REQUEST FOR PROPOSALS

FACILITIES
MANAGEMENT SERVICES

The Woodland Hills School District is accepting proposals for a Facilities Management Service, as described herein.

Title: Facilities Management Services Contract
Due Date: April 20, 2007 by 4:00 P.M.

Proposals shall be sent to:

Woodland Hills School District
Attn: Joyce Sullivan – Business Manager
2430 Greensburg Pike
Pittsburgh, PA 15221

Please indicate on envelope: SEALED PROPOSAL

Enclosed are our requirements, specifications and forms. Proposals will be for a three or five year contract for Facilities Management Services. The initial contract period will begin on July 1, 2007 with renewals available.

There will be a voluntary walk-through on Tuesday, April 17, 2007 at 11:00 AM, beginning at the Administrative Office, 2430 Greensburg Pike, Pittsburgh, PA.

Inquiries regarding this request may be obtained by contacting Joyce Sullivan, Business Office at 412-731-1300 ext. 0133 or at the District website at www.whsd.k12.pa.us/Admin/Business_Office.

The Woodland Hills School District reserves the right to waive any and all guidelines herein and to reject any and all proposals if considered to be in the best interest of the School District.

Sincerely,

Joyce S. Sullivan
Business Manager
Woodland Hills School District
**District Facilities**

The Woodland Hills School District incorporates approximately 891,632 square feet in eight buildings. Currently, there are approximately 5,100 students being instructed throughout the district, in one high school, two junior high schools, and six elementary schools. In addition, there is an administration building that houses district administrative staff and offices.

The district currently employs nine (9) in-house full-time maintenance employees and sixty (60) custodial employees.

**Termination Clause**

It either party fails to comply with any of the obligations required of it in this Agreement and following receipt of written notice specifying the failure, fails to remedy and cure such failure within a reasonable time (but in no event later than (a) ten (10) days for failure to make any payments due and (b) sixty (60) days in case of any other failures), then the non-breaching party shall have the right to terminate this Agreement immediately upon giving sixty (60) days prior written notice of that intention.

**Guarantee**

The contractor will submit with their proposal any guarantees they will provide.

**Requirements**

1. Must presently be providing supportive management services in plant operations, maintenance, custodial and grounds for at least five (5) Public School Districts and provide reference information.

2. Must have a formalized training and educational Program for employees of the Management Company and supervised employees of the School District including the necessary equipment to present the program.

3. Must provide an effective quality control program and make available technical and engineering support when required by the School District.

4. Must have the research and development needed to keep aware of the changing technologies in plant operations and maintenance, custodial and grounds management.

5. Must provide and maintain a computerized maintenance program that includes preventive maintenance, corrective maintenance/work order tracking, casualty prevention and energy tracking. Maintenance staff and Business Manager will have access to this system.

6. Must routinely provide cost reports on preventive maintenance, corrective maintenance, labor usage, work order history, and energy.

7. Must meet standards of local, state and federal requirements.
8. Must provide evidence of financial responsibility of recent date.

9. Must have a record of at least ten (10) years of successful management performance of the building maintenance, custodial and grounds functions in public schools.

10. The successful contractor shall have adequate insurance coverage to protect interests of the contractor as well as the School District including workmen’s compensation coverage for employees of the contractor.

11. The contractor, through its on-site supervisor, shall have primary responsibility for all compliance issues including all applicable local, state, and federal regulations.

It is clearly understood that these specifications provide only for the acquisition of a supervisor for facility Facilities Management services to augment that currently provided by the District. The Board of Education shall remain the employer of all maintenance, custodial and grounds staff employed to work within the District.

The Board of Education reserves all employer rights and responsibilities including, but not limited to the rights to:

1. Direct its employees.

2. Hire, assign, promote, transfer, retain, suspend, demote, discharge or take disciplinary action against employees.

3. Determine the methods, means, and personnel by which School District operations are to be conducted.

4. Take whatever action is necessary to accomplish the mission of the School District in any situation.

5. Negotiate and establish labor agreements with its employees as provided by state laws and regulations.

**Definition of Maintenance Activities**

The philosophy of the building maintenance program is as follows. These definitions are not all-inclusive but simply state general terminology relating to each category of work.

1. **Preventive Maintenance**: Regularly scheduled maintenance on all mechanical systems within or on school property, which are used for day to day operations. This type of maintenance includes inspecting equipment functional operations, and minor maintenance such as replacing or tightening belts, lubricating bearings, replacing filters, which assure a long term operating condition.

2. **Corrective Maintenance**: The repairs to school real property that has deteriorated, broken, or worn out and cannot be used for its intended purpose. This includes minor maintenance on components of air conditioning systems, heating systems, and any structurally related items. The key is minor repairs; major repairs to such systems as failed chillers, boilers, and roofs normally do not fall within the day to day responsibility and require board approval and appropriation of funds.
to support the repairs. It is essential that small maintenance problems be responded to quickly as they will become worse if left unattended.

3. **Facility Improvement/Modernization**: The major alteration of an existing system which changes its present configuration; install or construct an addition to a facility or mechanical system; to completely revamp or replace major components of a facility. These are all high cost items that should be planned for and funded in each fiscal year’s budget. However, action sometimes must be taken to eliminate a safety or health hazard and the only funds available are the maintenance funds. Extreme caution must be used when utilizing these funds so as not to jeopardize funds needed for the day-to-day operations. No more than 5% productive hours should ever be obligated for this type of work requirement.

4. **Facility Safety Maintenance Programs**: To inspect or have inspected the fire sprinkler, security and alarm systems by certified inspectors to ensure they are functionally operational. The inspection and annual certification of fire extinguishers also falls within this category. All efforts to repair these systems should be attempted by the maintenance department. Any system that is antiquated or has been abandoned in past years should be considered for replacement and funds appropriated through board actions. Approximately 5% of productive hours should be used for this type of work requirement.

5. **Capital Improvement**: These funds have been appropriated through the use of special taxation or bond issues. Priorities should be established for each school year for those large projects beyond normal school maintenance capabilities. Items such as replacing roofs, additions to facilities, buying new facilities, altering or any construction work would normally come from this fund. All decisions on the utilization of these funds require board action.

6. **Productive hours**: Are the hours used to maintain the buildings exclusive of sick, vacation, holiday or other negotiated time off.

The budget is dedicated to the day-to-day care and upkeep of all schools. These funds are limited and should be used only for this purpose, except for those projects expressly provided for in the budget.

**Specification**

**Introduction**

Vendor must provide administrative and technical direction for the management of custodial and maintenance function throughout Woodland Hills School District. Such direction will include, but will not be limited to, assistance in the planning, organizing, coordination, direction, training and controlling of the School District’s plant operations and maintenance to ensure dependable performance of the School District’s heating, air conditioning, refrigeration, mechanical, electrical and plumbing equipment, 24 hours a day and maintenance of the custodial functions in the building and grounds in a condition acceptable to the District; to control the cost of materials; to implement energy conservation measures; and to maintain continuous availability of trained and experienced supervisor and technical support.

The successful vendor shall provide a full-time resident supervisor(s) who shall administer the proposed program daily. The supervisor shall be a direct employee of the vendor.
The Superintendent of Schools or his designee shall have input in the selection of a resident supervisor to be assigned to its facilities. The Board or its designee shall also retain the right to request the vendor for replacement of an assigned supervisor for whatever reasons the Board or its designee deems sufficient. Upon notice of such a replacement request, the vendor shall assign a new supervisor, subject to School Board or its designee’s approval.

The contractor shall be capable of providing the technical and engineering expertise and support for various operations projects as detailed in the attached specifications.

The Business Manager shall represent the Board in the administration of this contract.

The contractor shall provide administration and technical direction in the management of the maintenance department, custodial supplies, & facility organization. The contractor will be present and report as appropriate at monthly Board and Facilities Committee meetings.

A. Professional Management

1. Provide resident management who will undertake all issues and normal duties of the District’s Maintenance Department head pursuant to the attached specifications.

2. Direct the employees in a manner providing for effective coordination of skills, time, facilities, supplies, equipment and purchased services.

3. Supervise, evaluate and interface with outside vendors whose products or services erected the structure, grounds or building systems.

4. Communicate with other School District staff and principals concerning work order requests within five working days of request.

B. Cost Effective Maintenance Resource Management

Manage all maintenance resources with strict attention to fiscal responsibility. Include the following controls:

1. Development, implementation and maintenance of energy (gas, fuel oil, electricity, and water) tracking programs utilizing operational procedures and economically feasible facilities modifications and/or additions. All cost of such modifications to be borne by the District.

2. Installation and upkeep of a parts inventory and an administrative system to control the inventory within the first year of the contract.

C. Safety and Compliance

1. Provide recommendations for policies, procedures, design, construction, equipment and furnishings to facilitate compliance with applicable building codes, fire prevention codes, occupational safety and health codes and standards, the Pennsylvania Department of Education regulations, and all local, state, and federal regulatory requirements.
2. M.S.D.S. Materials – Vendor must provide and or maintain all locations, the purchasing office, and the warehouse, copies of all Material Safety Data Sheets in compliance with OSHA’s Hazard Communication Standard. All labels for secondary containers are to meet OSHA’s guidelines. Also, to collect and maintain as directed, documents in certification of the physical plant’s compliance with the any other requirements of applicable laws and regulations.

3. Prepare and submit plans for deferred maintenance deficiencies correction within three to six months of the effective date of this Agreement and as deficiencies occur thereafter.

4. Make recommendations to produce safe maintenance practices and eliminate hazards, district-wide.

5. Provide and/or comply with an incident reporting system to include investigation and evaluation of incidents.

6. Provide safety-related information, including Right to Know regulations, and presentations for new and continuing education of all supervised employees.

7. Maintain liaison with major safety-oriented agencies.

8. Develop during the first six months of this Agreement and maintain a reference library of pertinent documents and publications which deal with engineering facets of safety to include all applicable building safety codes and standards.

9. Provide a written Preventive Maintenance and Safety Program for fire warning and safety systems to include:
   a. Quarterly inspections of all fire warning and safety systems.
   b. Written, dated and authenticated records of all inspections and maintenance performed.
   c. Monthly inspection of fire extinguishers and, at least, annual maintenance. All inspections and maintenance shall be documented.

D. Employee Direction and Development

1. Administer and direct the Maintenance employees.
   a. Establish and maintain personnel records in accordance with existing policies and procedures.
   b. Maintain a written record of employee performance, qualifications, and specialized training.
   c. Maintain records and make reports a part of occupational safety and health programs.
   d. Make recommendations concerning the Maintenance personnel’s organizational skills, number of hours and shifts.
   e. Direct and supervise the Maintenance employees.
   f. Complete payroll information for submission to the Business Office as needed for payroll.
E. **Performance Review and Evaluation**

1. Routine safety and material inspections will be made by the contractor.

2. A written monthly manager’s report of Maintenance activities and objectives for an energy conservation program shall be provided the administration.

3. The contractor’s management shall routinely conduct a site program status review routinely and make a quarterly written review report.

4. The resident supervisor and divisional manager will routinely meet with administration.

5. A monthly status report of uncompleted job orders shall be provided to originators and administration.

F. **Preventive Maintenance System**

1. The contractor is to provide the current version of its computerized Facilities Management program. The program will provide for the on-line tracking of maintenance activities, including the creation of both preventive maintenance and corrective work orders; for the addition and removal of equipment, and for the scheduling of new equipment for inspection.

2. It shall also provide numerous reporting capabilities, including:
   
   a. Outstanding, scheduled and completed work order reports.
   b. Equipment listings, both summary and detail.
   c. Equipment cost histories.
   d. Employee and contractor listings.

G. **Administrative Specifications**

The Contractor’s resident supervisor will assume all routine duties normally carried out by the director of the maintenance department. Specific areas of responsibility are:

1. **Supervision**: The Contractor’s resident supervisor will assume line management duties controlling direct labor activities including: recommendations for hiring and termination, task assignments, job description, scheduling, training, application of personnel policies and direct labor hour justification.

2. **Staff Interaction**: The Contractor’s resident supervisor will undertake to initiate, develop and maintain sound and cordial working relationships with all members of the School Board, faculty, administration and staff throughout the School District including: routine discourse as to facilities related issues, open solicitation of ideas and involvement in maintenance issues as appropriate, and strong bilateral communication.

3. **Preventive Maintenance and Corrective Work Order System**: It shall become the direct responsibility of the Contractor’s resident supervisor to apply, develop and maintain the preventive maintenance and corrective work order systems, including the following specifics: assist in the inventory and start-up process, train the maintenance staff in the use...
of the systems, customize the work order instructions to the facility, draft work order procedures, frequently review system generated reports and activities, and coordinate on-site systems application with corporate support groups.

4. **Policies and Procedures**: The Contractor’s resident supervisor shall create or augment, develop, publish and apply all policies and procedures appropriate and necessary to the maintenance function including, but not limited to:

   a. Emergency Call-In List
   b. Work Order Procedures
   c. Preventive Maintenance Procedures
   d. Assignments Accountability
   e. Time Accountability
   f. Personnel & Safety Policies

5. **Property Control**: The Contractor’s resident supervisor shall assist the District in maintaining accountability for the use and maintenance of all capital assets, parts, components, and inventories including: actions and/or recommendations as to equipment use, inspection and repairs as well as control of parts and supplies.

6. **Outside Vendors**: The Contractor’s resident supervisor shall function as the contact point for outside vendors and contractors as directed by administration. This includes supporting specification preparation, bid solicitation, proposal evaluation, vendor selection, contract supervision, and invoice review approval and vendor communication.

7. **Energy Control**: The Contractor’s resident supervisor shall review prior energy usage history as available and actively and continuously evaluate energy consumption and the activities and equipment affecting the consumption. Specifically, the Supervisor shall:

   a. Maintain monthly energy usage records.
   b. Review all utility bills.
   c. Initiate, coordinate and emphasize conservation activities, both internally and with corporate staff.
   d. Actively pursue conservation techniques.

8. **Reporting**: The Contractor’s resident supervisor shall issue such monthly reports as shall be deemed necessary to fully apprise administration of current and planned activities, budget compliance, personnel issues, equipment and facility status, energy consumption, as well as departmental problems and objectives.
9. **Records**: The Contractor’s resident supervisor shall initiate, compile and maintain records and files necessary for the smooth and optimal functioning of the maintenance department, such as:

   a. Time Sheets  
   b. Preventive Maintenance  
   c. Safety  
   d. Equipment  
   e. Utility Bills  
   f. Inventory Control  
   g. Budgets  
   h. Security  
   i. Work Orders  
   j. Code Compliance  
   k. Fire Alarms  
   l. Energy Conservation  
   m. Vendors  
   n. Reports  
   o. Planning  
   p. Personnel  
   q. Payroll

10. **Code Compliance**: The Contractor’s resident supervisor shall function to research, review, apply and make recommendations concerning compliance with local, state and national codes, statutes and ordinances.

11. **Safety and Security**: The Contractor’s resident supervisor shall support the District for providing a safely maintained and functionally secure facility to include:

   a. Maintenance of all facility doors, windows, and means of fire egress.  
   b. Routine review of normal and emergency power supply.  
   c. Recommendations to administration concerning safety/security issues.  
   d. Maintenance of facility equipment and structures to effect a safe environment.

12. All maintenance materials and custodial supplies will be furnished by the District.
Reports To Be Supplied By Contractor

A. School Maintenance Activity Report

Frequency: Upon request  Recipient: Principal

This report contains all work that has taken place in a particular school for any given data range. It would typically include information such as:

- work requested
- trade or craft assigned
- who requested the work
- work location
- date scheduled
- work status
- date completed
- cost center charged
- work order type
- priority

This report is to be provided monthly and reviewed with the School Principal.

B. School Maintenance Scheduled Work Report

Frequency: Upon request  Recipient: Principal

This report provides all information related to work which has been scheduled for any given date range and status in a particular school. It would typically include:

- work requested
- priority code
- requestor
- trade or craft assigned
- work location
- approved by
- date scheduled
- cost center
- work order status
- employee/contractor assigned

This report allows school principals and our management team to evaluate changing maintenance requirements and adjust work priorities as needed.

C. School Maintenance Backlog Report

Frequency: Upon request  Recipient: Principal

The backlog or outstanding maintenance work report gives the contractor and the school principal a clear view of what work has been requested but not completed for whatever reason, i.e., parts on order, area not accessible, funding, etc. It will also show progress made toward completing a particular project of task. Typical report information would include:

- work requested
- work order status
- requested by
- priority
- work location
- date scheduled
- work status
- cost center
- requested by
- priority
- employee/contractor assigned

This report ensures that maintenance requests do not get forgotten or lost. The review process also provides a means for re-prioritizing requested work.
D. **School System Maintenance Activity Report**

Frequency: Upon request  
Recipient: Administration

This report is to appear in much the same format as the school maintenance activity report. It will provide a full view of the maintenance activities throughout the Department for any date range, i.e., week, month, fiscal year, calendar year etc.

Information typically included:

- work requested
- work location
- requested by
- date scheduled
- cost center charged
- date completed
- priority
- approved by
- employee or contractor assigned
- trade or craft assigned

The report's purpose is to give an overall view of where maintenance resources and tax dollars are being spent.

E. **School Board Scheduled Maintenance Report**

Frequency: Upon request  
Recipient: Administration

This scheduled work report is to provide a district-wide view of what work has been scheduled for any given date range and status. Normally, organized by school with the following information:

- work requested
- work location
- work requestor
- date scheduled
- work priority
- employee or contractor assigned
- trade or craft assigned
- work status
- approved by
- cost center

Reviewed with the Contractor this report and review ensures the proper focus of your maintenance resources.

F. **School System Maintenance Backlog Report**

Frequency: Upon request  
Recipient: Administration

The district backlog or outstanding work report is to provide district-wide view of the work which has not been completed for any given date range. It is also to provide the reason for the work not being completed, i.e., parts on order, area not accessible, funding, priority, etc. This report is to be organized by school with the following information included:

- work requested
- work location
- requested by
- schedule date
- priority
- employee or contractor assigned
- trade or craft assigned
- work status
- approved by
- cost center

Reviewed with the Administration this report will give district senior management input as to the priority of work not completed.
Contractor Maintenance Cost/Accountability Reports

The contractor’s computerized program should be able to sort and organize cost data by School District defined parameters, i.e., by cost center, school, capital/not capital expenditures, department, in-house, contractor, etc. Cost reports should be by date range providing, month-to-date, year-to-date, or fiscal year-to-date expenditures.

G. **School Maintenance Cost Report**

*Frequency:* Upon request  
*Recipient:* Administration

This report should provide an accounting of all maintenance dollars spent in a particular school. The cost data should be organized and sorted in any number of ways. Typical data found in a school maintenance cost report would include:

- labor cost - employee/contractor assigned
- labor hours - trade or craft assigned
- material cost - work priority
- date completed - work type
- requested by - cost center

The School District and Contractor management should use this report as a tool for preparing the maintenance budget and for cost and labor allocation review.

H. **Equipment Cost Report**

*Frequency:* Upon request  
*Recipient:* Administration

The equipment cost report should be provided to enable management to evaluate maintenance costs for a specific or type of equipment. This should provide up-to-date information for repair/replacement decisions, capital budget planning and life cycle analysis. The information we expect to be found on this report is:

- equipment number - employee/contractor
- type performed - preventive maintenance
- material cost - approved by
- location - requested by
- cost center

Equipment cost reports are to be generated on an as needed basis. The Contractor’s management team and School District maintenance personnel will often look at this information when a machine or piece of equipment has failed in order to determine whether to repair or replace the unit.
J. **School System Maintenance Cost Report**

Frequency: **Upon request**  
Recipient: **Administration**

The maintenance cost report for the School District should include all maintenance dollars spent for the entire Department for whatever date range requested. This report provides a detailed breakdown of how maintenance dollars are being spent. The following information, organized by the School, is to be found in this report:

- **location** - employee/contractor assigned
- **type of work** - trade or craft assigned
- **labor cost** - priority
- **labor hours** - date completed
- **material cost** - cost center

This report is to be prepared quarterly and submitted to the Administration or upon request. The Contractor’s management team will use this information on a daily basis as a tool for controlling maintenance costs.
WOODLAND HILLS SCHOOL DISTRICT

PROPOSAL FORM

Name of Company Submitting Proposal:

________________________________________________________________________

Address:

________________________________________________________________________

City: ___________________________ State: __________ Zip: ______________

Person Submitting Proposal:

________________________________________________________________________

Title of Person Submitting Proposal:

________________________________________________________________________

Date Proposal Submitted: ________________