

Bedford County Department of Finance

200 Dover Street, Suite 102
Shelbyville, TN 37160
(931)685-2024 FAX (931) 680-1029

Request for Proposal

Facilities Management Services

Bid No. 24-26

The Bedford County Department of Finance is requesting proposals for Facilities Management Services. **Sealed bids will be received until 2:00 p.m., Thursday, October 5, 2023**, in the office of the Bedford County Department of Finance and will be opened publicly at that time. The Department of Finance reserves the right to reject any and all bids and waive any irregularities for the purpose of ensuring that the award given is in the best interest of Bedford County. Any bids received after the scheduled closing time for receipt of bids will be returned to the bidder unopened.

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I. GENERAL BID TERMS AND CONDITIONS

Proposals from all responsible bidders will be considered. To qualify as a responsible bidder, the proposal submitted must:

- 1. Meet or exceed the minimum requirements specified.**
- 2. Furnish all documents requested by the representative of the Bedford County Department of Finance prior to and following the bid opening.**
- 3. Submit their completed bid prior to the bid opening date and time.**
- 4. Have bid name and bid number placed on the outside lower left corner of the sealed envelope containing the bid form. (Facsimile bids will not be considered.)**

Award

A Purchase Order from the Bedford County Department of Finance will be issued to the successful bidder acknowledging the award. A copy of these terms and conditions, specifications and the vendor's proposal form will become a part of the purchase order.

Prospective bidders may contact Robert Daniel, Bedford County Department of Finance, 931-685-2024, for any questions as to the specifications of the bid.

Lowest and/or best bid will be awarded.

Bid is for the period October 15, 2023, to September 30, 2024, with option to renew for up to four additional one year terms.

Other Considerations

Bedford County Department of Finance reserves the right to purchase only those bid items and quantities that conform to overall budgetary, functional, and performance constraints.

The terms of this bid will be extended to other local government agencies, other municipalities, and Boards of Education. Bedford County is responsible only for purchases made and received by Bedford County.

II. INSTRUCTIONS TO BIDDERS

All Proposals are to be made on the Proposal Form provided. Bids must be delivered in hand or by a mail service in a sealed envelope marked on the outside lower left corner, **Bid No. 24-26 Facilities Management Services.** Bids will be received and opened at **2:00 p.m., Thursday, October 5, 2023.** **Any bids received after the scheduled closing time for receipt of bids will be returned to the bidder unopened.**

Proposals are to be made complete in every detail as required and called for by said Proposal Form. Proposals that are incomplete, conditional, contain irregularities of any kind, or which are not in accord with the Instructions to Bidders and Proposal Form furnished by the Department of Finance may be rejected as informal.

The submission of a proposal will signify that the Bidder has thoroughly familiarized himself with all conditions and that he fully understands what will be expected of the successful bidder.

Pre-bid Meeting and site walk will be 10:00 a.m. September 21, 2023, in the office of Bedford County Department of Finance. This pre-bid meeting/site visit is mandatory for all firms wishing to submit a proposal for this contract.

The Department of Finance reserves the right to accept or reject in whole or in part any or all proposals submitted, without liability whatsoever, and waive informalities therein, if deemed by the Department of Finance in their best interest to do so.

III. OBJECTIVES

- A. **PURPOSE:** The purpose and intent of this Request for Proposals is to solicit sealed Proposals from qualified sources to establish a contract for the purchase of facility management services for specified departments and functions as outlined in this RFP (i.e. for the maintenance, custodial, and grounds departments) of Bedford County.

- B. **BACKGROUND:** With the expectation of producing high levels of service in an environment with decreasing resources, Bedford County foresees the necessity to explore the continuation of outsourcing its facilities management functions as it has for many years. To this end, Bedford County has determined that it is desirable to competitively solicit the services of professional specialized management firms to support and complement existing Bedford County personnel (i.e. maintenance mechanics, grounds workers and custodial personnel). The Bedford County Schools is a public school district with over 8,600 students and 1,100 employees. Total square footage currently is approximately 1,570,187 square feet. Bedford County Government has approximately 375 employees. Total square footage is approximately 157,845 square feet.

- C. **PERSONNEL:** It is intended that all (maintenance, grounds, custodial) employees will remain on the payroll of the Bedford County Department of Education and Bedford County Government. The successful facilities management contractor will supply management personnel and management support resources sufficient to comply with the facilities management functions called for in this RFP and as generally defined by the facilities management industry.

IV. **PROCUREMENT INTENT**

A. **STATEMENT OF NEEDS:**

1. The selected firm shall furnish all necessary management and resources (including but not limited to personnel, training programs, support, equipment, materials, and supplies) to provide ongoing management services, provide thorough and comprehensive ongoing analysis of facilities operations, develop a concept of operations, and implement a program to improve efficiency and effectiveness of the specified departments and functions of building maintenance, building custodial and grounds upkeep.
2. The selected firm shall furnish all necessary custodial chemicals and custodial equipment to maintain all Bedford County facilities in a clean and safe condition. Custodial chemicals will be supplied in adequate amounts and upgraded regularly. Chemical mixing stations shall be provided. The FMS contractor, at the start of the contract period, will upgrade all custodial equipment to new and will be responsible for any maintenance and repair parts during the useful life of the equipment as well as complete replacement at the end of useful life of said equipment.

- B. **GOALS:** The services performed by the FMS Contractor shall be accomplished within the framework of attaining the following goals established by the district.

REQUIRED-

1. The overall goal is to develop a program that will create and maintain a clean and safe environment for students and employees of Bedford County..
2. Determine and implement appropriate level of staffing for building maintenance, grounds and custodial operations for all district facilities.
3. Implement a system to improve productivity and encourage an employee philosophy of excellence, teamwork, and personal growth.
4. Enhance personnel development through a program of motivation, in- service education, and training.

5. Insure continuing quality performance through the utilization of specialized tools, equipment, technologies, and processes.
6. Establishment of a systems approach and quality assurance program to maintain and preserve desired level of service.
7. Establish benchmarks and best practices and a system for measuring effectiveness, improvements and progress.
8. Management of maintenance, grounds and custodial services in a cost effective manner.
9. Implementation of a proven and balanced Preventive Maintenance, Corrective Maintenance and Capital Preservation Program.

DESIRED-

10. Development of an Energy Management Master Plan and implementation of an energy management system for all district facilities.
11. Development of a capitalization plan for equipment used in the Maintenance, Custodial and Grounds Departments.
12. Technical Assistance with and coordination of construction projects.
13. Implementation of and ongoing maintenance of a physical inventory management plan.
14. A comprehensive electronic system (applications software along with hardware) to manage work orders, preventive maintenance, capital improvements, facilities scheduling, physical inventories and reporting.
15. As "green" and eco-friendly facilities operation as is feasibly possible.
16. An in depth knowledge of Fire safety codes and regulations, TOSHA codes and regulations, EPA and ADA codes and regulations along with experience with actual inspections performed by the TOSHA and Fire Marshall state inspectors.
17. An in dept knowledge of HVAC and control systems and equipment such as: boilers, chillers, and air handling units.
18. Overall knowledge of electrical systems including 3 phase systems primarily used for HVAC units, pumps and motors.
19. Verifiable experience in the successful management of 90 or more facility personnel and knowledgeable of Human Resource standards.
20. Facility Manager Certifications from BOMI (Building Owners and Management Institute) or other Facility Management Certificates will be preferred.
21. The ability to professionally and effectively communicate with Insurance adjusters, Architects, Engineers, School Board, School Administrators, County Officials Department Heads and Federal inspectors and agencies.

As noted – Goals 1 through 9 are required as a minimum. These goals are provided for informational purposes in an effort to support an understanding of established district objectives, Goals 10 through 15, although not a part of the minimum requirements, these goals are highly sought after by Bedford County. It is desired that the FMS Contractor will provide many of these services within the FMS contract. The proposals submitted should identify any/all capabilities the contractor would bring forth as part of a FMS contract.

C. PROPOSAL PREPARATION AND DOCUMENTATION:

Respondents to this RFP shall submit a written proposal which includes, but is not limited to, cost quotation for FMS as well as a thorough and comprehensive description of analysis, actual findings during RFP preparation process, recommendations, and subsequent action plan being proposed. This will form the basis of a proposal.

V. PREPARATION AND SUBMISSION REQUIREMENTS

A. GENERAL REQUIREMENTS: RFP Response- In order to be considered for selection, FMS Contractors must submit a complete response to this RFP.

B. COMPLETE RFP: Proposals shall be signed by an authorized representative of the FMS Contractor. Failure to submit all information requested may result in a lower evaluation of the proposal and/or rejecting it entirely. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiations.

C. FORMAT: Proposals should be prepared simply, but completely, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content. It is requested that the RFP be formatted in major sections:

1. A Company Overview
2. A proposed program concept
3. Training to be provided
4. New Technologies to be provided
5. Program to reduce school risk
6. Plans for performance improvement including benchmarks and measures of progress to be established
7. References
8. Additional Information the FMS Contractor may wish to provide, either in direct response to the Goals outlined above, or any other relevant information.

- D. ORAL PRESENTATION:** One or more FMS Contractors who submit Proposals in response to this RFP may be required to give an oral presentation of their Proposals. This provides an opportunity for the FMS Contractor to clarify or elaborate on the Proposals. This is a fact finding and explanation session only and does not include negotiation. The Director of Finance will schedule the time and location of these presentations if needed. It should be noted, however, that oral presentations are an option of Bedford County and may or may not be conducted.
- E. SPECIFIC REQUIREMENTS:** Proposals should be as thorough and detailed as possible so that the district may properly evaluate the FMS Contractor's capabilities to provide the required services. FMS Contractors are required to submit completely the following items:
1. The return of a complete RFP, fully responsive as requested.
 2. A minimum of five (5) customers for whom the company is currently providing management services of custodial, maintenance and grounds and where employees are on the customer's payroll (not the FMS contractor's payroll). K-12 public school references are preferable. Include the date(s) when service is performed, the business name, address, and the name and telephone of the Director of Finance.
 3. Evidence of experience in providing supportive facilities management services of the size and scope as described herein; including but not limited to experience in school employee/educational management, training, and research and development, for at least a ten year period.
 4. Evidence of financial stability. Include your firm's last two annual reports.
 5. Evidence of a support organization sufficient to deliver the proposed services. Include a chart demonstrating the organization that would support your firm's proposed program.
 6. Any other pertinent information which demonstrates the FMS Contractor's corporate capability to successfully perform management services.
 7. Indicate and identify those capabilities and resources produced within the contractor's organization versus those to be acquired through the use of third party employees or subcontractors. If subcontractors are to be employed in the performance of the specified services, provide a written narrative describing the rationale used for utilizing these resources for the purposes of this contract.

VI. EVALUATION CRITERIA

- A. Program Quality/Ability to Perform:** Criteria such as, but not limited to, the following will be considered - What type of support system does the company provide for its on-site management team? Will professional engineers be available within a reasonable period of time in the event they are needed for backup and technical assistance? How well does the program provide for a comprehensive employee development/training program; and is it integrated into the program, as opposed to being available "as needed"? How thoroughly does the program provide for written standards, procedures, schedules, and record keeping? To what degree does the program provide for a significant infusion of effort/resources during the start-up phase? How well will the program provide and maintain required work histories and expense accumulation data? How thoroughly does the program provide for quality control of the work performed? How well does the FMS Contractor's management plan fit into the current Bedford County organization structure? Does the company have its own resource and development capabilities? If so, where are they located? Can they be visited? Does the program provide for custodial equipment to be upgraded on a planned basis? Who is responsible for the gathering of the information necessary to implement the computerized maintenance program? How well known and viable, comprehensive and proven is the computerized maintenance program proposed?
- B. Performance Record:** Number of customers receiving supportive management services? How many are educational customers? What is the retention rate for services provided? How long has the company been providing such services as outlined in this RFP? What assessment did references provide when contacted by the Bedford County Department of Finance? Were financial projections met?
- C. Additional Resources:** What additional resources can the company provide in areas outside of the primary areas of consideration? The firm must currently be providing these services to other facilities.

VII. GENERAL SPECIFICATIONS

PRIMARY AREAS OF RESPONSIBILITY: Provide supervisory, administrative and technical direction to facilities' staff for the support of the Custodial, Grounds and Maintenance functions (such direction will include, but not be limited to direct supervision of the Custodial, Grounds and Maintenance departments employees to maintain the buildings and grounds in an acceptable condition); to control the cost of labor and materials; to provide a total employee training program; maintain continuous availability of trained and experienced managers and technical support; furnish all custodial chemicals and equipment. The successful FMS contractor shall provide a full-time on-site Maintenance Manager and a full-time Custodial Manager to manage and direct the FMS program and regularly report to the Bedford County Superintendent of Schools and the Bedford County Mayor regarding needs and progress. Such manager shall be required to pass a background check and possess/maintain a valid Tennessee Driver's License and must be a resident of Bedford County, Tennessee during the entire contract period. The Superintendent of Schools and the County Mayor shall retain the right to request of the successful company the replacement of any assigned manager(s) for whatever reason he/she deems sufficient. The successful company shall also provide technical and management support as requested by the Superintendent of Schools and the County Mayor

VIII. BUILDING MAINTENANCE MANAGEMENT SPECIFICATIONS

- A. SCOPE:** The performance of this contract will include, but not be limited to, supportive management and assistance of maintenance duties.
- B. PREVENTIVE MAINTENANCE:** Oversee a sound preventive maintenance program, including use of a computerized preventive maintenance system, on all major electro/mechanical equipment. Such program and system is subject to the prior approval of the Director of Finance.
- C. WORK ORDER SYSTEM:** Establish and maintain a work order system that will be used in requesting maintenance work and will serve as a means of instruction of work to be done. The system must record the cost and completion date of each work order. Historical corrective maintenance records on equipment, by building, will be made available by request from the Superintendent of Schools, County Mayor and/or the Director of Finance. Such program and system is subject to the prior approval of the Superintendent of Schools or County Mayor and the Director of Finance.

D. ADMINISTRATIVE, FINANCIAL AND MATERIALS MANAGEMENT:

1. Budgets: The Director of Finance will request the preparation of necessary budgets, the analysis and explanation of variances of actual expenditures as compared with budget and the provision of financial and statistical data as requested.
2. Purchasing: In accordance with Bedford County Financial Management Policies and Procedures, provide consultation and technical advice in preparation of specifications for procurement of parts, supplies and services incidental to operations as requested. Recommend vendors as necessary.
3. Receipt-Storage-Issuance of Materials: Provide consultative and technical advice regarding the receipt, inspection, storage, safeguarding, and issuing of materials or items purchased.
4. Equipment Replacement/Performance: Recommend annually or more often, if necessary, the needs for replacement of capital equipment. Also, make recommendations for changes in existing equipment, or measures to extend its useful life or performance, as appropriate.
5. Regulatory Requirements: Recommend programs to ensure all Bedford County facilities comply with local, State and Federal regulations and other regulatory agencies, as they apply to the operation of maintenance and engineering.

E. FUNCTIONAL SAFETY AND RISK MANAGEMENT:

1. Assist in the collection of available documentary evidence of structural safety and building safety compliance (such as Statement of Construction and Fire Protection) as needed for accreditation requirements.
2. Maintain on file documents and certification of compliance with the requirements of applicable local, Federal and Fire Marshal laws and regulations.
3. Make recommendations to the Superintendent of Schools and the County Mayor to facilitate Compliance with applicable building codes, fire prevention codes, State of Tennessee and/or Federal Occupational Health and Safety Codes, and Life Safety codes.
4. Maintain good safety practices within the Maintenance and Operations Departments and keep equipment, spaces and shops in tidy condition.
5. As requested, assist the district in preparation of its external and internal disaster planning and emergency operations procedures.

- F. QUALITY CONTROL OF SERVICES:** Provide the following quality/ performance reviews:
1. Periodic routine facility inspections will be made by the FMS contractor. These inspections will be documented and supplied to the Superintendent of Schools and the County Mayor. These inspections may be in the company of a representative from the County at the Administration's discretion.
 2. Records of work accomplished in the Maintenance and Operations Department will be maintained for review by the Superintendent of Schools, County Mayor and/or the Director of Finance upon request.
 3. It is agreed that the Director of Finance shall retain complete and final jurisdiction in all determinations of the quality of services provided by the FMS Contractor.

- G. ADDITIONAL REQUESTS:**
1. Fully developed training and in-service programs for all employees.
 2. Written standards, procedures, schedules, daily journals and other records required by regulating and accrediting agencies and good business management practices and/or as may be required by the Bedford County Department of Finance.
 3. Operating instructions for all major mechanical equipment.
 4. Individual and preventive maintenance instructions for each preventive maintenance requirement.
 5. A National Manufacturers index for items, parts, supplies and equipment.
 6. Personnel available on a scheduled and on-call basis, to provide effective quality, technical support and consulting capabilities. All such support personnel will be on the FMS Contractor's payroll.

IX. CUSTODIAL SPECIFICATIONS

As a part of this program, the FMS Contractor shall provide all custodial chemicals and equipment. Said supplies and equipment will adhere to a "Green" program as much as is feasible. The FMS Contractor will also manage acquisition of all toilet tissue, paper towels, plastic receptacle liners and hand soap and other disposable supplies with a preference for a Green program.

1. Provide support involving the standardization of the custodial program.
2. Provide training, management and direction of all custodial personnel in the performance of their respective custodial duties.
3. Assist in the administrative functions relating to district's custodial personnel.

4. Select and order the necessary supplies and equipment for the custodians to use for proper performance of their duties as a part of the custodial program.
5. Provide and maintain training equipment, films, slides, videos, literature, daily work schedules, project schedules and training manuals to be used in the training of custodial personnel.

X. GROUNDS MANAGEMENT SPECIFICATIONS

FMS Contractor shall develop, implement and manage an effective program of grounds maintenance for all district facilities. The program shall be designed to promote the overall attractiveness of the grounds as well as the safe and enjoyable use of athletic and recreational facilities. All procedures will be in accordance with established environmental protection policies and shall be in line with the district's budget. The levels and frequency of care shall be established by mutual agreement between FMS Contractor and Bedford County and will be based on specific use, relative impact on overall appearance and safety factors. The following services will be managed by the FMS Contractor: mowing, aeration, turf fertilization, weed control, turf repair, irrigation, tree care, care of shrubs and groundcovers, care of shrub beds, flowers, field lining, tracks and in-field maintenance, playgrounds, fence lines and signage, field and landscape structures, disposal of landscape waste, refuse pick up and recycling, paved surface care, project work/ new installations, exterior set- ups and special events, snow removal, grounds management planning calendar, training/ certification, grounds inspections.

XI. CONTRACT TERMS AND CONDITIONS

Submission should include a sample copy of your contract terms and conditions. Contract term shall be for one (1) year with four (4) optional one (1) year extensions between the Bedford County Department of Finance and the FMS contractor. Bedford County seeks a contract to have a mutual termination clause of 90 days for any reason. Contract cost should be a fixed price all inclusive for the initial term.

All proposals shall be accompanied by an insurance certificate with the following requirements:

- Commercial General Liability \$1,000,000 per occurrence \$2,000,000 aggregate.
- Workers compensation \$500,000/\$500,000/\$500,000
- Commercial Automobile \$1,000,000 combined single limit

XII. DESCRIPTION OF FACILITIES

SCHOOLS:

Adult Education	2,700
Bedford County Learning Academy	11,440
Cascade Middle School and Field House	105,904
Cascade High School	128,000
Cascade Elementary School	77,423
Central High School	234,359
Community Middle and Elementary	187,606
Community Middle and Elementary Portables	3,200
Community High School	131,069
Community High Portables	1,600
Eastside Elementary	56,605
Eastside Elementary Portables	6,400
Eakin Elementary	64,551
Eakin Elementary Portables	8,000
Harris Middle School	152,000
Harris Middle Field House	2,077
Learning Way	80,600
Liberty School	80,987
Liberty School Portables	6,200
Southside Elementary	52,400
Southside Elementary Portables	6,400
Thomas Magnet	66,536
Vocational Annex	51,000
Central Office	36,650
Maintenance Department	10,000
Transportation Department	6,480
Total Existing Square Footage	<u>1,570,187</u>

Additional:

Cartwright Elementary will open August, 2024	126,000
Thomas Magnet School addition opening January, 2025	4,000
Liberty School addition opening January, 2025	<u>12,000</u>

Total School Facilities Square Footage 1,712,187

COUNTY FACILITIES:

Courthouse	22,957
Courthouse Annex	26,400
Bedford County Business Complex	35,969
Ag Center and NRCS Building	1,519
Justice Center	<u>71,000</u>

Total County Facilities Square Footage 157,845

XIII. PROPOSAL SUBMISSION SHEET

In compliance with this Request for Proposals and to all the conditions detailed herein, by signing the Proposal Submission Sheet (pages 16-17) the below-signed offers and agrees to furnish the services in accordance with this. A valid proposal shall consist of:

- A. Return a full copy of this RFP document, including return of a completed and signed Proposal Submission Sheet (pages 16-17)
- B. Inclusion of a separate signed narrative document following the format as outlined above in Sections III-C and III-E. Special emphasis should be made to show -
 - 1. how the FMS contractor responds to the Goals outlined in section II-B by identifying any/ all capabilities the contractor would bring forth either as part of a FMS contract or as an extra capability of the FMS contractor available under separate contract.
 - 2. indicate the specific custodial equipment to be installed as part of the contact, how the custodial equipment investment will be amortized over the life of the contract and whether there are options regarding the assignment of ownership of said equipment to Bedford County at the end of the contract.

The issuance of this document and receipt of information in response to this document will not cause the Bedford County to incur any liability or obligation to FMS contractors, financial or otherwise. Bedford County assumes no liability or obligation to reimburse or in any way compensate FMS contractors for expenses incurred in connection with a response to this RFP.

The Bedford County Department of Finance reserves the right to use information submitted in response to this RFP in any manner it may deem beneficial to the Bedford County. Any materials or information submitted by FMS contractors that are considered confidential must be clearly marked as such. In the event that confidentiality cannot be afforded, the FMS contractor will be notified and will be permitted to withdraw its proposal.

Pricing information supplied as part of any proposal must be valid for a minimum of 120 days.

**TO: Bedford County Department of Finance
 200 Dover Street, Suite 102
 Shelbyville, Tennessee 37160**

Re: Bid No. 24-26

Gentlemen,

Having examined the specifications for **Facilities Management Services**, we (I) submit the following proposal.

Cost Quotation- for all items contained in all sections in the RFP (i.e. FMS including management of maintenance, custodial and grounds departments as well as custodial equipment & supplies):

	<u>Schools</u>	<u>County</u>	<u>Total</u>
Year 1	\$ _____	\$ _____	\$ _____
Optional Year 2	\$ _____	\$ _____	\$ _____
Optional Year 3	\$ _____	\$ _____	\$ _____
Optional Year 4	\$ _____	\$ _____	\$ _____
Optional Year 5	\$ _____	\$ _____	\$ _____

Cost Break Out - break out for each building the custodial equipment & supplies included in the numbers above:

Location	Year 1	Year 2	Year 3	Year 4	Year 5

Company Name: _____

Mailing Address: _____

Signature and Title of bidder: _____

Email: _____

Telephone Number: _____

Name of Contact: _____