology must have a mobile and electronic work order system for processing all requests.
58. LRS reserves the right to inspect any or all facilities serviced by the successful proposer at any time with or without the contract manager, building supervisor or representative of the proposer. Monetary deductions will be made from monthly billings whenever violations are observed and documented at each location per the NON-COMPLIANCE AND DEDUCTION TABLE. (ATTACHMENT B).
59. Proposers must submit a sample inspection checklist and process for monitoring the completion and quality of completion with RFP response. Sample should include daily weekly, monthly, semi-annual, and annual inspection checklist for all LRS facilities that will be processed through the electronic, cloud-based quality assurance technology.

60. Guns, knives, or other weapons are not allowed on LRS property.
61. The successful proposer's employees working after normal school hours shall secure and keep all outside doors and windows locked while performing their duties, keep fire doors operable, and monitor unauthorized entry. The Proposer's employees shall report any facility related issues to the principal or site manager immediately. Proposer's employees shall, upon completion of work, secure doors and windows and turn off general lighting.
62. The successful proposer's employees may be asked to lock or unlock specific doors at the times specified by the LRS designee and may be asked to assist with lock downs and fire drills.
63. The successful proposer is responsible for the security of the building during the cleaning operation.
64. The successful proposer shall secure the building at the end of each shift and set the alarm (secure all doors, turn off all but designated lights, turn off ceiling fans, and secure all windows).
65. Office, classroom, and other doors are to be unlocked and opened only during the time that cleaning is being performed. All doors are to be relocked as soon as the service has been completed.
66. For the safety of students and the public at large, storage and custodial closet doors are to be closed and locked when not in use.
67. Each school that is protected by an electrical surveillance (security) system will have the process and procedures to arm and disarm the system provided to the successful proposer's day custodians and night crew supervisors. Security system codes will only be provided to employees essential to have them.
68. The successful proposer will ensure the school/building alarm systems are deactivated and appropriate outside doors are unlocked each morning by the time specified, Monday through Friday, by the LRS designee. The proposer's night crew supervisor must ensure that all doors and windows in the school/buildings are locked. The proposer's night crew supervisor must make sure the building is vacant and the alarm system is activated (armed) before leaving the premises.
69. Outside doors must be checked to ensure that they can be locked by the end of the business each day. Problems encountered locking any exterior door must be called in to the LRS designee immediately.
70. During the normal school day, problems with the security system should be reported to the principal. After school hours, the night crew supervisor shall immediately report the problem to the LRS designee, if the problem cannot be corrected and the alarm system set.
71. LRS shall provide the successful proposer with keys and alarm codes for each school and administrative building. Keys and alarm codes will not be shared among the proposer's employees.
72. Notification to the LRS designee shall be immediate with the reassignment or termination of any individual who has been assigned an alarm code; previously assigned alarm codes must not be forwarded to any of the proposer's new employees.
73. At no time shall copies be made of any keys issued. If additional keys are needed, the successful proposer must obtain keys from the LRS designee. All lost building keys assigned (whether interior or exterior), must be reported to the LRS designee within 24 hours of the loss. It is prohibited to lend LRS building keys to anyone and to leave key rings in closets, lying on custodial carts, etc. Keys must always be in the possession of the proposer's custodial staff. All keys assigned shall be returned to the LRS designee when the proposer's employee services in an assigned school end. All keys shall be returned to the LRS designee at the termination of this agreement.
74. The successful proposer shall inform the principal and the LRS designee of any vandalism, evidence of attempts to force entry, and all other damages to any buildings. The proposer's employees shall report,

in writing, any items that require maintenance or repair that are discovered during the process of this agreement.

75. Communication is critical when maintaining multiple school campuses. The successful proposer will be responsible to provide the LRS designee with an emergency contact person and telephone number for each set of building workers. If the need arises for the LRS designee to contact one of the proposer's employees at a large site, there must also be a system in place to accomplish this task. Therefore, LRS will require a cell phone system, radio system, or other acceptable communication system to be in place to contact the custodial staff at all LRS locations.
76. LRS shall provide the successful proposer with all normal utilities required for cleaning of buildings, excluding telephone service, necessary for performing this contract (electricity, water, gas). Upon written request from LRS, the successful proposer will comply with energy conservation requirements initiated by LRS. No custodial supplies are to be stored in these areas. LRS shall define any exceptions. In the event of failure or trouble noted in any such area, the matter must be referred to the school principal. During evening cleaning operations, lights will be off except in the area in which actual cleaning is taking place.
77. Every effort shall be made to conserve energy whenever possible throughout the cleaning schedule. Only areas in use shall have lights on and doors and windows shall remain closed whenever the heating or cooling systems are operating.
78. The successful proposer's night cleaning must be undertaken after normal office/school hours. Normal school hours are from 7:00 a.m. to 4:30 p.m. From time to time, the school building or part thereof, is used for meetings or program fulfillment before and after normal working hours. It is the successful proposer's responsibility to perform all duties with the frequencies required by this contract regardless of the time vacated. Each principal is to provide a monthly activity calendar to assist proposer with cleaning schedule. Each school is to be manned daily by custodian(s) who are to keep the building neat and attractive by providing light cleaning and whatever other duties the successful proposer may assign. The custodian(s) shall be accessible during the entire school day. Morning work shall start no earlier than 6:00 a.m. All evening work shall start no later than one hour after dismissal and end, at a minimum, of 11:00 p.m. at all locations. Work hour schedules must meet LRS approval.
79. Proposer shall submit a proposed transition and implementation plan, which includes objective, milestones and timelines.
80. Scheduled events related to LRS rental agreements or administrative and staff needs, will be negotiated at a rate of no higher than the 1.5 times the amount of the hourly rate plus benefit costs of the proposer's assigned staff and will be negotiated at the time of the rental request is submitted.
81. Hours of service for events that extend outside of the regular shift schedule must be requested by the school, approved by office of support services prior to the event, and invoiced by the proposer separately from the monthly contract fee. Itemized bills should include the date of the service, hours worked, the employees who worked and the LRS designee who approved the service. Such billing must be submitted under a separate invoice but at the same time as the base contract invoice for the month within which the service was provided. The proposer may invoice LRS at the agreed upon rates for the extra work. Special Cleaning Requirements for a custodian being present during special events or activities sponsored by the school will not be considered a part of this RFP and resulting agreement. Please provide hourly cost for custodial service for work outside of the normal proposers shift schedule.
82. Cleaning services will be billed in equal monthly installments, as agreed upon by both parties, prior to signing of the agreement. Invoices must itemize charges of labor for each school. Invoices will be submitted by facility, one invoice per facility showing all fees and charges for that facility.
83. It may become necessary for the successful proposer to perform duties over and above the scope of work outlined in the agreement. Prior to performing such duties, the successful proposer will develop an

estimate of the cost of the work based on unit cost established within the proposal. This estimate must be approved by the LRS designee prior to work being performed.

84. Any work outside the scope of these specifications must be approved and assigned in advance by the LRS designee. Invoices for additional work must include the date and time of the work, the name of the school/facility, the type of work performed, the number of hours worked, and the name of the authorized LRS person who approved the work to be performed. Invoices for additional work performed are to be sent to the established billing address along with the regular monthly invoice for processing but are not to be included on the regular monthly invoice.
85. LRS will not consider any other price increases during the term of the agreement, including extensions, unless one or more of the following occur:
  - a. LRS requests a change in the scope of the project, the cost of which exceeds five percent (5%) of the total contract price.
  - b. LRS significantly increases the cleaning frequency requirements.
  - c. A federally mandated minimum wage increase is enacted during the term of this agreement. If this occurs, the proposer will have the option to negotiate the amount necessary to cover the increased payroll costs. Any requested increase must be justified by a copy of the current payroll identifying those employees who are below the new minimum wage standards and the amount required to enable them to meet the new minimum wage standards. The proposer shall notify LRS, in writing, at least 90 calendar days before any price increase.
  - d. If LRS closes a building during the term of this agreement, the contract will be reduced by the amount proposed on the proposal form.
  - e. If LRS reduces the scope of the work by more than 30,000 square feet during the agreement period, the agreement price shall be reduced proportionally. Additionally, LRS reserves the right to negotiate reductions in frequency and/or scope to reduce costs if it deems necessary. Such reductions shall be agreed upon by both parties.
  - f. Prices will not be the sole determinant for the award, competitive proposals will be evaluated based upon criteria formulated around best value, which may include among other criteria: price, quality, performance references, financial information, and the ability to successfully supply services or commodities. An agreement will be awarded to the responsive and responsible proposer whose proposal meets the requirements, specifications and contract terms contained in the RFP.
  - g. If there is a discrepancy between the unit price proposed and the extension, the unit price shall govern. Proposers shall not be allowed to take advantage of errors, omission, or discrepancies in the specifications.
86. Any deviations to the above specific terms must be stated and written documentation clarifying any such nonconformity must be submitted with proposal response.

## **Landscaping Maintenance**

### **1. Turf Maintenance**

#### **A. Mowing**

Lawn areas are to be always cut and have a manicured appearance; Mowing shall NOT be based on a specific number of cuts per calendar year to allow for additional mowing based on regional weather conditions but will generally follow a schedule as follows:

Lawn areas to be mowed weekly during the typical growing season and monthly during the dormant period; those periods will vary depending on the type of turf grass species encountered.

Turf areas should be inspected before mowing occurs, especially during rainy seasons for unfavorable mowing conditions. If turf areas are damaged due to rutting or any other negligence on the part of the vendor, repairs and replacements will be at the cost of the vendor. Prior to mowing, remove all trash and debris from lawn areas.

Height of the cut will also vary based on turf species. Unless otherwise directed by LRS, Bermuda, Zoysia, and Centipede are typically mowed at 1 to 2 ½ inches and St. Augustine and Fescue are typically mowed at 3 ½ to 4 inches. During the typical growing season lawns shall have no more than 1/3 of the leaf blade removed during a single cutting.

Grass clippings and landscape debris shall be removed from the front of the leasing office, common amenities, pool decks and other high traffic locations immediately after work in those locations has been completed.

All collected debris must be removed from LRS properties unless arrangements are made and approved by LRS. Clippings and debris shall not be placed in community compactor or dumpsters without approval, and then Landscape Contractor may not fill to containers more than 1/3 capacity.

#### **B. Edging and Trimming**

Landscape Contractor to edge all curbs, walkways, and bed edges during each mowing trip during the contract. All completed edges will have a perpendicular appearance between turf and hardlines, and turf and bed lines. An angled or beveled appearance of hardlines or bed lines is unacceptable. Grass must be trimmed level with the height of the mowers. Scalped turf around lawn objects is not acceptable.

#### **C. Equipment/Machinery Requirements**

Landscape Contractor may not use any piece of equipment or machinery that may cause damage to property or which is not deemed suitable for the site. Any damage to LRS property or property belonging to any LRS employee or guest shall be repaired/ replaced at the expense of the Landscape Contractor. Mower blades are to be sharpened so that clean cut is achieved. Cut quality deemed unsatisfactory must be corrected immediately.

### **2. Turf Chemical and Fertilization Program**

Lawns shall be maintained at a level no less than 95% weed and insect-free at all times. During growing season, the turf is to have a dark green color and maintain healthy root growth as well. This can best be established by consistent fertilization, use of high quality pre-emergent and post-emergent herbicides, insecticides and pesticides, and proper irrigation to turf areas. Specific fertilization and weed control schedules are as follows:

Soil samples are to be taken from various locations throughout the property so that a fair representation can be expected. Fertilization program may be altered as directed by needs identified in soil sample. Contractor is



responsible for adjusting improper pH by applying up to 50 pounds of lime per 1,000 square feet or up to 10 pounds of sulfur per 1,000 square feet as directed by a soil test yearly.

Greater than 95% effective control will be minimum acceptance for all pre-emergent herbicides. Split applications are made at the discretion and responsibility of the Landscape Contractor. Additional applications may be required should efficacy rate be deemed failure. Additional applications will be provided at no additional charge to the property.

Plant growth regulators (PGR) may be used to reduce the frequency of bed, sidewalk, and curb edging, to suppress seed head formation, and promote lateral discolor grass or paved surfaces. In event the PGR is not effective, Landscape Contractor will have to maintain areas mechanically as outlined in section I.

Landscape Contractor is responsible for maintaining accurate records of all chemical applications and distributing the information via copy of application(s) including MSDS to on-site management staff and LRS.

Landscape Contractor is responsible to place all notification as directed by local, state or federal law prior to any chemical application.

Landscape Contractor is responsible to replace all damaged landscape materials as a result of any chemical application.

Chemical Program efficacy/failure to be judged as follows:

- 95% chemical treatment effectiveness in all turf locations always is required. Penalties to contractor in reduced payment may result if authorized by LRS.
- Any vegetation in turf that is not desired and/or preferred lawn is defined as a "weed" and must be killed by the contractor. LRS reserves the right to adjust this definition as needed.
- Heavy "weed" coverage is greater than 5% of all lawn areas
- Poor growth
- Poor, inappropriate color
- Shallow root growth (and resulting in turf mortality)
- Substantial disease and insect presence, damage

### **3. Tree, Shrub and Groundcover Maintenance**

#### **A. General Maintenance**

Trees, shrubs and groundcovers will be pruned and maintained as needed throughout the growing season to encourage a healthy and natural appearance. Requirements will vary based on plant species, regional climatic factors, and approved fertilizer regimes. The LRS will provide as much information and guidance as required or requested, but the Landscape Contractor is responsible for providing all required care.

Tree limbs (up to 2" caliper) that are 15' from ground are required under this contract to be removed and hauled off property. Trees shall be maintained at a height to allow pedestrians to pass under them unimpeded (8'-0" minimum clearance) and in a manner such that building roofs and siding are not effected by tree branches (up to 20'-0"). Light posts and building lighting are to be always clear of tree branches so that maximum light penetration is assured.

All plant materials are to be maintained according to reasonable accepted industry standards in such a manner to promote the natural shape of the plant species. In addition, all plants must be 12"-18" off A/C units, meters, windows, foundations, and any other structure that would need that type of clearance for ventilation or access. Shearing, topping, pollarding and other severe pruning practices are discouraged. If in the opinion of the LRS

any landscape materials are maintained in a manner that destroys the value of aesthetics of the landscape, those materials will be replaced at the expense of the Landscape Contractor.

Spring-flowering plants shall be trimmed late in the summer after current blooms have faded and before new bud's form. Since many of these species, including Azaleas, Camellias, and Rhododendrons are formed on apical tips of branches, shearing is to be avoided. Deep hand pruning and/or structure pruning should be performed once a year during the dormant months. Structure pruning shall be defined as prune old wood behind multiple breaks to maintain proper proportions, promote interior growth, and an aesthetically pleasing appearance. Removal of up to 50% of the height and foliage of plants shall take place during dormant periods with the approval of LRS.

Perennials such as Hosta's, Daylilies, and others, must have all flower stems and spent blooms removed after the flower has faded. In late fall, all spent leaves are to be cleaned to the crown of the plant. Ornamental grasses are to be cut to the crown of the plant in late winter/early spring to encourage new growth. Clump-form groundcovers, such as Liriope, shall be trimmed annually to promote new leaf formation at the crown of the plant as directed by the LRS.

Landscape Contractor is responsible for inspecting plant material routinely for insects and diseases. Control is the responsibility of the Landscape Contractor and to be included in the monthly maintenance fees. Any unusual infestations, epidemics, or other problems that require additional charges over the monthly fee must be approved by the LRS before the work is completed.

## **B. Weed Control**

All tree wells, shrub beds, and groundcover areas are to be maintained weed-free at all times. Weeds shall be controlled in bed areas by mechanical, physical, and chemical methods. Use of pre-emergent as well as post-emergent chemicals is encouraged. However, pulling is required of all weeds 2 inches or greater in height or in areas where populations negatively affect the overall appearance of the landscape areas.

Because there are a wide variety of products, some with broad applications and others with very specific effectiveness in terms of target pests and host plants that can be treated safely, the Landscape Contractor may choose which products to use. Application and efficacy will be the sole responsibility of the Landscape Contractor.

## **4. General Maintenance Requirements**

### **A. Trash Removal**

As a part of each weekly maintenance visit, a general cleanup program will occur. The cleanup program shall involve a policing of all maintained areas for the removal of paper, cans, bottles, sticks, cigarette butts, leaves, and other debris. Also, a complete sweeping or blowing, by mechanical means, of the entire roadways, curbs, drains, and sidewalk areas will be performed. This will encompass complete removal of weeds at curbs and pavement lines, and other trash that has settled in these areas.

### **B. Fence Lines and Outer Perimeter Areas**

Fence lines, utility easements and undeveloped land adjacent to the apartment community may need periodic attention, including mowing, tree and bush trimming and removal, trash removal, etc. Leaves and debris accumulation along fences, behind residential buildings, and in common utilitarian areas are to be removed routinely. Fences should remain clear of vines unless directed by LRS.

## **C. Natural Areas**

Pine straw and leaves should be left to accumulate under the pine trees; All other materials, including pinecones, tree twigs and limbs are to be removed from these natural areas.

## **D. Seasonal Leaf Removal**

Leaf removal is required to be performed weekly through the peak months (Autumn and Winter) and as needed throughout the rest of the year during weekly visits. This applies to turf areas, ornamental beds, and all paved surfaces including parking lots, sidewalks, breezeways, and ground-accessible patios. Frequent visits for leaf removal are preferred as opposed to staying 2-3 days in a row one time a month. It allows the property to maintain a cleaner appearance and prevent heavy buildup that can cause damage to plant material by smothering. In addition, all debris associated with plant waste/clippings are to be removed from the property during each visit by the contractor. This will not be an additional charge to owner unless pre-approved by LRS.

## **E. Paved Surfaces**

All paved surfaces will be cleaned after landscape tasks are completed. Clippings may be blown from paved surfaces onto turf areas provided there are no clumps of clippings or trash left littering the landscape. All pavement seams are to be maintained weed-free, either by manually removing the weeds or by using a contact herbicide of the Landscape Contractor's choice. First floor breezeways and patios are to be considered paved surfaces and be maintained per visit.

## **5. Color Displays**

Beds should be fully grown in within a reasonable period of time (typically three to four weeks after install) and should remain healthy and vibrant throughout the growing season and until the next scheduled flower change. Quick action must be taken to cure any deficiencies resulting in poor plant performance. If plant vigor cannot be restored within two weeks, plants must be replaced. Any plants lost due to insects, fungus, or disease will be replaced at the cost of the Landscape Contractor. Owner reserves the right to withhold payment for flower beds that fail to meet the above requirements.

The Landscape Contractor is responsible for setting irrigation for optimal plant growth and shall submit said schedule to LRS for approval. Landscape Contractor should notify Owner immediately if repairs are needed so that the work can be approved and carried out quickly.

## **A. Site Conditions**

- Maintain proper hedge and shrub shape and trimming to maximize overall health of species
- Remove previous season's bedding plants as well as any leaves or landscape debris.
- Add 50 lbs. organic matter (such as Black Kow or other compost) per 50 sq. ft bed area. Check pH of the soil – 5.5 –7.0 considered ideal.
- Thoroughly till the beds to minimal depth of 14 inches with all amendments thoroughly mixed. Fertilizers should be raked into the top six (6) inches of soil mix.
- Install plants at proper spacing – normally 4-inch plants on 8–12-inch centers.
- Edge all beds and mulch with up to 1-inch layer of approved mulch material.
- Drench all flowers thoroughly with fungicide, iron-enriched root stimulator, and 10-30-20 liquid "quick-feed" fertilizer.

AMENDMENTS	DEPTH	RATE
<b>I. NEW BEDS:</b>		
Cow Manure	12" – 24"	50# / 50 sf.
Michigan Peat	18" – 24"	124# / 50 sf.
Finely ground Pine bark	18" – 24"	6 cu. ft. / 50 sf.
River Sand	18" – 24"	125# / 50 sf.
Fertilizer	6"	See Label
Lime	6"	As per soil test
Fungicide	6"	See Label
<b>II. ESTABLISHED BEDS:</b>		
Cow Manure	12" – 24"	25# / 50 sf.
Michigan Peat	18" – 24"	50# / 50 sf.
Finely ground Pine bark	18" – 24"	3 cu. ft. / 50 sf.
River Sand	18" – 24"	25# / 50 sf.
Fertilizer	6"	As per soil test
Lime	6"	As per soil test
Fungicide	6"	As per soil test

## B. Plant Selection

Plant material must be approved by LRS prior to install or Contractor may be responsible for any replacement material. Selected plant species will need to thrive in the microenvironment in which it is planted. Our greatest use of color is generally located along the street frontage of the facilities, in conjunction with property identification signs and community entrances, and front of leasing centers. Mass color is better viewed as traffic proceeds at 30-40 mph by most of these color beds. Elevation changes also increase visibility. LRS will approve final selections as well as the design of the beds. All bulbs shall be of a "Grade A" quality, meeting the following specifications.

## C. Aftercare

### 1. Spring Annual Application Schedule:

- 2 weeks after installation: Apply Surflan or other pre-emergent herbicide.
- Monthly: Apply Cleary 3336 fungicide and Mavrik and Merit insecticide. Halt applications when temperatures reach 90 degrees F.
- 8 weeks after installation: Drench flowers with subdue fungicide, Iron Roots 2 bio stimulant and 10-30-20 liquid fertilizer tank mix.

### 2. Mid-spring:

- Apply Iron Roots 2 and 10-30-20 liquid fertilizer.
- Chemicals and fertilizers can vary per regions and the above schedule is a suggested guide. Replacement chemicals can be used at the discretion of the Contractor.

### 3. Fall Annual Application Schedule:

- 2 weeks after installation: apply Surflan or other pre-emergent herbicide.
- 8 weeks after installation: drench flowers with 10-30-20 liquid fertilizer.

### 6. Mulch

Fresh mulch will be installed annually, often to coincide with heavy leasing efforts; mulch may be installed twice a year directed by LRS. Bed edges to be cut along turf edges as well as along all pavement barriers to a depth of 4 inches. Pine straw is to be shovel-tucked into the trenched bed edge. Mulch should be maintained to a maximum of 2-3 inches in all landscape beds and tree wells. Mulch must be maintained away from building foundations 6-12" such that mulch does not touch the wood siding to prevent losses due to excess moisture and/or insect damage. Mulch must also be installed in a manner to keep material away from outside air conditioning condensing units and out of the intake vents. Areas behind shrubs hedge, along foundation as well as between air conditioning pads will not be mulched unless otherwise directed by the LRS.

### 7. Irrigation System Maintenance

The Landscape Contractor is responsible for maintaining the irrigation system, scheduling and monitoring its use. Irrigation schedules should be set to water the plant material and turf areas for proper plant survival according to the water requirements of each irrigation zone and planting area, avoiding all unnecessary watering of plant material. The Landscape Contractor will perform a yearly irrigation audit defined by the LRS to reduce unnecessary watering of plant material, identify each zone and type of plant material being irrigated, locate and identify irrigation meters for each property and specify irrigation watering times per zone to adequately supplement water to plant materials according to the water requirements of the plant materials for each irrigation zone. If the Contractor is paid monthly to monitor the irrigation system then an audit must be completed by the 15<sup>th</sup> of each month to assure proper water application – timing, duration, frequency and a report sent to the LRS by the 25<sup>th</sup> of each month.

The irrigation audit will serve as a tool for the efficient use of irrigation water on all LRS properties. The irrigation audits should be completed at the beginning of each calendar year or at the time in which irrigation systems are started up from winterization. LRS reserves the right to withhold payment to the Landscape Contractor for any misuse of irrigation water due to improper scheduling or non-adherence to the watering times specified in the irrigation audit.

The Landscape Contractor at his expense will replace plant/turf loss resulting from improperly functioning irrigation systems.

### **Irrigation Startup and Shut down**

When deemed appropriate by the LRS the irrigation system will be activated and thoroughly inspected before beginning operations for the watering season. Equipment which fails testing must be noted and described in writing. Any necessary repairs must be approved by the Manager prior to beginning work.

During the winter, for shallow soil freezing, the system is to be turned off at the backflow prevention device/double check, pipes to be drained or blown clear of water to prevent freeze damage, and backflow dismantled if warranted by local weather conditions. It is the Contractor's responsibility to winterize the irrigation system prior to freezing or frost warnings. If damage to real property or personal injury occurs due to Contractor's failure to winterize the system, the Contractor shall be financially responsible.

### **Repairs are to be carried out as follows:**

Parts shall be the same as used in the original system per original installation specifications or shall be from a manufacturer approved by LRS.

Sprinkler nozzles shall provide the same coverage and gallons per minute flow as per the original installation specifications to assure those turf areas and/or landscape beds receive adequate water to support plants according to the water requirements for plant survival to avoid over watering and runoff of irrigation water not needed by the plant material.

Damage caused by landscape operations should be corrected within 24 hours to reduce effect on landscape materials. Broken heads resulting from landscape maintenance functions – mowing, shrub trimming or any other landscape task – will be repaired/replaced by Landscape Contractor at the Landscape Contractor's expense. Problems with clocks, valves, and pipes must be communicated to the on-site manager and LRS to secure funds and approval for repairs/replacements.

Minor repairs (typically those that require less than one hour) shall be repaired by the Landscape Contractor with minimal cost and will need prior approval by LRS. The property may choose to purchase the replacement parts; Landscape Contractor will be asked to install.

Major repairs to clocks, valves, pipe breaks or large number heads (caused by vandalism) must be reported to on-site property manager and LRS for approval before repair may begin. A detailed estimate must be provided within 48 hours of discovery and should be completed within 7 days of approval.

### **8. Snow Removal:**

Facility areas to be maintained snow/ice free include, but are not limited to private roads, parking lots, stairs, ramps and approaches, walkways/sidewalks, fire doors/exits, entrance and access doors, shipping and receiving areas, vehicle turning areas and facility driveways.

All snow removal services should be complete prior to 6 am. In the event snowfall continues to accumulate beyond 6 am, contractor will work LRS designee to identify areas of priority as well as having all sites clear and open in before next school day.

In the event of heavy snow conditions relocating snow off site or to an onsite location may be necessary. This will be an expense over and above the contract and will be agreed upon between contractor and LRS designee at the time of need. LRS reserves the right to use allocated funds included in the contract that have not been used to offset this additional cost.

Contractor shall be responsible for the repairs or reimbursement for repairs for any damage done to LRS property, including but not limited to roadway and parking berms, stairs, sidewalks, storage structures, brick walls, speed bumps, lamp posts etc. if said damage is caused by Contractor's equipment or personnel while clearing, pushing, or dumping snow. Contractor is also responsible for repairs or reimbursement for repairs if Contractor's equipment or personnel while clearing, pushing, or dumping snow, cause any damage to lawn areas, shrubs, trees etc. Contractor shall not pile or dump snow on shrubs and shall take particular care to prevent damage to lawn areas.

All snow treatment chemicals and products must abide by Indiana school code and requirements.

Price should include salting properties as need. Total number included is up to 15 times for each property Bags of salt are used unless equipment procurement allows for bed hoppers to be utilized.

Price should include up to 15 plowing services for each property.

## **9. Sports Complexes & Athletic Fields:**

All sports fields and complexes should be maintained in an orderly fashion in conjunction with timing of all sporting events. The sports season schedules will be provided by athletic director prior to the first practice of each respective sports season.

### **Grass Baseball/Softball/Soccer & Football Fields**

#### General Maintenance

Contractor is responsible for Field Season Preparation that consists of lip repair, grass repair, conditioning, mound maintenance, base anchoring, weed removal, edging, etc. as required to prepare the athletic fields for play. Also includes:

- Fertilization of baseball, soccer, and football fields five times per year (one of which is a grub control)
- Apply pre-emergent weed control in March and April.
- Apply post-emergent weed control on an as needed basis.
- Surface insect control applied as needed.
- Subsurface insect control (grub) applied proactively.
- Aerate fields one time per year.
- Apply seed as needed.
- Replace sod as needed.
- Top dress in the fall
- Ensure level playing surface (includes lip maintenance, nail and float, rolling the infields, etc.)
- Maintain base anchors within two inches of playing surface at appropriate distance(s)

Contractor is NOT responsible for Field Game Day Preparation including but not limited to field prep and other maintenance that is required to adequately prepare the fields for games. Pre-game preparations include but not limited to will be done by LRS Staff:

#### **Baseball & Softball Preparations to be done by Contractor**

- Groom/drag all infields.
- Water the infields (if necessary)
- Fill-in home plate, pitchers' mound, and base areas if needed.
- Chalk base paths up to the batter's box
- Mark the batter box and touch up foul lines if needed.
- Paint foul lines on grass/turf if needed.
- Rake (gravel, dirt, or sand) in front of dugouts and paths leading to home plate and wash out of grass.



- Edge grass lines as needed (base paths, mounds, home plates, back edge of infields, and any other area where grass meets a hard surface)
- Keep the dirt playing surface level.
- Condition dirt playing field surface with infield conditioner.
- Remove and maintain lips.
- Remove weeds and grass from dirt playing surfaces.
- Water infield dirt to keep moisture in and dust down.
- Build and repair pitching mounds as needed.
- Re-attach advertising signs on fences that become loose.
- Wash build-up areas (of dirt in grass) back into dirt area

Mowing shall be scheduled on a regular basis as to keep the fields in playable condition. Contractor shall mow the outfields, soccer fields and football fields if necessary while mowing the infields at least two times per week dependent on weather, growth, and game schedule.

Watering the baseball and softball infields is to be done by contractor.

Irrigation at fields will be handled in the same standards as item #7 in this RFP.

### Equipment Maintenance & Supplies

Contractor will be responsible for all costs of gas, oil, equipment supplies and all associated supplies responsible for maintaining the fields. A storage area will be provided by LRS for materials and supplies.

### **Turf Field Maintenance**

Lake Ridge Schools uses synthetic turf fields at the following locations:

1.) Calumet High School – Football

Scope of Services should consist of the following:

**SURFACE ANTI-STATIC TREATMENT USING BOOM SPRAYER** - On an as-needed basis for the initial break-in period of the field. Dilute the proper static conditioner in water at the recommended rates and apply the solution to your field.

**BRUSHING** - Every 2-3 weeks or more frequently during heavy use periods. Serves to keep the infill level consistent throughout the field of play. Infill levelling might also be required following a heavy rainfall or high activity.

**AERATING** - Maximum 3 times/year. This serves to raise the infill level and avoid over-settling. Timing would be ideally in the spring and after heavy use, such as after a full sport season.

**RAKING** - Every 3-4 weeks or more frequently during heavy use periods and/or heavy rainfalls. This can be done in tandem with Surface Brushing.

**SWEEPING** - As needed. The presence of foreign debris must be controlled and is recommended as often as required. It is important to keep the surface and infill clean to extend the life of the turf system.

**INSPECTION** - As needed. A weekly walk-through inspection is recommended to monitor the need for minor repairs, infill touch ups in high traffic areas and potential sweeping up of debris.

**INFILL DRESSING** - As needed to maintain the specified infill depth. In high-traffic areas this could be as often as once a week, given the lightweight nature of the infill.



Routine maintenance on these surfaces is vital to extend the life and ensure a safe athletic environment for the student athletes. Routine turf maintenance will be included and consist of the following items:

SYNTHETIC TURF MAINTENANCE		
FUNCTION	FREQUENCY (PER YEAR)	PRICE
Surface Brushing	Every 4-6 weeks	\$ Per Brushing
Surface Aerating	2-3 Times Annually	\$ Per Aerating
Surface Raking	Every 4-6 weeks	\$ Per Raking
Infill Dressing	As Needed	\$ Per Infill
Snow Removal	As Needed	\$ Per Snow Removal
Category Total		\$

## 10. General Rules and Conditions

### A. Notification

Prior to Contractor's performance of any work under this Agreement, the Contractor shall provide the Manager's authorized representative with the name, company email address, and cell phone number of the Contractor's main contact representative. The Contractor's main contact representative shall be a person in the employ of the Contractor who is familiar with, and regularly updated on, all the Contractor's activities at the Property. The Contractor's main contact representative shall personally perform regular reviews of the Contractor's work at the Property. The Contractor's main contact representative shall notify the Manager's authorized representative upon arrival at the Property prior to beginning work for the day and shall also notify Manager's authorized representative upon completion of the work for the day.

Each office shall maintain a vendor log listing date, time arriving on property, duties planned for that day. This is critical especially for chemical applications and landscape installation projects so that the property manager is aware of what the landscape crews will be doing and locations on the property where they will be working should a resident inquire what crews are doing that day. **If landscape crews fail to check-in and manager questions whether the work was completed satisfactorily, the Landscape Contractor may forfeit payment for services rendered that visit. Again, all payments by the LRS for services rendered under this agreement are conditional on the LRS's acceptance of the services.**

### B. Conduct

All Landscape Contractor personnel will always conduct themselves in a professional manner. We expect and will accept nothing less than courteous behavior. Company uniform will be always worn. No smoking in or around the building(s) will be permitted. Rudeness or discourteous acts by Contractor employees towards residents, tenants, guests, clients, management, etc. will not be tolerated. Contractor will be required to park in designated areas. Violations will be reported to the Landscape Contractor; repeat violations will result in the employee being banned from the property and may be considered grounds for terminating the contract.

### C. Use of Subcontractor

LRS understands that some jobs may be such that primary Landscape Contractor is neither equipped nor licensed to complete the necessary tasks, but all subcontractors must be approved by LRS. The Landscape

Contractor is ultimately responsible for the quality and timeliness for all work of subcontractors furnished by Landscape Contractor. Landscape Contractor is further responsible for ensuring that all subcontractors are paid in a timely manner for subcontractor's portion of work completed and specifically agrees to defend, indemnify and LRS from any claims, demands, lawsuits, damages, liabilities, judgments and settlements of any kind arising out of any payments owed to subcontractors furnished by Landscape Contractor pursuant to this agreement. This in no way affects LRS's right to deny acceptance and/or payment for services rendered by either Landscape Contractor or subcontractors furnished by Landscape Contractor. Landscape Contractor further agrees and warrants that they will ensure that all subcontractors agree to abide by the same standards outlined in this set of specifications

#### **D. Property Inspections**

The LRS will inspect the property routinely to assure that quality standards are being followed. A report will be completed, and the information will be distributed to the on-site manager and the Landscape Contractor.

1. The vendor must conduct at least 4 landscape audits through the course of the year.
2. The landscape audits must be scheduled and walked with a LRS employee with prior notification of the walk for each individually contracted property.

#### **A. Compliance with Applicable Statutes, Ordinances and Regulations**

Contractor agrees to comply with all applicable federal, state, county and municipal statutes, codes, ordinances and regulations, including applicable environmental laws and regulations. Contractor shall manage all environmental matters in connection with the contract work in a careful, diligent, and prudent manner, including without limitation, assuring that the use storage and disposal of hazardous materials at the Property are in compliance with applicable environmental laws. **Contractor shall prove Material Safety Data Sheets to the property manager for all hazardous materials and chemicals used in connection the contracted work.**

#### **C. Special Circumstances**

State certification licenses and applicator insurance are required for pesticide applications at LRS properties. It is the responsibility of the Landscape Contractor to comply with all federal, state, and local regulations concerning pesticide applications. In addition, copies of all applicable Material Safety Data Sheets should be sent to both the apartment management office as well as to the LRS upon request.

**In the event services are not completed satisfactorily or should contractor damage either real estate or personal property at any LRS facility, the LRS Administration may at their discretion withhold funds either until work has been completed satisfactorily or damages have been repaired.**

**EXHIBIT "A"****FEE SUMMARY**

This Fee Summary Totals Exhibit "B" the Itemized Bid Forms for Categories A, B, C, D, E. & F. The combined annual sum of all five categories is defined as the "TOTAL BID PRICE."

<b>CATEGORY</b>	<b>TOTAL</b>
<b>A - LANDSCAPE MAINTENANCE</b>	
<b>B – CHEMICAL MAINTENANCE</b>	
<b>C - PINE STRAW / MULCH – PER OCCURRENCE</b>	
<b>D – ANNUAL MAINTENANCE – PER INSTALLATION</b>	
<b>E – IRRIGATION MAINTENANCE</b>	
<b>F – SNOW REMOVAL</b>	

**FIRST YEAR TOTAL BID PRICE** \_\_\_\_\_

**EXHIBIT "B"****ITEMIZED BID FORMS FOR CATEGORIES A, B, C, D, E & F**

<b>CATEGORY A - LANDSCAPE MAINTENANCE</b>		
<b>FUNCTION</b>	<b>FREQUENCY (PER YEAR)</b>	<b>PRICE</b>
Turf Mow	Weekly	\$ included in monthly maintenance
Turf Edge Bed lines/Edge Hardlines	Weekly	\$ included in monthly maintenance
Bermuda Monofilament Trim	Weekly	\$ included in monthly maintenance
Shrub and Groundcover Trim	Weekly; heavy trim in fall/winter months	\$ included in monthly maintenance
Debris Disposal	Weekly	\$ included in monthly maintenance
Shrub and Groundcover Trim	Weekly; heavy trim in fall/winter months	\$ included in monthly maintenance
Bed Weed Control	Weekly	\$ included in monthly maintenance
<b>Category A Total</b>		<b>\$</b>

CATEGORY B – CHEMICAL MAINTENANCE		
FUNCTION	FREQUENCY (PER YEAR)	PRICE
Turf Weed Control		\$ included in monthly maintenance
Turf Fertilization		\$ included in monthly maintenance
Shrub & Groundcover Fertilization	1	\$ included in monthly maintenance
Insect & Disease Control	As Needed	\$ included in monthly maintenance
pH Adjustment	As Needed	\$ included in monthly maintenance
Category B Total		\$

CATEGORY C – PINE STRAW/MULCH		
FUNCTION	FREQUENCY (PER YEAR)	PRICE
Pine Straw / Mulch (First) Material	1 (Additional at LRS Discretion at Stated Price per Application)	\$ Per Application
Category C Total		\$

CATEGORY D – SEASONAL PLANT INSTALLATION **ONLY UPON APPROVAL OF LRS ADMINISTRATION***		
PLANT MATERIAL	SIZE	PRICE
Fall Annuals – Material & Labor	Minimum 4" sufficiently cover & highlight all beds determined by LRS.	\$ Per Occurrence
Summer Annuals – Material & Labor	Minimum 4" sufficiently cover & highlight all beds determined by LRS.	\$ Per Occurrence
Category D Total		\$

*Notes: All annuals shall be 4" container-grown "Grade A" plants with multiple blooms at the time of installation. All prices should include soil amendments, mulch, labor, taxes, etc. associated with installation. All plants should be in bloom at time of planting. Specific colors and varieties shall be mutually agreed upon prior to installation. Contractor is responsible for estimating and confirming the quantity of flowers based on the spacing:*

*a. Distance away from curbs, turf lines, etc. - Summer Annuals 10', Fall Annuals 8", and b. On Center (o.c.) Spacings - Summer Annuals 10', Fall Annuals 8"*

CATEGORY E – IRRIGATION MAINTENANCE	
Irrigation Inspection	\$ included in Monthly Maintenance
Irrigation Winterization	\$ Per Occurrence
Irrigation Startup	\$ Per Occurrence
Cost per hour – Irrigation Service Technician with one laborer	\$ Per Occurrence

CATEGORY F – SNOW MAINTENANCE		
FUNCTION	FREQUENCY (PER YEAR) / (PER SITE)	PRICE
Snow Plowing	15 PER YEAR/PER SITE	\$ Per Occurrence Per LRS Property
Salt Application	15 PER YEAR/PER SITE	\$ Per Occurrence Per LRS Property
Category F Total		\$

*The prices above shall be commensurate with the contract term.*

## **General Maintenance**

### **1.0 ESSENTIAL DUTIES**

Contractor will provide general maintenance of buildings and grounds. Not limited to:

- Buildings Maintenance
  - Minor electrical repairs
  - Light construction
  - Paint walls, floors, woodwork, and fixtures, using appropriate tools
  - Routine inspections and maintenance of HVAC systems, plumbing, electrical systems, and other building components.
  - Repairs and replacements of doors, windows, flooring, and other structural elements.
  - Painting and touch-up work to maintain a clean and appealing environment.
  - Emergency response for urgent maintenance issues.
- Grounds Maintenance
  - Landscaping services, including lawn care, tree trimming, and weed control.
  - Snow removal and ice management during winter months.
  - Playground equipment inspections and repairs.
  - Exterior lighting maintenance.
- Equipment Maintenance
  - Regular inspections and maintenance of school equipment, including gymnasium equipment, kitchen appliances, and audio-visual equipment.
  - Timely repairs or replacements of malfunctioning equipment.
- Preventive Maintenance
  - Develop and implement a preventive maintenance schedule for all facilities and equipment.
  - Keep detailed records of maintenance activities and inspections.
  - Light masonry, interior walls, and other repairs
  - Maintain clean and safe working environment
  - Observe and promote safe work practices and procedures at all times
  - Adhere to proper cleaning and storage of materials
  - Take all necessary and reasonable precautions to protect students, equipment, materials, and facilities
  - Reports all accidents and/or potential hazards to supervisor
  - Attend all in-service trainings and leadership programs
  - Complies with and supports all school regulations and policies
  - Models all non-discriminatory practices in all activities
- Performs other duties as assigned by Supervisor in accordance with school policies and practices
  - Arrange furnishings (desks, tables, chairs, etc.)
  - Inspect facilities for routine maintenance
  - Maintains all tools and equipment in a professional manner
  - Repairs not limited to, (roofs, furniture, bleachers, fences, playground equipment, doors, locks, lockers, fittings, drains, bathrooms, stalls, kitchen equipment, etc.)

## **Fleet & Vehicle Maintenance**

### **1.0 ESSENTIAL DUTIES**

Contractor will oversee the complete maintenance schedules and cover all costs associated with said maintenance and fuel for the following:

- LRS trucks, plows, salt hoppers, trailers
- LRS tractors and mowers
- LRS Activity buses
  - Will prepare them for semi-annual/annual inspections

Upon execution of this agreement, LRS and Contractor may enter into a purchase agreement of equipment at the discretion of LRS.

## **Mechanical Maintenance**

### **1.0 Overview**

Lake Ridge School Corporation is seeking an experienced firm for the purpose of providing comprehensive mechanical maintenance services for their facilities named above.

### **2.0 Scope of Services**

It is the customer's intent to enter into a comprehensive service agreement with the selected firm for Preventive Maintenance, Repair, Emergency Service, and Energy Analysis for the effective and economical operation of the mechanical systems at the customer's facilities. The selected firm shall furnish all labor, materials, tools, and resources necessary to design, develop, and implement a preventive maintenance program for the customers' existing mechanical systems. In addition to preventive maintenance and repair, the selected firm must be able to demonstrate the capability and resources to design and install new or replacement systems and to perform an energy analysis of the facility to benchmark the operating efficiency, calculate the Energy Star rating, identify and quantify energy savings opportunity, and track the utility data monthly.

#### **2.1 General Requirements**

- a. The selected firm shall provide comprehensive maintenance services on all mechanical equipment at the facility and list the equipment in their response.
- b. The selected firm shall furnish all labor, parts, materials, test equipment, tools, programming materials, and services in conformance with the terms and conditions as outlined in this RFP.
- c. To ensure that the customer receives the scope of services required by this RFP, the selected firm shall have a service management system that provides the minimum service performance information as defined in Section 4.0.
- d. Each firm receiving this RFP has been provided access to visit the facility to inspect the equipment and interview the customer to clarify the scope of work. Any additional questions must be directed by email to [awilkerson@lakeridgeschools.net](mailto:awilkerson@lakeridgeschools.net). All questions must be received by March 22, 2024, at 4:00 PM.
- e. Each firm must meet all requirements under this RFP. Any proposal not meeting these requirements may be considered incomplete.

#### **2.2 Service Qualifications**

- a. Service Technician Qualifications – The selected firm shall employ qualified technicians who will always be designated in the district. The service technicians assigned to maintain the mechanical systems shall be certified to service the systems under contract. Copies of the certifications must be included in the response.

#### **2.3 General Maintenance Procedures**

- a. The selected firm shall:
  1. Schedule preventive maintenance tasks through the use of a computerized service management system to insure a uniform and detailed method of schedule the work.
  2. Maintain complete and detailed service and maintenance records for each piece of equipment referenced in Section 2.1 Paragraph a in a secure database that will be provided to the customer upon request.
  3. Provide access via Internet portal to service call and work order status and history.
  4. Have the ability to receive service requests via an Internet web site and call center on a 24/7-hour 365-day basis.

## **2.4 Preventive Maintenance Calls**

a. Most scheduled maintenance calls under this agreement will be performed during normal working hours defined as 8:00 AM through 5:00 PM. Chiller shutdowns must be scheduled after hours or on weekends and in communication with the firm.

The customer will provide reasonable access to all equipment covered by the agreement. The selected firm shall be free to start and stop all equipment as arranged with on-site customer representative.

## **2.5 Emergency Service**

a. Emergency service shall be provided 24 hours a day to minimize downtime. The selected firm shall provide emergency service as part of this agreement including all labor, overtime, travel costs, parts, supplies, to diagnose and repair any failed component covered under this agreement.

## **2.6 Parts and Component Replacement**

a. The selected firm will repair or replace worn parts or system components covered under this agreement with new parts. All replacement parts and components for the covered mechanical systems shall be provided by the selected firm and will be included in the cost of this service agreement. All miscellaneous parts and supplies (belts, lubricants, tools, refrigerant, tests instruments, air filters) necessary to maintain the mechanical systems shall be included in the cost of this service agreement.

b. The selected firm will not be held responsible for repairs or replacements necessitated by reason of negligent, misuse of the equipment by anyone other than the selected firm or by reason of any other cause beyond the control of the selected firm, except for normal wear and tear.

## **3.0 Scope of Services**

### **3.1 Covered equipment includes:**

a. All mechanical HVAC systems including, chillers, cooling towers, boilers, air handling units, split systems, unit ventilators, water source heat pumps, unit heaters, exhaust fans, pneumatic temperature controllers, air compressors, and DDC control systems, etc.

b. Water treatment chemical equipment is not included as part of this RFP.

### **3.2 Service Included**

The general services listed below shall apply to the systems and equipment described above.

a. **Preventive Maintenance** – The selected firm shall provide a guaranteed performance-based agreement entailing every aspect of professional preventive and predictive maintenance. The required maintenance tasking must be customized to include manufacture recommendations, operating runtime and specific needs of the customer. Inspections in the form of non-destructive testing, vibration & noise monitoring, chemical analysis as well as routine visual inspections must be performed to ensure that the systems are in proper operating condition and to identify any potential system failures. The following must be included:

1. Maintenance tasking should include visual inspection of the following:

- Fan assemblies, belts and sheaves, motor mounts & vibration pads, electrical connections and contactors, heating and cooling coils, filter media and racks, sight glass condition, bearings, compressor sections, condensate drains and pans, heating sections, crankcase heaters, seals and packing.

2. Maintenance tasking should include a physical check and or test of the following:

- Lubrication , oil sump, temperature controls and set-points, starter operation, water flows, alignment on couplings, motor operating conditions, suction and discharge pressures, flow switch operation, control interlocks, flue stack assembly, damper operation, outside air intakes, refrigerant pump down, external interlocks, motor voltage and amperages, refrigerant charges, system leaks, oil and fluid levels, pressures and temperatures, purge system, superheat and sub-cooling, and approach temperature.

b. **Predictive Maintenance** – The selected firm shall perform tasks to detect early signs of deteriorating performance and to predict potential system failures. The following tasks must be included:

1. Adjustment - Damper & valve linkages, unloaders, belt tensions, fan speed, set points, gas pressure regulators.
2. Alignment - Open drive couplings, belt sheaves, pulleys, coil fins, belt drives.
3. Cleaning Control devices, electrical contractor, condenser and evaporator coils, fan blades & impellers, equipment areas, and ignitors.



4. Vibration Damper linkages, fan bearings, axial fan drives, pumps, motors.
5. Secure and Tighten Motor terminals, control terminals, piping clamps, line fittings, mounting hardware, electrical connections, equipment panels, motor mounts, vibration pad nuts & bolts, damper sections.

c. **Equipment Inventory** – The selected firm must include a detailed equipment inventory by component for all equipment included in this RFP response.

d. **Travel and Vehicle Expense** – The selected firm must include vehicle expenses necessary to perform this agreement.

e. **Parts and Component Replacement** – The selected firm shall include component and parts replacement for covered equipment as outlined in Section 2.6.

f. **Water Treatment** – Water treatment is not included in this RFP.

g. **Life Cycle Cost Analysis** – The selected firm must complete a lifecycle cost analysis of the existing mechanical systems within 90 days of being awarded the agreement to include current capital investment, current operating costs, and future capital replacement costs. The analysis must also include risk analysis of existing mechanical systems.

h. **Energy Analysis** – The selected firm must complete an energy analysis of the customer's building within 60 days of being awarded the agreement. The analysis should establish a base year for electric and gas consumption, should benchmark the building utility consumption to similar buildings in Ohio, should identify and quantify specific savings opportunities with a priority on low cost or no cost opportunity, and be able to track and record utility data on a monthly basis.

#### 4.0 **Service Management and Performance Data System**

a. **Minimum** information required to be captured and stored shall consist of the following:

1. An inventory of all equipment under coverage of the agreement
2. Records of every service order issued during the term of the agreement including customer-initiated service requests and computer-generated preventive maintenance      tasking.
3. Records of refrigerant leakage, repairs, and usage must be maintained to ensure EPA compliance.
4. Each service record shall include a description of the service request, resolution of the service request, the date and time the work was performed and completed, and the names of the service technicians.
5. The service requests shall be captured electronically and be available for viewing by the customer via an internet portal.

b. **Services**

1. Provide the estimated costs of annual reconciliation statements, measurement and verification and any required on-going services.
2. Include your firm's methodology, process, and options for annual measurement and verification.
3. Firm must provide annually other savings opportunities that Lake Ridge School Corporation can embark on if willing. These services can be anything that reduces owning and operating costs for the school district.

#### 5.0 **Financial Approach**

The respondent should describe financial alternatives that will responsibly maximize the net economic benefit and minimize financial risk.

a. **Financing Sources**

- Provide descriptions of the sources and types and costs of financing available and recommended for use in this program along with the firm's experience with each investor.

b. **Penalties and Other Costs**

- Indicate any penalties or other costs that will be assessed in the event the decision is made not to proceed with this project at any point prior to mutual approval of a Contract Agreement.

c. **Savings**

- Provide an operational savings amount to be guaranteed by the firm on an annual basis during the duration of the contract.
- Describe the basis of cost of operations savings, its execution, and the methods of auditing.

## **6.0 Financial Model**

1. Provide a financial model incorporating all project costs including mechanical services, engineering, measurement and verification, financing and any other costs along with the project savings for the recommended project. The model should show the costs and savings for each year of the proposed project. Include the specific method for adjustments of base year with respect to pertinent variables.
2. Include the procedure for calculation of savings with related cost adjustments.
3. Include the procedure for handling excess savings.
4. Include the procedure for handling project delays and related cost adjustments.

## **7.0 Ability to Self-Perform / Other Benefits**

1. Provide proof of company's ability to self-perform the specific aspects of the project installation.
2. List all subcontractors and their responsibility and scope of work for this project.

## **8.0 Other Benefits**

- a. Describe any other benefits your firm can bring to the energy services program. Please use the lettering and numbering format in outlining your responses to assist Lake Ridge School Corporation in the qualification and evaluation process.

## SELECTION AND EVALUATION

All responses will be evaluated for completeness and clarity of information. Missing information or unresponsiveness in an area will be reason for a lower score in that area or elimination.

### Evaluation Rubric

Each response will be evaluated by a review committee which will grade the responses on merit, completeness, and the ability of the Respondent to meet the needs and best interests and stated goals and objectives of the LRS School Board. The evaluation process may include verification of presented information and clarification as requested. (See following chart)

### Grading Point Values

<i>Categories</i>	<i>Point Value</i>	<i>Grade (0-100%)</i>	<i>Score</i>
<b>Company Qualifications</b>	<b>30</b>		
Company Profile / Product Independence	10		
Project team experience	15		
Insurance and bonding	5		
<b>Technical Approach and Scope</b>	<b>30</b>		
Technical approach	10		
Project management	10		
Savings justification	10		
<b>Services</b>	<b>10</b>		
Measurement and verification of savings	5		
Limited cost of required services	2.5		
Innovative energy services	2.5		
<b>Financial Approach</b>	<b>15</b>		
Financial model	5		
Auditing methods	5		
Financial model and net financial benefit	5		
<b>Company Ability to Self-Perform</b>	<b>15</b>		
Self-Performance and Other benefits	15		
<b>Total Points</b>	<b>100</b>		

### Acceptance and Rejection of Bids Notice:

Lake Ridge School Corporation reserves the right to (1) reject all bids; (2) reject only certain bids which are non-conforming or non-responsive to the bid requirements; (3) accept only a portion, part or specific items of work of all and reject others, as LRS shall in its sole discretion determine to be in its best interest; and/or (4) award the Contract to the responsible Bidder submitting the lowest bid responsive to the bidding requirements. No bid will be accepted form or Contract awarded to any person, firm or corporation that is in arrears or is in default to LRS upon any debt or contract, or that is a defaulter, as surety or otherwise, upon any obligation to said LRS or that has failed to perform faithfully any previous contract with the LRS.

In the event of a rejection of a portion, part, or certain items of work of all bids, the bid of each Bidder shall automatically be deemed reduced by the amount of such rejected part or item at the unit price or other cost designated therefore by that Bidder on its submitted Bid Form. The successful Bidder so selected may not refuse to enter a Contract with LRS on the basis that LRS awarded a Contract for less than all portions or items of the work specified in the Bid Documents. LRS reserves the right to waive any technicalities or irregularities, and to disregard any informality on the bids and bidding, when in its opinion the best interest of LRS will be served by such actions and in accordance with applicable law.



# CONTRACTOR'S BID FOR PUBLIC WORK - FORM 96

State Form 52414 (R2 1 2-13) / Form 96 (Revised 2013)

Prescribed by State Board of Accounts

## PART I

(To be completed for all bids. Please type or print)

Date (month, day, year): \_\_\_\_\_

1. Governmental Unit (Owner): \_\_\_\_\_

2. County : \_\_\_\_\_

3. Bidder (Firm): \_\_\_\_\_

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

City/State/ZIPcode: \_\_\_\_\_

4. Telephone Number: \_\_\_\_\_

5. Agent of Bidder (if applicable): \_\_\_\_\_

Pursuant to notices given, the undersigned offers to furnish labor and/or material necessary to complete the public works project of

\_\_\_\_\_

(Governmental Unit) in accordance with plans and specifications prepared by

\_\_\_\_\_ and dated \_\_\_\_\_ for the sum of

\_\_\_\_\_ \$ \_\_\_\_\_

The undersigned further agrees to furnish a bond or certified check with this bid for an amount specified in the notice of the letting. If alternative bids apply, the undersigned submits a proposal for each in accordance with the notice. Any addendums attached will be specifically referenced on the applicable page.

If additional units of material included in the contract are needed, the cost of units must be the same as that shown in the original contract if accepted by the governmental unit. If the bid is to be awarded on a unit basis, the itemization of the units shall be shown on a separate attachment.

The contractor and his subcontractors, if any, shall not discriminate against or intimidate any employee, or applicant for employment, to be employed in the performance of this contract, with respect to any matter directly or indirectly related to employment because of race, religion, color, sex, national origin or ancestry. Breach of this covenant may be regarded as a material breach of the contract.

CERTIFICATION OF USE OF UNITED STATES STEEL  
PRODUCTS (If applicable)

I, the undersigned bidder or agent as a contractor on a public works project, understand my statutory obligation to use steel products made in the United States (I.C. 5-16-8-2). hereby certify that I and alt subcontractors employed by me for this project will use U.S. steel products on this project if awarded. I understand that violations hereunder may result in forfeiture of contractual payments.

ACCEPTANCE

The above bid is accepted this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ day of subject to the

following conditions:

\_\_\_\_\_

\_\_\_\_\_

Contracting Authority Members:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

PART II

(For projects of \$150,000 or more - IC 36-1-12-4)

Governmental Unit:

\_\_\_\_\_

Bidder (Firm)

\_\_\_\_\_

Date (month, day, year): \_\_\_\_\_

These statements are to be submitted under oath by each bidder with and as a part of his bid. Attach additional pages for each section as needed.

## SECTION I EXPERIENCE QUESTIONNAIRE

1. What public works projects has your organization completed for the period of one (1) year prior to the date of the current bid?

Contract Amount	Class of Work	Completion Date	Name and Address of Owner

2. What public works projects are now in process of construction by your organization?

Contract Amount	Class of Work	Expected Completion Date	Name and Address of Owner

3. Have you ever failed to complete any work awarded to you? \_\_\_\_\_ If so, where and why?

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4. List references from private firms for which you have performed work.

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## SECTION II PLAN AND EQUIPMENT QUESTIONNAIRE

1. Explain your plan or layout for performing proposed work. (Examples could include a narrative of when you could begin work, complete the project, number of workers, etc. and any other information which you believe would enable the governmental unit to consider your bid.)

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2. Please list the names and addresses of all subcontractors (i.e. persons or firms outside your own firm who have performed part of the work) that you have used on public works projects during the past five (5) years along with a brief description of the work done by each subcontractor.

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3. If you intend to sublet any portion of the work, state the name and address of each subcontractor, equipment to be used by the subcontractor, and whether you will require a bond. However, if you are unable to currently provide a listing, please understand a listing must be provided prior to contract approval. Until the completion of the proposed project, you are under a continuing obligation to immediately notify the governmental unit in the event that you subsequently determine that you will use a subcontractor on the proposed project.

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4. What equipment do you have available to use for the proposed project? Any equipment to be used by subcontractors may also be required to be listed by the governmental unit.

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5. Have you entered into contracts or received offers for all materials which substantiate the prices used in preparing your proposal? If not, please explain the rationale used which would corroborate the prices listed.

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### SECTION III CONTRACTOR'S FINANCIAL STATEMENT

Attachment of bidder's financial statement is mandatory. Any bid submitted without said financial statement as required by statute shall thereby be rendered invalid. The financial statement provided hereunder to the governing body awarding the contract must be specific enough in detail so that said governing body can make a proper determination of the bidder's capability for completing the project if awarded.



## SECTION IV CONTRACTOR'S NON – COLLUSION AFFIDAVIT

The undersigned bidder or agent, being duly sworn on oath, says that he has not, nor has any other member, representative, or agent of the firm, company, corporation or partnership represented by him, entered into any combination, collusion or agreement with any person relative to the price to be bid by anyone at such letting nor to prevent any person from bidding nor to include anyone to refrain from bidding, and that this bid is made without reference to any other bid and without any agreement, understanding or combination with any other person in reference to such bidding.

He further says that no person or persons, firms, or corporation has, have or will receive directly or indirectly, any rebate, fee, gift, commission or thing of value on account of such sale,

## SECTION V OATH AND AFFIRMATION

I HEREBY AFFIRM UNDER THE PENALTIES FOR PERJURY THAT THE FACTS AND INFORMATION CONTAINED IN THE FOREGOING BID FOR PUBLIC WORKS ARE TRUE AND CORRECT.

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

\_\_\_\_\_  
(Name of Organization)

By \_\_\_\_\_

\_\_\_\_\_  
(Title of Person Signing)

## ACKNOWLEDGEMENT

STATE OF \_\_\_\_\_ )  
COUNTY OF \_\_\_\_\_ ) ss

Before me, a Notary Public, personally appeared the above-named \_\_\_\_\_ and  
swore that the statements contained in the foregoing document are true and correct.

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_

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

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

County of Residence: \_\_\_\_\_

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**BIDOF**

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*(Contractor)*

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*(Address)*

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**FOR**  
**PUBLIC WORKS**  
**PROJECTS OF**

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Filed \_\_\_\_\_

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Action taken \_\_\_\_\_

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