



REQUEST FOR PROPOSAL:
Custodial and Grounds Maintenance Services

Proposals Due: 5:00 p.m. EST Wednesday, May 15, 2019

Submit Proposal Electronically to:

Core Management Services: bfay@coreamerica.com
Orange County Schools, Hillsborough, North Carolina: sara.pitts@orange.k12.nc.us;
nick.mincey@orange.k12.nc.us

Primary RFP Contact:

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1 PROJECT OVERVIEW AND BACKGROUND

1.1 Project Overview

This Request for Proposal (RFP) solicits proposals to provide custodial and grounds maintenance services to select Orange County Schools, located in Orange County, North Carolina (hereinafter referred to as “OCS”). Service Providers may submit a custodial proposal or grounds proposal only, or may propose both services.

The objective of this RFP process is to identify Service Providers capable of providing custodial and grounds maintenance services at the most competitive prices and at the highest consistent quality to OCS. This is merely a Request for Proposal and is not to be construed as an offer to enter into a contract. Moreover, OCS may supplement, amend, or withdraw this RFP at any time.

Financial considerations are important but will not be the sole determinant of the award. Within this RFP, OCS challenges respondents to carefully study and research the unique aspects of its buildings, statements of work, and specifications and to submit proposals that demonstrate the Service Provider’s ability to maintain best-in-class quality levels.

The project’s requirements are more fully described in Exhibit E, statements of work and specifications.

1.2 Key Terms

This RFP includes the following key terms:

Agreement – the contract or agreement resulting from this RFP process

Service Provider – a person, partnership, company or corporation which offers custodial and grounds maintenance services as described herein in exchange for payment. Synonymous with contractor, respondent, proposer, bidder, etc. herein

1.3 Background Information

Orange County School District is a public-school district located in Hillsborough, North Carolina. It has approximately 7,600 students in grades K-12. Although primarily outsourced, the district still self-performs custodial and grounds maintenance services for select buildings and shifts. **Table 1** indicates the buildings and services included in this RFP (all services marked “X” are applicable for this RFP).

Building	Custodial – Days	Custodial – Evenings	Grounds Maintenance
Elementary Schools			
Cameron Park Elementary			X
Central Elementary	X	X	X
Efland-Cheeks Elementary		X	X
Grady Brown Elementary			X
Hillsborough Elementary		X	X
New Hope Elementary			X
Pathways Elementary		X	X
Middle Schools			
A. L. Stanback Middle School		X	X
C. W. Stanford Middle School	X	X	X
Gravelly Hill Middle School		X	X
High Schools			
Cedar Ridge High School	X	X	X
Orange High School	X	X	X

Table 1: Orange County Schools building list for RFP

These buildings are non-union and require varying types of services. For a detailed list of pertinent building information, please refer to **Exhibit A: Building Information**.

Building drawings (where available) accessible via a Dropbox link. These drawings are not to be shared with any outside parties or to be used for any other purposes than those stated in this RFP.

PROPOSAL INSTRUCTIONS AND CONDITIONS

1.4 Intent

It is the intent of OCS, through this RFP and contract conditions contained herein to establish, to the greatest extent possible, complete clarity regarding the requirements of both parties to the Agreement resulting from this RFP. Only Service Providers with relevant experience and the ability to provide world-class services in a timely fashion are encouraged to submit proposals.

All proposals must include all materials, labor and services necessary to meet or exceed specifications described herein. Proposals for services that deviate from these specifications may be considered invalid.

The following goals and objectives are the primary factors driving this RFP process. Service Provider's response should provide ideas, programs, procedures or solutions related to each specific goal:

- Maintain a healthy and safe environment for the people who visit, study or work in OCS buildings and schools
- Provide the required service levels, as described herein, while achieving optimal cost efficiencies through best-practice management, use of labor-saving equipment and technology, and volume purchasing
- Provide the appropriate staffing levels to achieve high-quality outcomes
- Maximize customer satisfaction and minimize service-related complaints
- Ensure cleaning consistency and well-maintained grounds for district buildings
- Minimize OCS's required oversight and involvement with custodial and grounds maintenance operations, through proactive management and higher employee productivity
- Ensure energy-efficient and environmentally-friendly custodial and grounds maintenance programs

1.5 Schedule of Events (2019)

EVENT	DATE
RFP released to bidders	April 23
Mandatory pre-bid conference call	11:00 a.m. EST April 24
Optional bid tours	9:00 a.m. EST April 25 (Custodial) and April 26 (Grounds). Meet at Orange High School both days
Clarification requests from bidders due	May 3
Responses sent to all bidders	May 7
Proposals due	5:00 p.m. EST May 15
Finalist interviews	May 29 (if required)
Select recommended winner(s)	June 3
Receive OCS Board approval	June 10
Execute contract	Mid-June
Contract commencement date	August 1, 2019

Table 2: Orange County Schools RFP Schedule of Events

1.6 RFP Meeting and Building and Grounds Tour

OCS, with the assistance of Core Management Services, will conduct a MANDATORY RFP pre-bid conference call on April 24, 11:00 a.m. EST. Details below:

- Conference Call: 866-866-2244 Code: 6397920#
- Screen sharing link: www.coreamerica2.glance.net Session Key: 1357

The purpose of the meeting will be to review the RFP documents and to answer questions about the process and the specifications.

The optional tours of OCS buildings and grounds will be held as follows:

- Custodial: 9:00 a.m. EST, Thursday, April 25 – Meet in Orange High School Lobby
- Grounds: 9:00 a.m. EST, Friday, April 26 – Meet in Orange High School Lobby
- The tour of OCS buildings and grounds will involve outdoor travel; please dress accordingly

Service Providers are limited to **two attendees per company**. Service Providers are expected to have examined the buildings and/or grounds prior to submitting their proposals. Failure to do so will not relieve the Service Provider from providing any product or

performing any labor or services that may be required to carry out the intent of the Agreement.

1.7 Proposal Clarification Requests

Clarification requests will be accepted via email only (see RFP contacts listed on the cover page). Include a reference to the line and section/subsection number(s) being addressed. Responses to clarifications will be shared with all Service Providers that were invited to submit a proposal. OCS will not be bound by any oral responses.

1.8 Proposal Response Format

Proposals must follow the format designated in section 2. Proposals not complying with this format may be considered non-responsive and may be removed from consideration on this basis.

1.9 Requirements for Signing Proposal

Each Service Provider, by making a proposal, represents that this document and all attachments have been read and fully understood.

The proposal must include an electronic signature by an individual authorized to legally bind the person, partnership, company or corporation submitting the proposal (see **Exhibit D: Signature Affidavit**).

1.10 Deadline for Proposals

Proposals must be submitted via email and will be received until **5:00 p.m. EST May 15, 2019; it is the Service Provider's responsibility to verify successful transmittal**. Proposals shall be emailed to the RFP contacts on the cover page of this document. Proposals submitted via email that are blocked by a security system may not be considered as received on time.

Additionally, the email copy should not be larger than 20 MB. If the Service Provider's proposal is larger than 20 MB, the Service Provider can: 1) break the file up into separate emails, 2) save the proposal into a .zip file and email the .zip file, or 3) use a free website such as www.transferbigfiles.com to send the large file.

1.11 Term of Agreement

Pricing for this Agreement shall be based on a term of three (3) years, plus three (3) optional years. The Agreement shall be **fixed-price** for each individual contract year. The Service Provider's proposed pricing shall reflect any upcoming changes to wages and other wage/benefit increases. Therefore, the Service Provider's proposed pricing shall include blended rates for each year that account for any wage/benefit increases within each

individual contract year. Requests for pricing increases beyond those proposed in the Pricing Workbook(s) will not be granted.

The projected three-year custodial and grounds maintenance services Agreement(s) will commence on August 1, 2019 and will end on June 30, 2022.

1.12 Right to Request Additional Information

OCS reserves the right to request any additional information which is deemed necessary at any point during this RFP process. Moreover, OCS reserves the right to ask for additional information or pricing from one, many or all participating Service Providers and may adjust or negotiate the terms, requirements and/or specifications at any point during the RFP process with any Service Provider.

1.13 Proposal Preparation Costs

The Service Provider is responsible for all costs incurred by the Service Provider or his/her subcontractors in responding to this RFP.

1.14 Standard Forms and Contracts

Any forms and contracts the Service Provider proposes to include as part of any Agreement resulting from this RFP **must** be submitted as part of the Service Provider's proposal. Any forms and contracts not submitted as part of the Service Provider's proposal and subsequently presented for inclusion may be rejected. This requirement includes but is not limited to the following types of forms: subcontractor, franchise, warranty agreements, maintenance contracts, and support agreements.

Note: Service Provider may not subcontract without express written approval from OCS.

1.12 Selection Criteria

OCS will evaluate proposal based upon the Pricing Workbook(s), the technical abilities and responses as presented in the Technical Submittal, the Service Provider's ability to demonstrate adequate insurance coverage, Service Provider's past performance and/or service reputation, competitive employee compensation plans to minimize turnover, service capability, quality of the Service Provider's employees or services, transition plan, adequate management structure, commitment to world-class customer service, references, the extent to which the Service Provider's employees or services meet OCS's needs, total long term cost to OCS, and any other relevant criteria stated elsewhere herein. OCS may elect to establish alternate selection criteria to protect its best interests or meet performance or operational standards at any point in this RFP process. Selection of a successful Service Provider will be at the sole discretion of OCS.

1.13 Selection Process

OCS management will evaluate, rate and select finalists based on the written information provided in each Service Provider's proposal.

Finalist Service Providers may be required to participate in a presentation and interview process in which OCS and Core representatives will further inquire about the Service Provider's qualifications and experience. Service Providers may also be asked to provide a brief overview of their organization, key personnel and explain how they would approach OCS's expectations for high-quality service outcomes.

If OCS is unable to successfully negotiate and execute a contract for services with the company offering the highest ranked proposal, OCS reserves the right to revisit other Service Provider's proposals.

1.14 Federal or State Sales, Excise or Use Taxes

OCS is NOT a tax-exempt institution. Service Provider shall include all applicable taxes in the completed Pricing Workbook(s).

1.15 Invoicing

The Service Provider shall provide a monthly invoice for each installment due from OCS for the base custodial and/or a separate monthly invoice for base grounds maintenance services.

On a separate invoice, the Service Provider shall include any additional billing above and beyond the base contract(s) (events, special coverage, etc.) with the details attached (event description, service hours, and hourly price). All additional billing requires prior approval from OCS.

1.16 Invoicing for In-House Custodial Supplies, Equipment and Consumables Products

In the interest of product standardization and safety, Service Provider shall order custodial supplies, equipment and consumables on behalf of in-house custodial staff on a scheduled basis (on the same schedule as the Service Provider's internal orders). Service Provider shall bill OCS directly for these purchases on a separate invoice. Invoice shall be accompanied with a detailed report of costs by product, quantity, unit price, extended price, and any cost markup if applicable. Refer to the Custodial Statement of Work for more information (**Exhibit E**).

1.17 Custodian Wage Stipulations

OCS has mandated a minimum base wage for day-time and night-time custodians of no less than \$10.00 per hour.

1.18 Custodial Site Management Stipulations

OCS is requiring the successful Service Provider to employ AT LEAST one (1) non-cleaning day manager and one (1) non-cleaning night manager, with the opportunity to clean if needed. May be part-time positions if Service Provider is not awarded all schools.

Site management will be required to maintain a detailed monthly record of staffing, specifically employee hours worked by day to verify that OCS receives staffing levels consistent with Service Provider's pricing as indicated in the Custodial Pricing Workbook (**Exhibit C**) and the requirements listed herein. Failure of the on-site managers to demonstrate that adequate staffing is maintained on a monthly basis throughout the life of the Agreement may be grounds for termination.

1.19 Monthly Insufficient Custodial Staffing Penalty

Service Provider must maintain the number of custodial labor hours as proposed in the Custodial Pricing Workbook (**Exhibit C**) in each month of the Agreement. If actual monthly custodial labor hours, for all services included in the base specification, fall below 85% of the proposed custodial labor hours as indicated by in the Custodial Pricing Workbook (**Exhibit C**) for any month of the Agreement, a 2% penalty of that month's total invoice value shall result. It is the responsibility of the Service Provider to verify adequate monthly staffing to OCS upon request.

The insufficient staffing penalty outlined above is in addition to the 2% non-compliance penalty established in the Custodial Statement of Work (**Exhibit E**). If the Service Provider is subject to both penalties in any month of the Agreement, the insufficient staffing penalty shall be applied subsequent to the non-compliance penalty outlined in the Custodial Statement of Work (**Exhibit E**).

1.20 Subcontractors

No subcontractors will be used without OCS approval.

1.21 Right of Refusal

OCS reserves the right to reject any or all proposals, either in whole or in part, or to waive any informalities or irregularities therein that are in the best interest of OCS. OCS reserves the right to cancel, modify or delay this RFP process, for any reason.

1.22 Turnkey Solution

The proposal price will be the total dollar amount for all services, materials, equipment and labor to satisfy the terms and requirements stated herein. The proposal amount is to be held firm for at least one hundred and twenty (120) days from the proposal opening date. All prices quoted must include all labor, supervision, equipment, supplies and cleaning

materials necessary to perform custodial and/or grounds maintenance services that are compliant with the requirements and specifications stated herein.

1.23 Proposal to Become Part of Agreement

This RFP, Service Provider's response and any subsequent written communications, along with any formal, signed Agreement will become part of the Agreement documentation governing performance of this project. Where conflicts exist, the later dated document shall govern.

1.24 Confidential Information

Information contained in the Service Provider's proposal that is company confidential must be clearly identified in the proposal itself. OCS will be free to use all information in the Service Provider's proposal for its own purposes.

2 PROPOSAL RESPONSE FORMAT

2.1 Introduction

To facilitate the analysis of responses to this RFP, Service Providers are required to prepare their proposals in accordance with the instructions outlined in this section.

Proposals shall be prepared as simply as possible and provide a straightforward, *CONCISE* description of the Service Provider's capabilities to satisfy the requirements of the RFP. *EMPHASIS SHOULD BE PLACED ON ACCURACY, COMPLETENESS, AND CLARITY OF CONTENT.* All parts, pages, figures, and tables should be numbered and labeled clearly.

The proposal shall be organized as follows:

- Executive Summary (please limit to 2 pages)
- Answers and documentation for each request/question within **Exhibit B: Technical Submittal**
- A completed **Exhibit C: Pricing Workbook(s)**
- A completed **Exhibit D: Signature Affidavit**
- Any additional supporting documentation that would indicate the Service Provider's ability to meet any of the requirements stated in this RFP (please limit to 8 pages)

2.2 Executive Summary

This section of the response to the RFP should be limited to a brief narrative not to exceed two (2) pages, describing the Service Provider's proposed solution. The Executive Summary must not include cost quotations.

2.3 Technical Submittal Requests and Questions

The Technical Submittal (**Exhibit B**) contains multiple requests and questions designed to provide the Service Provider the opportunity to present its management plan, differentiators, expertise and professionalism. Each question should be answered as **clearly** and **concisely** as possible, with supporting documentation included as attachments.

2.4 Pricing Workbook(s)

Pricing should be presented using the included full-disclosure pricing workbook(s) only. General instructions for pricing can be found in Section 4.

2.5 Signature Affidavit

In the Signature Affidavit, the Service Provider will attest that they did not participate in any collusion and that they agree with the terms and conditions stated herein.

2.6 Additional Supporting Documentation

Service Providers are to use the final section of the Technical Submittal (**Exhibit B**) to provide additional information. The contents of this section must be **clear, concise, and relevant** to this RFP.

3 TERMS AND CONDITIONS

3.1 Standard Insurance Requirements

OCS's standard insurance requirements (**Exhibit G**) shall be accepted by the Service Provider. The successful Service Provider shall furnish a certificate of insurance that fulfills OCS's insurance requirements.

3.2 Confidentiality

The final contract will acknowledge the possibility that notwithstanding the restrictions that this RFP places on employees of the Service Provider reading materials left on desks, file cabinets, etc., it is possible that the Service Provider or employees of the Service Provider may inadvertently receive Confidential Information of OCS, OCS students, and OCS staff while performing services. Accordingly, such employees shall: (a) keep the Confidential Information confidential, (b) use Confidential Information only for purposes of fulfilling the Service Provider's obligations and exercising the Service Provider's rights hereunder, and (c) disclose such Confidential Information only to the Service Provider's employees who have a need to know and only for the purposes of providing services, or (d) to the extent required by law. As used herein, "Confidential Information" means information in the possession or under the control of OCS of a proprietary nature relating to the technical, marketing, and/or business affairs of OCS, or proprietary and trade secret information, in each instance whether in oral, graphic, written, electronic or machine readable form, and, in addition, shall include any information constituting an educational record under the Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g, and its implementing regulations ("FERPA"). Confidential Information shall not include information that: (a) the receiving party possesses prior to acquiring it from the other, (b) becomes available to the public or trade through no violation by the receiving party of this paragraph, (c) is given to the receiving party by a third party not under a confidentiality obligation to the disclosing party, (d) is developed by the receiving party independently of and without reliance on confidential or proprietary information provided by OCS.

3.3 Indemnity

The final contract shall require the Service Provider to defend through counsel of its own choice, indemnify, and hold harmless OCS and its officers, directors, affiliates, and employees from any and all third party claims, demands, liabilities, costs or expenses, including reasonable attorneys' fees and costs, and reasonable costs of investigation, resulting from the Service Provider's (i) material breach of any obligation, duty, representation, or warranty contained in the final contract; or (ii) negligent act or omission, or willful misconduct, while its agents are on the property of OCS for any reason or while providing the services requested under this RFP.

4 PRICING

4.1 General Assumptions

- It shall be assumed that the pricing submitted by each Service Provider is sufficient to meet or exceed all specifications, terms and conditions stated in this RFP document and exhibits
- OCS assumes that the prices listed in the Service Provider's proposal are the most competitive quotes it can offer, both at the outset of the relationship and on an ongoing basis. OCS expects to work together with its Service Providers to continually identify opportunities to achieve cost reductions
- OCS will not accept any additional charges other than those indicated in the full-disclosure pricing workbook(s) of the Service Provider's proposal
- Contracts are being bid as **fixed-price** contracts and **will remain fixed** for the entire term of the Agreement
- The Service Provider's proposed pricing **shall incorporate all anticipated changes to wages or benefits within each contract year**. Therefore, Service Provider's proposed pricing shall include blended rates for each contract year that account for any increases during that year
- Additional services will be billed at the applicable rate/cost as indicated in the miscellaneous pricing section
- OCS has mandated a minimum base wage for day-time and night-time custodians of no less than \$10.00 per hour.
- OCS is requiring the Service Provider to employ AT LEAST one (1) non-cleaning day manager and one (1) non-cleaning night manager. May be part-time positions if Service Provider is not awarded all schools.
- OCS is NOT a tax-exempt institution. Service Provider shall include all applicable taxes in its completed Pricing Workbook(s).
- Prompt payment discounts and volume discounts will be viewed favorably

4.2 General Instructions for Completing the Pricing Workbooks (Exhibit C)

- Use MS EXCEL version 2003 or later. **DO NOT submit as PDF**
- Service Provider shall **ONLY** complete those cells with **blue font**. All other cells are generated by automatic formulas. Any cell left blank shall be assumed to be a no-bid for that particular product or service
- Service Provider shall be liable for any costs incurred by OCS or Core as a result of a virus being passed through an infected file

4.3 Alternative Proposal (s)

If the Service Provider believes that it can offer alternatives that may be more favorable to OCS than those included in this RFP, the Service Provider should include information on these alternatives as separate attachments to their proposal.

5 EXHIBITS

Exhibit A: Building Information



Exhibit A-Building
Information.xlsx

Building plans provided via Dropbox link

Exhibit B: Technical Submittal



Exhibit B-Technical
Submittal.doc

Exhibit C: Pricing Workbooks



Exhibit C-Custodial
Pricing Workbook.xl



Exhibit C -Grounds
Pricing Workbook.xl

Exhibit D: Signature Affidavit



D- Signature
Affidavit.doc

Exhibit E: Statements of Work / Specifications



Exhibit E-Custodial
SOW.docx



Exhibit E-Cleaning
Specifications.doc



Exhibit E-Grounds
Maintenance SOW.c

Exhibit F: Green Cleaning Policy



Exhibit F-Green
Cleaning Policy.doc

Exhibit G: Standard Insurance Requirements

Pending