



NEW HAVEN PUBLIC SCHOOLS

Operations Memorandum

To: New Haven Board of Education Finance and Operations Committee
From: Thomas Lamb, Chief Operating Officer
Date: March 27, 2023
Re: Renewal of Agreement with ABM Industry Groups, LLC to provide facilities management, custodial and energy management services

Answer all questions and have a representative ready to present the details of each question during the Finance & Operations meeting or this proposal may not be advanced for consideration by the full Board of Education.

Company Information		
Vendor Name:	ABM Industry Groups, LLC	
Doing Business as: (DBA)	ABM	
Vendor Address:	PO BOX 643823, Pittsburgh, PA 15264-3823	
Vendor Contact Name:	Joe Lops	
Vendor Contact Email:	Joe.Lops@abm.com	
Is the contractor a minority or women owned small business?		No
Agreement/Contract Information		
New or Renewal Agreement/Contract?		Renewal Option 1 of 3
Effective Dates: (mm/dd/yy) <small>Multi-yrs. require Board of Aldermen approval</small>	From July 1, 2023	To June 30, 2024
Total Amount: <small>If Multi-yr. include yr. to yr. breakdown</small>	\$1,847,093.00	
Funding Source Name: Acct. #:	2023-2024 Operating Budget 19047400-56694	
Contract #: <small>(Local or State)</small>	Year 1 - A22-1633	



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Key Questions:

1. What specific service will the contractor provide:

The New Haven Public Schools has engaged the services of a private company to manage and direct its district, facilities management, custodial services, energy management, and environmental health and safety.

2. How was the contractor selected? **Attach appropriate supporting documents*

- ☐ Quotes
- ☐ Sealed Bid # _____
- ☐ Sole Source # _____
- ☒ RFP# 2022-05-1456
- ☐ State Contract # _____
- ☐ Exempt Professional
 - ☐ Accountant
 - ☐ Actuary
 - ☐ Appraiser
 - ☐ Architect
 - ☐ Artist
 - ☐ Dentist
 - ☐ Engineer
 - ☐ Expert Professional Consultant
 - ☐ Land Surveyor
 - ☐ Lawyer
 - ☐ Physician/Medical Doctor

3. If the vendor was selected through Solicitation (Bid/RFQ/RFP) process; answer the following:

a. Please explain how the vendor was chosen? **Attach Vendor Proposal*

RFP-2022-05-1456; ABM is committed to providing the New Haven Public Schools a program that will implement the latest Facilities Management industry developments and technologies in a forward-thinking process that brings the vast experience of their client base together with proven programs for building operations.

b. Who were the members of the selection committee? *(Minimum 3 members required)*

Dr. Michael Finley, Chief of Staff
Dr. Paul Whyte, Asst. Superintendent
Thomas Lamb, Chief Operating Officer
Michael Gormany, Acting Controller
Giovanni Zinn, City Engineer



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Key Questions: - Continued

4. If this is a renewal with a current vendor, has the vendor has met all obligations under the existing agreement/contract?

The new facilities team has met the obligations of its agreement.

5. If this agreement/contract is a Renewal, has the cost increase? If yes, by how much?

As proposed in the submission 2022-2023 this renewal year will include an increase of 3.9% or \$71,042.00.

6. If this new agreement/contract, has cost for service increased from previous years? If yes, by how much?

N/A – Renewal

7. Is this a service that existing staff could provide? Why or why not?

No, this is a service that has always bid out to provide facilities management services to the district for its properties.



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Agreement/Contract Processing Checklist

To ensure timely processing of the submitted Agreement/Contract it is imperative to collect and provide all of the required documentation noted below and provide with submission to board.

Forms/Documents are available in: Drive G:\F&O Agenda Minutes\Agreement Contract Checklist\2022-2023

1. Has this vendor performed service(s) in prior fiscal years?	
If Yes,	Vendor # <u>13745</u>
If No or New,	Vendor must provide completed W9
2. A quote or proposal submitting regarding the agreement/contract.	
If RFP	Attach Vendor Submitted
Other	Copy of State Contract, Quotes, etc.
3. <u>Certificates of Liability Insurance (COI) are required for ALL agreements/contracts, read the following and select the applicable Rider.</u> It is the submitters responsibility to request the COI from the vendor and attach with submission; the COI from the Vendor <u>must match rider specifications outlined.</u> Failure to obtain or incorrect COIs will be returned for revision and will delay its processing.	
Rider 300	Professional Services – Onsite Umbrella; w/ Auto; w/ Workers Compensation
Rider 305	Professional Services – Onsite Umbrella; No Auto; No Workers Compensation
Rider 310	Professional Services – Onsite Umbrella; w/ Auto; No Workers Compensation
Rider 315	Professional Services – Onsite Umbrella; w/ Youth under 21
Rider 320	Professional Services – Offsite; No Auto; No Workers Compensation
Rider 325	Professional Services – Offsite; No Auto; No Workers Compensation; w/ Youth under 21
Rider 330	Professional Services – Offsite Attorney; No Auto; No Workers Compensation
Rider 335	Professional Services – Onsite; Physician/Dentist; No Auto
Rider 340	Professional Services – Onsite Physician/Dentist w/ Youth under 21
Rider 345	Professional Services – Onsite Temp Nurses
Rider 350	Professional Services – Cyber – Onsite
Rider 355	Professional Services – Cyber – Offsite
4. The City of New Haven requires the information requested in the <u>Disclosure Affidavit</u> before any City agency, department, or city official seeking agreement/contract shall obtain them, notarized.	
Emailed Disclosures are acceptable.	

Memorandum

Date: 6/29/2022
To: Dr. Tracey, Finance and Operations Committee, and Members of the Board of Education
From: Thomas Lamb, Chief Operating Officer
RE: Facilities Management Services Contract Award to ABM Industries

Introduction

Facilities Management Services to the New Haven Public Schools has been posted for RFP and awarded to ABM Industries by a multi-disciplinary committee consisting of:

NHPS = New Haven Public Schools

CONH = City of New Haven

RFP = Request for Proposal

Thomas Lamb, NHPS COO

Dr. Michael Finely, NHPS Chief of Staff

Dr. Paul Whyte, NHPS Assistant Superintendent for Instruction

Michael Gormany, CONH Budget Director and Acting Controller

Giovani Zinn, CONH City Engineer

Summary of Cost

Proposals that have been submitted and evaluated by this committee are included with this memorandum for your review. We understand that the ABM contract costs are higher but feel that ABM is better able to represent the future needs of the school district as it relates to the improvement of maintenance operations for our schools. A detailed comparison of costs is attached to this document. Some additions to this contract over previous contracts include the addition of a Project Manager that will be specifically utilized for managing the vast number of small and medium sized projects throughout the district. Another addition is a supervisor of Roofs and

Grounds what will be responsible of all items outside of the schools including landscaping, parking lots, snow removal, playgrounds, and roof maintenance. As part of the ABM service the district will have access to a regional manager that will be part of and conduct a quarterly business review that will include the NHPS COO and other member so senior leadership to continually assess and monitor contract performance. Another resource that the district will have access to the ABM Vice President of Engineering and Technical Support that will play an active role in not only setting up the needed resources for ABM to get the account started but provide services to the account for the long term assisting in capital planning and development of a Preventative Maintenance program for our schools.

In summary the contract will be for one year with a total of three renewals that include an 3.9% escalation that is less than the current Consumer Pricing index at 8.3% which is commonly used to measure contract year over year increases in multi-year contracts:

Yr 1	\$1,776,051
Yr 2	\$1,847,093
Yr 3	\$1,920,977
Yr 4	\$1,997,816

Staffing, Resources and Training

In addition to the ABM facilities management team as outlined in the attached table of organization. The school district will have access to our regional manager, Vice President of Engineering and Technical Support and a vast number of other programs that come with a large organization. The selection of permanent AMB staff will be made in concert with and approved by the COO. Some additions to current staffing include a project manager that will coordinate all projects, a supervisor for Grounds and Roofs that will have responsibility for all items outside of all building including playgrounds, landscaping, snow removal and roof repairs. There is also a clearer division between building maintenance services and custodial services that concentrate more on building cleaning. ABM is a data driven organization that

RFP Process

This RFP process has been guided by the City of New Haven purchasing department policies and procedures. The process included posting of the RFP for public response, a building sampling tour, a question period, and an interview and presentation of the RFP respondents' proposals. ABM and

Go2 Solutions were the only two organizations to submit proposals in response to the RFP. Others that had interest but did not continue in the process to submit proposals for one reason or another included JLL, CBRE and OR&L

GO2 Solutions has served the City of New Haven well for many years. The New Haven Public Schools and the City of New Haven now find ourselves needing to move in a direction to address the changing needs of our buildings. A direction with more innovation, process improvement, and plan development. The Education division of ABM provides services that leverage technology; engineering and technical expertise; a vast number of educational clients throughout Connecticut and in the New England region and data driven performance management that the committee believes will better serve the new Haven Public Schools. ABM is an international organization with a regional office located in New York City serving New England.

ABM is committed to providing the New Haven Public Schools a program that will implement the latest Facilities Management industry developments and technologies in a forward-thinking process that brings the vast experience of their client base together with proven programs for building operations.

Transition Team

A transition team will be on site as soon as they are able and will begin transitioning services to a team that is selected by both ABM and the NHPS Leadership. A two-month transition contract is being discussed with Go2 Solutions that will focus on keeping programs running through the summer months. Go2 Solutions staff that meet ABM standards will be welcome to apply into positions and become part of that team in similar roles as they are currently in. Just as with any transition there will be challenges. The committee is confident that the ABM management team is capable of minimizing these challenges and working with NHPS central office and school leadership staff to quickly resolve issues and keep Facilities Services operations moving forward through the summer and be ready for start of the new school year at the end of August. A full transition plan is being created in coordination with ABM and the COO office with deliverables and milestones and will be shared as soon as it is ready.

Thomas Lamb
Chief Operating Officer



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Thomas.Lamb@new-haven.k12.ct.us

A quarterly business review process with ABM regional leadership and NHPS along with the addition of a Facilities Project Manager and a restructuring of the department table of organization will add resources where needed and develop a data driven improvement process that focuses on contract service delivery.

All proposals, presentations and supporting documentation have been included as attachments.



City of New Haven
Bureau of Purchases
200 Orange Street, Room 301
New Haven, CT 06510
Tel: 203-946-8201 Fax: 203-946-8206

Honorable Justin Elicker
Mayor

Michael V. Fumiatti, Sr
Purchasing Agent

The City of New Haven ("City") is accepting sealed
Request for Proposals (RFP) for the following:

Request for Proposal

Project Summary

RFP Title: **Facilities Management Services**

RFP #: **2022-05-1456**

Projection Description: private company to manage and direct its district, facilities management, custodial services, energy management, and environmental health and safety.

Department: **BOE**

RFP/Advertise Date: **May 17, 2022**

Intent to Respond Due Date: **5/23/2022**

RFP Due Date: **5/31/2022**

Opening Time: **11:00** AM

Pre-Proposal Meeting Date: **N/A**

Meeting Time:

Pre-Proposal Meeting Location: **N/A**

Contract Term: **1** year **3** Renewals Option(s) (at the sole discretion of the CONH)

Insurance Requirements: Refer to Rider **300** (This Rider is attached)

Local Preference: **X** **YES** **NO**

Pricing Sheet: **Respondent Supplied**

Responses must be submitted in the form and manner specified in this request.

NEW HAVEN REQUEST FOR PROPOSALS

NEW HAVEN PUBLIC SCHOOLS FACILITIES MANAGEMENT SERVICES

Brief Overview of Project:

The New Haven public schools has engaged the services of a private company to manage and direct its facilities management services. The current contract expires on June 30, 2022. The New Haven Public Schools desires that a private company continue to provide these services and herewith seeks proposals from such firms interested in providing these services.

PROPOSAL REQUIREMENTS

INTRODUCTION

The New Haven Public Schools has engaged the services of a private company to manage and direct its district, facilities management, custodial services, energy management, and environmental health and safety. The current contract expires on June 30, 2022. The New Haven Public Schools desires that a private company continue to provide these services and herewith seeks the Proposals from such firms interested in providing these services.

It is anticipated that the selected Proposer will have a reporting relationship to the New Haven Public Schools through the Chief Operating Officer and the Superintendent of schools or such other designee as shall be appointed. The selected Proposer would serve as a designee of the Chief Operating Officer to perform day to day responsibilities in the management and direction of the existing New Haven Public School employees and all other contracts with private vendors for goods and services. Existing employees would remain employees of the New Haven Public Schools respectively and would be subject to existing collective bargaining agreements. The Public Schools seek the services of a private firm for the development and management of:

1. Facilities Operating and Capital Budgets
2. Skilled Trade Staff
3. Custodial Management and building cleaning programs
4. Building Stewardship and development of the Capital Plan
5. Equipment and Building Life Cycle Reporting
6. Indoor Air Quality Program
7. Green Cleaning Program
8. School Building Use Permit program
9. Building corrective maintenance and CMMS program monitoring
10. Indoor Air Quality Program
11. Building turnover form Construction and Design Team
12. Closing of buildings and preparation to turn building over to City of New Haven
13. Lease space preparation and turn over to landlord at end of lease term
14. District building and equipment preventative maintenance program
15. Energy management and Sustainability program

16. Audio visual services
17. Environmental health and safety including OSHA services
18. Warehouse management
19. Project management including the management of permits with the City of New Haven Building Department.
20. Seeking of grant funding for capital and non-capital projects
21. Agreement and contract management including the creation of requests for proposals, requests for qualifications and bids for service.

It is anticipated that customer satisfaction be improved and the existing level of services currently provided by the incumbent contractor be at a minimum maintained but it is desirous that these services be enhanced and additional cost savings realized and improvement to the level and quality of services provided be obtained over the length of the contract.

SCOPE OF MANAGEMENT SERVICES

FACILITIES MAINTENANCE MANAGEMENT

The New Haven Public Schools is seeking proposals from qualified firms to provide school district with facilities management services:

Such management services would include, but are not limited to, managing the following major program areas:

1. Facilities Operating and Capital Budgets
2. Building corrective maintenance and CMMS program monitoring
3. Planned reduction of deferred maintenance
4. Skilled Trade Staff
5. Building Stewardship and development of the Capital Plan
6. Equipment and Building Life Cycle Reporting
7. Custodial Services Operations program
8. School Building Use Permit program
9. Indoor Air Quality Program
10. Building turnover form Construction and Design Team
11. Closing of buildings and preparation to turn building over to City of New Haven
12. Lease space preparation and turn over to landlord at end of lease term
13. District building and equipment preventative maintenance program
14. Energy management and Sustainability program
15. Audio visual services
16. Environmental health and safety including OSHA services
17. Warehouse management
18. Project management including the management of permits with the City of New Haven Building Department.
19. Seeking of grant funding for capital and non-capital projects
20. Agreement and contract management including the creation of requests for proposals,

requests for qualifications and bids for service.

Continuous improvement in the day-to-day supervision and direction of New Haven Public Schools facility maintenance staff in meeting the short and long-term needs of the district in accomplishing stated goals and objectives. Manage and perform as assigned snow plowing, snow clearing and removal, sanding services. Participate in emergency management planning and response as needed including staffing at the Emergency Operation Center during events and coordinating as needed with Board of Education and City staff in response to all forms of emergencies, weather related issues and unforeseen maintenance, vandalism and all other potential issues that may occur related to buildings, property and infrastructure.

Continuous improvement in the cleaning and building management services to produce clean, healthy learning environments. Development, improvement, and management of summer deep cleaning program that includes:

1. District Floor care program (Floor waxing, stripping, buffing, burnishing etc.)
2. Deep cleaning program related cleaning of all school buildings

Develop, maintain and improve the existing CMMS system of School Dude for work orders, building use permit applications, and project management. Demonstrate staff capacity and familiarity with online work order and inspection systems. Currently in excess of 12,000 preventative maintenance and corrective maintenance work orders are completed annually. Provide to the Chief Operating Officer regular review and inspections reports including photos, of existing conditions and will be further developed and expected to continue.

Develop, maintain and improve a system of quality control to ensure optimal performance and quality of contracted and in-house services. Categorize service requests into identifiable priority areas in order to document and track appropriate levels of response to such categories as life/safety, emergencies, routine repairs, etc. Provide CMMS performance reports at regular intervals as determined by the Chief Operating Officer or designee. The development of key performance indicators will become part of the quarterly review process that measures performance of services provided.

Analyze service and supply contracts as well as warehousing arrangements and make recommendations for improvement and cost savings. Compose RFP and Bid documents. Work with the City of New Haven Purchasing Department to manage On Call contracts.

Develop, maintain and improve a comprehensive preventative maintenance program to ensure optimal life expectancy and operational performance of equipment. Demonstrate the ability to track and report regularly on all preventive maintenance initiatives for all operational equipment and proactively engage in life-cycle and stewardship planning. Building systems shall be maintained to manufacture specifications for frequency and type of preventative maintenance required.

Provide appropriate training and skill development programs to employees to improve their performance, operate in a safe manner and comply with mandated training requirements. Maintain OSHA training requirements including but not limited to blood borne pathogens, slip trip and fall, harness and lift training, lock out tag out training, AHERA management through documented certified OSHA trainer.

Ensure that the New Haven Public School are in full compliance with all local, state and federal laws and requirements. Work with the City of New Haven Building Department, and Fire Marshals Office to insure local codes are adhered to, including but not limited to, preparing or assisting in the preparation of compliance records for state, local and other appropriate agencies as needed.

Administer and comply with all collective bargaining agreements and personnel rules covering the facility maintenance employees and administer a comprehensive human resource program for employees in conjunction with the School's Human Resource offices and legal counsel. Actively participate in collective bargaining negotiations with the trades and custodial unions as requested to support the goals of the New Haven Public Schools.

Develop, maintain and improve upon a real time budget and accounting process through which data reports and regular accountability systems as it pertains to the facility maintenance capital projects, energy and operations are reported to the . Develop and explain annual budget requests in support of defined goals and objectives and in accordance with guidelines issued by the Chief Operating Officer and compliance with Public School legal requirements. Demonstrate experience and capability in MUNIS, EXCEL and similar data systems utilized by the Board of Education and City Finance Departments.

Develop specifications and procure all goods and services necessary to support the facility maintenance and custodial operations in a timely fashion using the Public School's purchasing system and comply with all local ordinances and charter requirements pertaining to purchasing goods and services. All contracts with vendors for goods and services will be between the Public Schools and vendors. The Proposer will be responsible for administering all contracts for goods and services and ensuring compliance with all specifications.

Review and recommend approvals of all vendor invoices for payment and prepare appropriate required paperwork to authorize payments utilizing New Haven Public Schools accounting systems and processes. Process or assist in the process as appropriate for all invoices for payment in accordance with the Public Schools policies and procedures.

Prepare and approve all payroll-processing requirements in accordance with collective bargaining agreements and payroll processing time frames. The Public Schools will maintain existing employees on its own payroll.

Interface and coordinate with other vendors providing long term services to New Haven Board of Education; such as, food services, custodial services, performance contracts, real time energy management services, and school construction program etc.

Develop long-range facility maintenance management plans for all New Haven Public-School buildings both owned and leased including space analysis and program needs; capital improvement and investment needs; and maintenance and upkeep.

Identify capital projects for incorporation into the New Haven Public School district Capital Plan. Communicate capital project needs to the BOE and coordinate facility management and custodial management duties as necessary to assist in the completion and long-term maintenance of all capital projects.

Provide project management for minor capital projects and non-School Construction Program projects such as carpet and floor covering replacement, painting, accreditation projects and minor interior modifications for the replacement of mechanical, electrical, plumbing building systems or components. This will include development or obtaining bid specifications as needed and overseeing contractor performance and project completion. Oversee and coordinate office reallocations and moves. Perform management of Grant related projects.

Maintain a twenty-four hours a day, seven days a week **DESIGNATED DUTY OFFICER TYPE SYSTEM** and an appropriate communications system to enable constant and rapid communications to all appropriate levels of maintenance required including emergency response and coordination of required support at all times.

Develop, maintain and improve fixed asset inventory for all equipment and furniture in accordance with the New Haven Public School's district requirements, policies and procedures. Provide appropriate inventory and security controls over all inventory and warehoused equipment. Provide life cycle replacement program for custodial equipment and BOE vehicles.

Advise in the planning, contracting, construction build out, and furnishing of all leased properties.

Training and proactive analysis of Workman's Compensation claims, as well as training, and prevention of job-related injuries that result in Workman's Compensation claims.

Proactive data collection and analysis of Facilities related functions so as to prepare regular timely reports and analysis of operations as requested by the Chief Operating Officer including weekly status meeting and a quarterly review of contract deliverables and review of agreed upon contract Key Performance Metrics (KPI's).

Attend Finance and Operation meetings, Board of Education meetings and all other applicable Board, City or other Community meetings as directed by the Chief Operating Officer, Superintendent or other designee.

ENERGY MANAGEMENT

Develop, maintain, and improve upon a plan for the New Haven public school district to examine and identify opportunities for energy and utility, conservation, work method improvements and contracting methods. Participate in Energy Star Portfolio Management Program.

Provide regular energy and utility reports by school/building isolating cost, demand and usage. Review monthly utility bills and consumption in order to track and identify trends and anomalies and remedy as necessary.

Demonstrate staff experience and ability to work with utilities, the City Energy Committee and other available partners to strategically apply for and maximize incentives and reimbursements where appropriate.

Develop, maintain and improve energy cost avoidance measures, life-cycle and stewardship planning on a 24/7 basis. Troubleshoot make improvements and upgrades to the Building Management System (BMS). Manage centralized HVAC controls and settings and local controls and online or remote controls in a cost effective and proactive manner designed to run all buildings as

cost effectively and efficiently as possible while maintaining comfort for all users consistent with building design and expectations.

Develop, maintain, and improve upon retro-commissioning efforts of buildings and systems, audits of building and systems and turn-over of building and systems from construction projects and other capital projects to insure completion of projects, proper usage, maintenance and strategic upgrades and replacement of equipment in order to leverage maximum cost effectiveness and energy efficiency in school buildings and properties while also maintaining acceptable levels of comfort and usability.

Explore emerging technologies, grants, projects and practices which can be utilized to expand or supplement past and current projects such as the LED replacement project, the boiler replacement project, Co-Gen, solar, fuel cell and other alternative energy or cost positive programs.

CUSTODIAL GROUNDS, VEHICLES, WAREHOUSING, MANAGEMENT SERVICES

Provide (3) Full Time Building Manager or lead day supervisor positions and (3) Full time Assistant Building Manager or lead evening supervisor positions and Hill Regional Career, Wilbur Cross and Hillhouse.

The maintenance at these three schools will be based on the observance of New Haven public school holiday calendar as observed each year.

The New Haven Public Schools at its sole discretion will determine when and how these positions will be used. The New Haven Public Schools intends to utilize the work hours to cover building use permits and events which may take place on weekends, nights or off hours thus providing full coverage of these buildings to need.

Maintenance of Schools Grounds, Vehicle, and Warehousing Services shall generally consist of but not be limited to the following:

- Prepare and administer the overall budget for the said service. (Currently in excess of \$26,000,000).
- Manage the purchases of custodial supplies and equipment
- Manage the maintenance and repair of the entire BOE fleet of vehicles.
- Manage the Capital Purchases of BOE vehicles.
- Training of all, Custodial, Warehousing and Fleet Maintenance staff in job specific training as well as OSHA, Federal, State of CT and other regulations required for satisfactory performance of duties.
- Manage all outsourced contracts as it related to Custodial, Ground or Fleet Maintenance.
- Manage Warehouse staff including inventory control, security of assets and distribution control.
- Manage Custodial staff of BOE employees (Custodial 102 FTE) (166 PTE) and other staff that may be included from time to time in the Custodial function.
- Manage and coordinate all BOE swimming pools and compliance including staffing, training, chemical purchase and use, repair of mechanical systems, etc.
- Maintain the existing real time budget tracking system including all records, reports, overtime budgets etc. Constantly track actual vs. budgeted expenses. Experience in MUNIS, Excel, Word and related systems is required.
- Work closely with other City Departments including, but not limited to DPW, City Engineering, Department of Health, Food Service, Security, Purchasing, Human Resources, City Economic Development Administration to monitor and maintain environmental and IAQ standards at all school facilities.

- Prepare specifications and analyze bids received for all outsourced services such as grounds landscaping, snow removal with an emphasis on local MBE, WBE Small Contractor Development Program.
- Manage both in house employees and outsourced contractors as it relates to grounds maintenance and snow removal and emergency response.
- Provide home office technical support to assigned personnel where appropriate.
- Review, improve and enhance the current Standards Operational Procedures/User Manual.
- Establish a quality Control Process that is satisfactory to the BOE. QC reports will be issued monthly with a quarterly review and annual report as well.
- Training and proactive analysis of Workman's Compensation claims, as well as, training and prevention of job related injuries that result in Workman's Compensation claims.
- Proactive data collection and analysis of Custodial related function so as to prepare timely analysis and reports as requested by the Chief Operating Officer.
- Management and supervision of Warehouse related activities including maintenance of a materials and inventory control system, handling of receipt and disbursement of materials etc.
- Management and oversight of the BOE building use permit system and related audio visual equipment (lights and sound) and make recommended improvements.
- Manage unfunded State of Connecticut mandates, AED program, AHERA program, Integrated Pest Management Plan, IAQ program, Green Cleaning, Security related support via management and completion of the work orders from the Director of Security or designate.
- Responsible for installation, maintenance and repair of locks and lock systems at and within all Board of Education buildings and facilities. Responsible for cutting keys and assisting in issuance of keys.
- Responsible for identifying materials needed for the operation and provides assistance during bid procedures and to outside vendors as needed be on call for all after hour repairs.

PROVISION OF ADDITIONAL SERVICES

It is understood that firms responding to this RFP may have capacities to provide additional services to the Public Schools above those required in Section 1. It is the intent of the Public Schools to clearly understand what services will be provided by responding firms above and beyond what is requested in Section 1. Responses should detail these additional services into two categories as described in the proposal submission instructions: those services that would be provided as part of the base fee and those services that would be provided at an additional cost to the Public Schools.

TERM & RENEWAL OPTION

The intent of the Public Schools is to enter into an agreement for an initial one-year period, which would include a mutually agreeable renewal option for annual renewals up to four (4) options.

PERFORMANCE REVIEW AND GOALS

As part of the proposal award, the New Haven Public Schools shall utilize performance measurement factors to be used to evaluate the awarded Proposer's performance over the contract period. These factors will measure customer (tenant and users) satisfaction, operational performance and cost effectiveness. These factors will be benchmarked for existing performance prior to the selected contractor engagement and will be measured semi-annually throughout the contract. The selected Proposer will be evaluated based upon achieving the following goals:

- To strengthen and enhance the current maintenance and custodial operation.
- To reinforce and improve employee skill levels.
- To continuously upgrade and improve appropriate management support systems.
- To maintain and improve current energy management efforts and cost savings.

- To identify deferred maintenance and modernization and develop a systematic life-cycle and stewardship plan to resolve these problems.
- To improve the current customer satisfaction and relationships.
- To improve the current the cost effectiveness of the maintenance operations resulting in hitting all budget targets or achieving budget savings.
- To preserve the capital assets of the Public Schools with a particular emphasis on buildings renovated or constructed through the School Construction Program.
- To enhance the image and reputation of the New Haven Public Schools as a professional well-run organization.

REPORTS

The selected Proposer shall produce, at a minimum, reports containing the following information:

An annual detailed work plan towards achieving the goals outlined in the RFP; semi-annual detailed updates of progress and achievements in accomplishing the work plan; and monthly work plan updates.

Semi-annual reports on customer satisfaction and performance measurement indicators as agreed upon in the contract award and a work plan to improve those indicators during the ensuing six months.

Timely, rapid and detailed reports and analysis of all facilities, custodial, grounds and warehouse related activities in a format as requested by the Chief Operating Officer which is currently accomplished through weekly meeting and data review.

COMPENSATION

The Public Schools intend to award a contract that reimburses the contractor a lump sum amount payable in equal monthly installments. This lump sum amount will be fixed for the first year of the contract based upon the response to the RFP. Proposers should include a proposed fee structure for each of the four (4) potential renewal options. Such structure should be based on factors such as increases in the Consumer Price Index (CPI), scope adjustments and available budget.

TERMINATION

Following the award from this request for proposals, should the New Haven Public Schools find that the proposer has failed in any material respect to perform its obligations under this agreement; the Public Schools may cancel this agreement. The Public Schools shall notify the Proposer in writing of its failures and permit the Proposer to correct its failures within thirty (30) days. If after the thirty (30) day period the Proposer fails to correct its failures to the satisfaction of the Public Schools, the agreement will be canceled effective thirty (30) days. The Proposer will be expected to continue to perform the requirements of the RFP and contract during that thirty-day period. The proposer shall be liable for damages from such breach including reasonably foreseeable incidental and consequential damages. Any compensation due the Proposer will be paid only in accordance with the compensation section of this RFP.

KEY PERSONNEL

The selected Proposer will be required to specifically identify the key personnel that will staff this project and utilize such key personnel identified in the proposal and subsequently approved by the Public Schools to perform the stated functions. In the event that the personnel named in the proposal are unable to perform due to death, illness or resignation from the employment, the Public School's request for removal or similar reasons, the Proposer will promptly submit the names and qualifications of proposed suitable replacements. No substitution of key personnel will be allowed without the prior approval of the Public Schools. Once a contract is in place, advanced notification of any proposed staff changes will be required. Approved substitution will be made at no increase in proposed fee.

TAXES

New Haven Board of Education are a qualified tax-exempt institution and as such is not liable for any federal, state, or local excise, sales, use, property or other taxes that Proposer may incur as a result of this agreement. The successful Proposer will be obligated to pay property taxes to the City Of New Haven with respect to any of the Proposer's taxable personal property, motor vehicles or real estate within New Haven which may be used in conjunction with the performance of this agreement.

INDEMNIFICATION

The successful Proposer shall release defend, indemnify and hold harmless the City of New Haven and the New Haven Board of Education, their respective boards and commissions, officers, officials, employees, agents, representatives, and servants from any and all suits, claims, losses, damages, costs (including, without limitation, reasonable attorneys' fees), compensation, penalties, fines, liabilities or judgments of any name or nature for injuries or alleged injuries to person (including sickness and death) or to property, or financial losses, sustained or alleged to have been sustained by any person or concern, including officers, agents, servants, employees, contractors and subcontractors of the City and New Haven Public School or the successful Proposer arising or alleged to have arisen out of the negligent, grossly negligent, reckless or intentional performance or failure to perform any part of this agreement by the Proposer or by anyone acting under the supervision of the Proposer. This indemnity shall not be affected by other portions of this agreement relating to insurance requirements.

The successful Proposer shall release, defend, indemnify and hold harmless the City of New Haven and the New Haven Board of Education, New Haven Public Schools and their respective boards and commissions, officials, officers, employees, agents, representatives, and servants from any and all suits, claims, losses, damages, costs (including, without limitation, reasonable attorneys' fees), compensation, penalties, fines, liabilities or judgments that may arise out of the failure of the successful Proposer, its officers, agents, employees, contractors, subcontractors, or anyone directly or indirectly employed by them to comply with any laws, statutes, ordinances, codes, and rules and regulations or the United States of America, the State of Connecticut, the City of New Haven, or their respective agencies. This indemnity shall not be affected by other portions of the agreement relating to insurance requirements.

COMPLIANCE WITH LAWS

Proposer shall operate and maintain all properties and perform all of the services required in the RFP in full compliance with all appropriate federal, state and local laws and regulations.

NON-DISCRIMINATION

The Proposer in performing under this agreement shall not discriminate against any workers, employee or applicant or any member of the public because of race, creed, color, religion, age, sex, marital status, national origin, mental retardation or physical disability, including but not limited to blindness, unless it is shown by Proposer that such

disability prevents performance of the work involved, in any manner prohibited by the laws of the United States or the State of Connecticut, nor otherwise commit an unfair employment practice. Proposer will take affirmative action to insure that applicants are employed and that employees are treated during employment without regard to their race, creed, color, religion, age, sex, marital status, national origin mental retardation or physical disability, including but not limited to blindness, unless it is shown by Proposer that such disability prevents performance of the work involved, in any manner prohibited by the laws of the United States or the State of Connecticut, nor otherwise commit an unfair employment practice. Proposer agrees that this non-discrimination clause will be incorporated in all contracts entered into by it with suppliers of services or materials, contractors and sub-contractors and all labor organizations furnishing skilled, unskilled and craft unions skilled labor or whom may perform any such labor or services in connection with this agreement.

CONTRACT FOR SERVICES

The New Haven Board of Education and Proposer expressly agree that this is an agreement for the provision of the specific services herein described; that Proposer is to perform those services for the term set forth herein and pursuant to the provisions of this agreement; that the Proposer(s) are independent contractors, not employees of the New Haven Board of Education, for these purposes and as such neither they nor their employees are entitled to any Public Schools employment benefits, including without limitation, life and health insurance, vacation and sick leave, pension rights or workers compensation.

PUBLIC INFORMATION & OWNERSHIP OF DOCUMENTS

All proposals submitted and information included therein or attached thereto shall become public records upon their delivery to the New Haven Board of Education. All documents created by the Proposer during the completion of their contract requirements shall become the property of the Public Schools, including any databases and information systems that are created.

EXAMINATION OF DOCUMENTS

Proposers shall thoroughly examine and be familiar with these proposal documents. The failure or omission of any Proposer to examine these documents shall in no way relieve any Proposer of obligations with respect to this Request for Proposals. The submission of a proposal shall be taken as prima facie evidence of compliance with this paragraph. The response and the Request for Proposals shall become part of any agreement by reference.

SELECTION PROCESS AND EVALUATION CRITERIA

After receipt of proposals, the Public Schools will use the following criteria in evaluating the proposals and selecting a provider of services:

WeightCriteria

- 10 points: Responsiveness to the RFP and substantiation of representations regarding the provider's capabilities and professional competence to accomplish the required services.

- 10 points: References of current clients of similar size and scope being provided with comprehensive facilities management and custodial management services as described in this RFP.

- 10 points: Proposed concepts for improvements and additional service, which will enhance the current operations.

- 10 points: Previous experience with a school system of equal or larger size as measured by square footage, number of School buildings, number of students, staff as well as overall budget.

- 20 points: Qualifications and experience of Key personnel to be assigned to the specific service areas for this contract as described in the RFP.

- 20 points: Confidence in the capacity of each firm to provide a comprehensive state of the art data driven facility, energy management and custodial management strategy and the firm's understanding of what is needed to deliver such a strategy for New Haven taking into account all of its buildings, facilities, systems and foundational elements.

- 20 points: Costs: Upon receipt of the proposals, a Selection Committee will review the proposals relative to the RFP requirements and evaluation criteria described in this section. Higher rated proposal(s) will be invited to make an oral presentation to the Selection Committee to explain their proposal and answer questions. At the conclusion of such discussions, the Public Schools may enter into negotiations with the Proposer deemed professionally qualified and whose proposed services are deemed most meritorious.

100 Total maximum score

PROPOSAL SUBMISSION INSTRUCTIONS

Submissions should include information in the sequence requested below. Each submission shall include tabbed sections with the letters indicated below which shall be limited to the information described in each section. Other information may be included in the submission but not included within the tabbed sections. Proposers shall submit one- (1) original and (3) three copies of their proposal.

Proposer's name addresses and telephone number.

A detailed description of how the Proposer would meet the requirements of the scope of management services section. In addition, each proposal shall include a description of any other services the proposer would provide as part of the lump sum fee for basic management services.

A statement of the lump sum fee for the management services described herein submitted in the format requested by the Public Schools and included in this request for proposals for the first one-year of a contract. (RFP Submission Form)

Each proposal shall include a description of the positions the Proposer will supply with the names of key personnel; the responsibilities of each of the positions; and the role each position will perform in interfacing with Public School personnel, tenants and customers in performing the basic management services. A description of all applicable qualifications, certifications and education of personnel shall be provided or available to meet the management services requirements shall also be provided. An organizational chart shall be provided.

Other auxiliary services offered by the proposer at a fee in addition to the lump sum fee for the basic services shall also be described in the proposal. Such description shall include the services offered and the respective fees for each service.

A description of appropriate performance measures should be included in the proposal that would allow the Public Schools to measure the Proposer's performance with regard to customer satisfaction and cost effectiveness in accordance with Section 5 of the RFP.

Five (5) references shall be provided in the proposal. Each reference shall be provided with a description of the relationship and name and telephone number of the key contact. References of clients with experiences similar to the services requested in the RFP will be judged more relevant in the evaluation.

Each proposal shall identify any additional resources, if any, the Public Schools would have to make available under the proposal including equipment, office space, furniture, etc.

Facilities Maintenance and Custodial Management Exhibits

Exhibit A: Collective Bargaining Agreements for Locals 287, 3144, and Trades

Exhibit B: 2022 / 2023 School Calendar

Exhibit C: Fiscal Year 2021 / 2022 Custodial and Operations of Plant general fund budget

Exhibit D: Capital Budget

Exhibit E: New Haven School District Building Inventory and Square Footage

Exhibit F: Maintenance and Trade Union Job Classifications

Exhibit G: Custodial and Office Staff Job Classifications

Exhibit G

Building Manager: Reports to the District Custodial Supervisor. Works in conjunction with the District Custodial Supervisor to assist in supervision of the Assistant Building Managers and contracted part-time Custodial Staff to insure a clean and safe building. (Local 287 Union)

Assistant Building Manager: This position is a manual semi-skilled worker in the care, custody, cleaning, maintenance and minor repair of New Haven Public Schools school buildings, grounds, facilities and equipment. (Local 287 Union)

Custodial Engineer: Responsible for replacement of HVAC Air Filters in all New Haven Public School building. Conducts inspections of building systems, Fire Extinguishers, exit lighting, eye wash stations and Fume Hoods throughout the School District. (Local 287 Union)

Warehouse Staff: This staff is responsible for the maintaining of the warehouse inventory to include but not limited to receiving and distribution of all custodial and school supplies. (Local 287 Union)

Accountant IV This staff is responsible for engaging in fiscal oversight and data entry related to contracts, purchase orders, payroll, capital and maintenance expenses and support compliance with City Fiscal Systems and protocols while service as a liaison with the Chief Operating Officer and Budget Offices of the City and Board of Education. (3144 Union).

***The Board reserves the right to modify the titles and duties and to expand or contract the number of employees based on the needs of the Board and applicable collective bargaining agreement provisions.**