



802 Port America Place, Suite 100, Grapevine, TX 76051

817-481-6464

8/15/2013

Dr. James Monaco
Aubrey ISD
415 Tisdell
Aubrey, TX 76227
(940) 668-0060

Re: RFP Bid Requirements

Dr. Monaco,

Please accept this proposal for Integrated Facility Reporting & Support Services provided by Efficient Facilities International for Aubrey ISD. EFI will guarantee that all cost figures will be firm for at least (60) calendar days after the opening date of the proposals for custodial services.

Company Profile:

Efficient Facilities International (EFI) was incorporated in the State of Texas in 2001. Since this time we have grown to 150 employees and support an equal number of client employees and external partners and strive to deliver highly reliable facilities and quality driven services. We execute all manner of facility services with our core offering being general maintenance, skilled maintenance, janitorial, landscape, HVAC, plumbing, electrical, lighting, construction services, energy consulting, budget analysis, reserve analysis, and inventory management. We currently maintain in excess of twelve million square feet daily and have over 300 clients. We provide facility services to school districts, private schools, churches, class (A) office space, industrial space, distribution space, property owners, and property management firms.

Qualifications:

- 1) Over the last (12) twelve years EFI has and will continue to dedicate significant resources to refine our infrastructure so that we may best support our client's operational objectives. As a smaller company we were selected by Grapevine-Colleyville ISD to deliver in excess of one million square feet per night of building support services. We are proud that we were able meet our contract obligations and simultaneously improve our company in the process. Included in the proposal documents is a list of clients that we have provided integrated support services to over the past 5 years.

- 2) We successfully delivered services over the last (5) years to the clients listed on the reference sheet and those included in the master proposal documents.
- 3) EFI received non-renewals from Grapevine-Colleyville ISD and Blue Ridge ISD following four years of successful facility support delivery at which time changes in educational finance laws allowed the district the financial flexibility to bring all services in house.
- 4) Secretary of State Certificate – Included in proposal documents
- 5) Certificate of liability insurance – Included in proposal documents

Staffing Plan & Policies:

- 1) EFI has built a substantial technology backbone to support our daily operation. These tools include web based access for all clients and employees that support business necessities. All work orders can be submitted, tracked in real time, and categorized into specific trades including general maintenance, safety compliance, HVAC maintenance, plumbing services, electrical, lighting, janitorial, grounds, etc. All HVAC preventative maintenance and general maintenance repair reports are viewable online, post inspection. Furthermore, all forms of maintenance requests can be submitted via our smart phone based work tracking system.
- 2) General Maintenance Management is handled through FLEX accounts which are included in the proposal documents. All facility operations reporting will be submitted and tracked on the web based dashboard. EFI will document and categorize all building assets with parts inventoried to maximize wrench time and procurement. Full reports covering the comprehensive documentation of all facility support work will be delivered every two months to district administration. These reports will reflect the current status of all facility service, work completed, productivity associated, recommendations and next steps for continuous improvement.

Energy Management – EFI will monitor utilities as part of a comprehensive energy management program. All assets consuming utilities will be monitored and recommendations for best practice provided on a regular basis.

Reserve Analysis – EFI will conduct a reserve analysis to capture real-time data on HVAC-R and other mechanical assets, roof systems, drainage systems, building façade, and major building systems including condition and projections related to lifespan for each. Performance updates and future replacement considerations including timelines required for creation of proper facilities budgets will be provided. Additionally, it is through the comprehensive reserve analysis that long-term planning may be better executed by district administration. Finally, the reserve analysis will be merged with the district energy management plan to look for continuous savings in this area.

Deferred Maintenance – EFI will use a proactive system of gathering all maintenance needs for all campuses that will be prioritized and fed into the work order system. This model is proactive and will help EFI take current maintenance production from typical ranges of 15% to 25% wrench time to our “best practice” objective of 60%

wrench time for all campuses and all services. All maintenance is planned and placed on an online viewable work schedule, including projects. District maintenance personnel will be supported in ways that will lead to the achievement of desired and sustainable wrench times. This includes comprehensive inventory management so that such things as procurement time can be eliminated.

In the event of an emergency, the online systems can be utilized to instantaneously page all EFI internal management and service personnel ensuring immediate response time 24 hours a day.

- 3) Recurring Building Inspections – All city & state compliance items/systems will be set on schedules and managed by EFI by utilizing the EFI online work order system. Inspections include, but not limited to: fire systems, fire extinguishers, wet systems, fire safety inspections, roof inspections, bleacher inspections, playground inspections, backflow preventers, pest control, and all other local, state, or federal facility or building related inspections required by an educational institution of AISD scale. Tickets will auto generate several weeks in advance to allow ample time for coordination and scheduling.
- 4) Every (60) days, EFI will provide detailed reporting to the district regarding the status of all completed work, work in progress, work by others, projects, and updates regarding building systems and district asset's required for planning purposes.
- 5) Bios for key corporate employees – Included in proposal documents.

Operations Plan & Policies:

- 1-8)
 - EFI management will schedule frequent trips to the district to inspect quality of service. Any service problems or failures will be directly handled by the EFI support team for all service. This ongoing benchmarking will be completed in timely manner
 - The web/internet based reporting software for request submittals; work tracking and reporting can be used by EFI employees and district personnel. This includes, but is not limited to monthly performance reports, verifying completion of daily, weekly, and monthly maintenance tasks or project work
 - Toll free phone based employee clock in for accurate mapping of contracted labor to actual hours worked, including client reports depicting punch in and out times for all employees
 - Monthly and annual schedules of work will be delivered to district administration
 - Online documentation of safety and compliance training for all employees available in report fashion for our clients
 - Quality assurance tools that record deficiencies, initiates and tracks training, and documents the correction thereof
 - Supply ordering and consumption reports necessary to track and control spend
 - Back end accounting features for purchase and release orders to efficiently control the cost of service delivery

- Asset and equipment tracking including online schedules and the documentation of regular maintenance for all emission producing equipment, e.g. propane burnishers
- Project scheduling tools for time-bound work such as summer floor care and gym refinishing
- EFI will train all personnel to handle any type of emergency requirements in ordinance with OSHA and will take direct action utilizing all staffing resources
- Training plans and procedures that will occur at the district are included in the training manual provided to each employee.
- EFI will ensure that all security policies are in compliance with the policies already in place at Aubrey ISD. This includes a comprehensive review of building security and lockdown procedures. All EFI employees are submitted to a federal background check and screening prior to being placed at a client location.
- EFI staff will carry a photo badge with their name and corporate contact information displayed prominently. All EFI staff will follow district policy regarding check in/check out requirements for all campuses.

Pricing: Please see summary sheets and schedules for pricing regarding the proposal for integrated facility reporting and support services to be delivered to Aubrey ISD

Aubrey ISD

R3 - Integrated Facility Reporting, On Demand Plant Maintenance, HVAC Systems Maintenance & Reporting, & Building Systems Compliance - Investment Summary

	Position / Service	Hours / Week	Investment / Week	Investment / Month	Investment / Year	
BUILDING MAINTENANCE	Janitorial Services Reporting	4.00	\$56.68	\$245.60	\$2,947.20	
	FLEX Maintenance Account (FMA)	16.00	\$663.85	\$2,876.67	\$34,520.04	
	FLEX Parts Account (FPA)	2.00	\$692.31	\$3,000.00	\$36,000.00	
	Facility Maintenance - Skilled & Routine	0.00	\$0.00	\$0.00	FLEX	
	Exterior Lighting - Wall Pack & Parking	0.00	\$0.00	\$0.00	FLEX	
	Interior Lighting - Bulb & Ballast	0.00	\$0.00	\$0.00	FLEX	
	Plumbing Maintenance Services	0.00	\$0.00	\$0.00	FLEX	
	Electrical Maintenance Services	0.00	\$0.00	\$0.00	FLEX	
	Parking Lot Striping Services	0.00	\$0.00	\$0.00	FLEX	
	Grounds Services Reporting	2.00	\$12.07	\$52.30	\$627.60	
	Grounds Services Irrigation Reporting	0.15	\$6.03	\$26.15	\$313.80	
	Grounds Services Irrigation Repairs	0.00	\$0.00	\$0.00	FLEX	
	Grounds Services Athletic Fields Prep	0.00	\$0.00	\$0.00	FLEX	
	Grounds Services - Soil Quality Report	0.15	\$6.73	\$29.15	\$349.80	
	Grounds Services - Athletic Field Top Dress	0.00	\$0.00	\$0.00	FLEX	
	Grounds Services - Portal Management	0.08	\$2.79	\$12.08	\$144.96	
	HVAC Preventative Maintenance (PM)	9.60	\$760.94	\$3,297.42	\$39,569.04	
	HVAC Repair Services	0.00	\$0.00	\$0.00	FLEX	
	INSPECTIONS	Pest Control - Quarterly	0.90	\$86.65	\$375.50	\$4,506.00
		Pest Control - Rodents	0.40	\$29.07	\$125.95	\$1,511.40
Annual Elevator Certification		0.05	\$5.77	\$25.00	\$300.00	
Annual Chair Lift Inspection		0.15	\$0.00	\$0.00	FLEX	
Elevator Lift System Repairs		0.15	\$0.00	\$0.00	FLEX	
Fire Safety Inspection - Annual		0.10	\$4.04	\$17.50	\$210.00	
Fire Inspection - (6) Fire Alarm Panel		0.90	\$62.31	\$270.00	\$3,240.00	
Fire Inspection - (4) Wet Systems		0.50	\$32.31	\$140.00	\$1,680.00	
Fire Inspection & Tag - (110) Extinguishers		0.15	\$9.92	\$43.00	\$516.00	
Fire Inspection 6 Year - (110) Extinguishers		0.20	\$13.27	\$57.50	\$690.00	
Fire Inspection Hydro - (110) Extinguishers		0.00	\$0.00	\$0.00	FLEX	
Hot Water Heaters - Pressure Test		0.00	\$0.00	\$0.00	FLEX	
Backflow Inspection - (12) Preventers		0.15	\$68.08	\$295.00	\$3,540.00	
Rain & Freeze Sensor Inspection		0.00	\$0.00	\$0.00	FLEX	
Kitchen Suppression Inspection - (4)		1.25	\$25.07	\$108.64	\$1,303.68	
Kitchen Hood Vent Cleaning - (2)		1.25	\$40.34	\$174.80	\$2,097.60	
Class K Extinguisher Hydro-Test & Refill - (4)		0.60	\$0.00	\$60.00	\$720.00	
Bleacher Inspection - Annual		0.50	\$0.00	\$166.67	\$2,000.00	
Playground Inspection - Annual		0.35	\$0.00	\$154.17	\$1,850.00	
Biennial Gas Survey		0.42	\$0.00	\$115.00	\$1,380.00	
Thermographic Survey	0.00	\$0.00	\$0.00	FLEX		
Roof Inspections & Log	0.30	\$18.20	\$78.85	\$946.20		
MGM	IT & Network Support	0.00	\$0.00	\$0.00	PRJ	
	Quality Assurance Reporting	2.00	\$28.46	\$123.32	\$1,479.84	
	Parts Procurement, Inventory MGMT, & Delivery	4.00	\$75.00	\$325.00	\$3,900.00	
	Administrative Support	2.00	\$6.80	\$29.48	\$353.76	
	Reporting, Software, & Portal Management	4.00	\$67.52	\$292.58	\$3,510.96	
Totals By Category		54.30	\$2,774.19	\$12,517.32	\$150,207.89	

FLEX Account labor & materials are bankable with all non utilized hours and material costs refunded.



EFI - Labor & Rental Prices

Effective: 1/1/2013

<u>Bill Rate</u>	<u>Rate Description</u>
\$ 15.10	Basic Janitorial
\$ 18.00	General Labor
\$ 28.00	Floor Maintenance
\$ 30.00	Special Projects
\$ 28.00	Landscape Skilled
\$ 35.00	General Maintenance (Bulbs only)
\$ 40.00	Construction Services
\$ 45.00	Skilled Maintenance (Plumbing, Electrical or Ballasts)
\$ 60.00	Management Services
\$ 85.00	HVAC Service (Licensed)
\$ 85.00	Electrical Service (Licensed)
\$ 90.00	Plumbing Service (Licensed)
\$ 90.00	Fire Panel & Suppression Service (Licensed)
\$ 100.00	Networking Service
\$ 128.50	Back Flow Repair
\$ 155.00	Elevator - Licensed

Lift Rental Prices

19' Scissor Lift (25' WH)	\$125.00 + \$60.00 Delivery/Pickup fee = \$185.00
20' Mast Lift (26' WH)	\$125.00 + \$60.00 Delivery/Pickup fee = \$185.00
26' Platform Lift (Bigfoot - 32' WH)	\$150.00 + \$60.00 Delivery/Pickup fee = \$210.00
34' Man lift (Basket Lift - 40' WH)	\$110.00 + \$60.00 Delivery/Pickup fee = \$170.00
36' Basket Lift (Single Man - 42' WH)	\$150.00 + \$60.00 Delivery/Pickup fee = \$210.00
40' Z Lift Articulating Lift (46' WH)	\$245.00 + \$80.00 Delivery/Pickup fee = \$325.00
Small Bucket Truck (38' Platform)	\$60.00 Per (4) hours + \$10.00 Per Hour Fuel Fee
Large Bucket Truck (65' Platform)	\$120.00 Per (4) hours + \$10.00 Per Hour Fuel Fee

Contracted client rates are listed above, please check with EFI Sales to verify all pricing 817-488-2720.
 Liability waiver required for all lift rentals.

Aubrey ISD - HVAC MI and PM Investment Summary

ASSET & LABOR SUMMARY														
Unit Quantity	Service Per Year	Service Type	Service Description	Make	Unit	Model Number	Serial Number	Unit Size TON	Filter Size	Labor Per Unit	Total Hours	Hourly Rate	Investment Annual	Investment Per Month
198	3	Quarterly Maintenance	Inspect, Adjustment & Filter Change	TBD	WSHP	TBD	TBD	TBD	TBD	0.35	207.90	\$85.00	\$17,671.50	\$1,472.63
198	1	Annual Service	Inspection, Filter, & Coil Clean (ANNUAL SER)	TBD	WSHP	TBD	TBD	TBD	TBD	0.75	148.50	\$85.00	\$12,622.50	\$1,051.88
38	3	Quarterly Maintenance	Inspect, Adjustment & Filter Change	TBD	Split Systems	TBD	TBD	TBD	TBD	0.35	39.90	\$85.00	\$3,391.50	\$282.63
38	1	Annual Service	Inspection, Filter, & Coil Clean (ANNUAL SER)	TBD	Split Systems	TBD	TBD	TBD	TBD	0.75	28.50	\$85.00	\$2,422.50	\$201.88
35	3	Quarterly Maintenance	Inspect, Adjustment & Filter Change	TBD	RTU	TBD	TBD	TBD	TBD	0.35	36.75	\$85.00	\$3,123.75	\$260.31
35	1	Annual Service	Inspection, Filter, & Coil Clean (ANNUAL SER)	TBD	RTU	TBD	TBD	TBD	TBD	0.75	26.25	\$85.00	\$2,231.25	\$185.94
2	3	Quarterly Maintenance	Inspect, Adjustment & Filter Change	TBD	Boiler	TBD	TBD	TBD	TBD	0.35	2.10	\$85.00	\$178.50	\$14.88
2	1	Annual Service	Inspection, Filter, & Coil Clean (ANNUAL SER)	TBD	Boiler	TBD	TBD	TBD	TBD	0.75	1.50	\$85.00	\$127.50	\$10.63
0	3	Quarterly Maintenance	Inspect, Adjustment & Filter Change	TBD	Chiller	TBD	TBD	TBD	TBD	0.35	0.00	\$85.00	\$0.00	\$0.00
0	1	Annual Service	Inspection, Filter, & Coil Clean (ANNUAL SER)	TBD	Chiller	TBD	TBD	TBD	TBD	0.75	0.00	\$85.00	\$0.00	\$0.00

ASSET & LABOR SUMMARY														
Unit Quantity	Service Per Year	Service Type	Service Description	Make	RTU NO.	Model Number	Serial Number	Unit Size TON	Filter Size	Labor Per Unit	Total Hours	Hourly Rate	Investment Annual	Investment Per Month
											491.40			\$3,480.75

FILTER SUMMARY												
Unit Count	Filter / Unit	Service Type	Service Description	Make	Model Number	Unit Size (TON)	Filter Size	Filter Cost	Change Cycle (Annually)	Annual Filter Count	Annual Filter Investment	Investment Per Month
1	0	Filter Change	Replacement Filters - Pleated - High Efficiency	Glasgoss		N/A	20x25x2	\$0.00	4	0.00	\$0.00	\$0.00
										0.00		\$0.00
										0.00		\$0.00

BELT SUMMARY												
Unit Count	Belt / Unit	Service Type	Service Description	Make	Model Number	Unit Size (TON)	Belt Size	Belt Cost	Change Cycle (Annually)	Annual Belt Count	Annual Belt Investment	Investment Per Month
0	0	Belt Change	Replacement Belts - Heavy Duty V-Belt	Dayco	N/A	Variable	TBD	\$13.25	1	0.00	\$0.00	\$0.00
										0.00		\$0.00
										0.00		\$0.00

Annual Procurement & Fuel \$200.00

TOTAL MONTHLY INVESTMENT \$3,497.42

TOTAL ANNUAL INVESTMENT \$41,968.96

Note: Filter cost range from \$3.36 - \$8.50 for this project. Pricing above is based upon the cost of pleated filters and the determined quantity per unit. Fiberglass filters are inexpensive, but are completely ineffective. EFI does not use fiberglass or fiberspun filters. Pleated filters are used for all EFI PM programs.



Key Corporate Personnel

Steven Wills

Efficient Facilities International, Inc., Present

- Co-founder and SVP Business Development
- Responsible for account acquisition and managing Sales organization

Hitachi Consulting (Formerly Experio Solutions), 2001 – 2002

- Director of Business Development for West Region
- Responsible for Oil and Gas vertical
- Liaison between Service Delivery and client base
- Partnered with Regional Vice President to develop 23M new business
- Developed curriculum for Sales training

Geoscience International, 1994 - 2001

- Processed magnetic and radiometric data to define oil field composition
- Performed chemical analysis of soil during hydrocarbon exploration
- Technical sales responsibilities

Education

- BS, Physics; double-minor, Mathematics and Chemistry, University of Northern Iowa
- MA, Public Administration, University Texas at Arlington

Lisa Whitsett

Efficient Facilities International, Inc., Present

- Co-founder and SVP Corporate Development
- Facilitate Operational and Human Resources processes
- Responsible for corporate communication and web development

Hitachi Consulting (Formerly Experio Solutions), 2001 – 2003

- Responsible for design and development of enterprise-wide KM system; integration with enterprise-wide systems to user base of 1000; content management of 20 communities; led the integration of KM system during acquisitions

- Responsible for design, development, and implementation of enterprise-wide communication plan to employee base of 850

Andersen (Formerly Arthur Andersen LLP), 1996 – 2001

- Responsible for communication planning, change management, KM, process reengineering, project management, HR management, performance management, communities of practice design and development per client contracts to employee bases of 100 – 10,000

Education

- BA, Sociology, Law minor, University California at San Diego
- MA, Mental Health Counseling, University of Northern Iowa

Jerry Kohlscheen

Efficient Facilities International, Inc., Present

- Strategy and Operations Officer, manage operational activities for AFS

Pendleton Woolen Mills, Inc., 1984 - 2003

- Operations Manager for Midwest Region
- Responsible for all aspects of manufacturing operations
- Executive team development responsible for 100M in product sales
- Human Resource process development inclusive of; labor negotiations, government compliance, Workers Compensation, and result-oriented employee development programs
- Established and coordinated the implementation of new Product
- Enhancement Department
- Introduced new analytical software
- Nation-wide engineering and consulting support

Iowa Western Community College, 2002 – 2003

- Responsible for development of Warehouse Management Certificate Program
- Adjunct lecturer on process controls including, Capacity Requirements
- Planning, Master Production Scheduling, Just-In-Time Techniques, and Production Activity Controls

Education

- BS, Manufacturing Engineering Technology, University of Nebraska
- MBA, Business Administration/Management Information Systems, Creighton University



References: Facility Support Services

Gunter Independent School District—6 Years of Service
Dr. Jill Siler, Superintendent
Gunter, TX 75058
903.433.4750

Era Independent School District—2 Years of Service
Jeremy Thompson, Superintendent
Era, TX 76238
940.665.2007

Collinsville Independent School District—1 Years of Service
Dwain Milam, Superintendent
Collinsville, TX 76233
903.429.6272

Lake Country Christian School—2 Years of Service
Dana Rachal, Business Administrator
Fort Worth, TX 76179
817.238.8703

Hill School Fort Worth—2 Years of Service
Audrey Boda-Davis, Executive Director
Ft. Worth, TX 76133
817.923.9482

Good Shepherd Catholic Community—10 Years of Service
Michael Vinez, Business Administrator
Colleyville, TX 76043
817.421.1387

Beryl Companies—10 Years of Service
Michael Baldock, FMP
Bedford, TX 76021
817.785.5070

Harvest Christian School—1 Year of Service
Craig Norton, Chief Operating Officer
Watauga, TX 76148
817.485.2703

Crossroads Christian Church—10 Years of Service
Steve Ivy, Facility Manager
Grand Prairie, TX 76015
817.557.2277



Franchise Tax Account Status

As of: 08/14/2013 09:06:02 AM

This Page is Not Sufficient for Filings with the Secretary of State

EFFICIENT FACILITIES INTERNATIONAL, INC.	
Texas Taxpayer Number	10106115420
Mailing Address	802 PORT AMERICA PL STE 100 GRAPEVINE, TX 76051-7609
Right to Transact Business in Texas	ACTIVE
State of Formation	TX
Effective SOS Registration Date	02/05/2002
Texas SOS File Number	0800052619
Registered Agent Name	STEVEN E. WILLS
Registered Office Street Address	753 PORT AMERICA PLACE STE 205 GRAPEVINE, TX 76051



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
8/14/2013

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Box Insurance Agency 1200 S. Main Street, Ste. 1600 Grapevine TX 76051	CONTACT NAME: Certificates Administrator PHONE (A/C, No, Ext): 817-865-1806 E-MAIL ADDRESS: Certificates@boxinsurance.com	FAX (A/C, No): 817-424-1404
	INSURER(S) AFFORDING COVERAGE	
INSURED EFFI-F1 Efficient Facilities 802 Port America Place, Suite 100 Grapevine TX 76051	INSURER A : Utica Mutual Insurance	NAIC # 25976
	INSURER B : The Hartford	NAIC # 12696
	INSURER C : America First Insurance	
	INSURER D :	
	INSURER E :	

COVERAGES **CERTIFICATE NUMBER:** 575660544 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
C	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC	Y	Y	BKO55491944	7/15/2013	7/15/2014	EACH OCCURRENCE	\$2,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$300,000
							MED EXP (Any one person)	\$10,000
							PERSONAL & ADV INJURY	\$2,000,000
							GENERAL AGGREGATE	\$4,000,000
							PRODUCTS - COMP/OP AGG	\$4,000,000
								\$
C	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS HA 99 16 07/	Y	Y	BAS55491944	7/15/2013	7/15/2014	COMBINED SINGLE LIMIT (Ea accident)	\$1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$10,000			USO55491944	7/15/2013	7/15/2014	EACH OCCURRENCE	\$5,000,000
							AGGREGATE	\$5,000,000
								\$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		Y / N N / A	4102854	1/30/2013	1/30/2014	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTH-ER	
							E.L. EACH ACCIDENT	\$1,000,000
							E.L. DISEASE - EA EMPLOYEE	\$1,000,000
							E.L. DISEASE - POLICY LIMIT	\$1,000,000
B	Third Party Crime			00TP0251642	7/15/2013	7/15/2014	Employee Theft	\$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)
Please see attached endorsements.

CERTIFICATE HOLDER

Aubrey ISD
415 Tisdell
Aubrey TX 76227

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE
Box Insurance Agency

AUBREY

INDEPENDENT SCHOOL DISTRICT



Request for Proposal

Integrated Facility Reporting & Support Services

Aubrey Independent School District
415 Tisdell Lane
Aubrey, TX 76227

REQUEST FOR PROPOSAL

1.1 Request for proposal will be received in the office of Dr. James Monaco, CFO, Aubrey Independent School District, 415 Tisdell Lane, Aubrey, Texas 76227:

Integrated Facility Reporting & Support Services to include:

Backflow inspections, certification, & reporting
Consumable supplies inventory management
Creation and implementation of a district-wide energy management plan
Creation and implementation of a district-wide deferred maintenance program
Creation and implementation of a reserve analysis for facility asset replacement planning
Electrical maintenance and repair services
Equipment and tools necessary to physically maintain all district buildings
Fire panel inspection, maintenance, & reporting
HVAC maintenance, repair, & reporting
IPM (pest management services) services & reporting
Interior and exterior lighting maintenance and repair services
Inventory management of all facility service supplies, equipment, & parts
Grounds maintenance reporting
Plumbing maintenance, repair services, & reporting
Janitorial services reporting
Required city and state inspections for all district facilities
Roof inspections, general maintenance, & reporting
Maintenance services including tracking & reporting
Supplies and parts necessary to maintain district facilities
Provide online – web based facility portal
Provide smart phone based facility maintenance work order entry system
Provide school board members with district wide facilities reporting every two months
All other services required to maintain district-wide facility operations

Date and Time due:

Thursday, August 15, 2013 @ 2:00 p.m.

One (1) original and two (2) copies of the proposal are required

Sealed Proposals should be delivered by the required date and time to:

James Monaco, CFO
Aubrey Independent School District
415 Tisdell Lane, Aubrey, Texas 76227

Email and/or faxed proposals will not be accepted. Late proposals will be disqualified.

Notice to Bidders

The Aubrey Independent School District (AISD) will receive RFP's for **Integrated Facility Reporting & Support Services** at the Aubrey ISD Administrative Office, 415 Tisdell Lane, Aubrey, Texas 76227, on August 15, 2013 at 2:00 p.m., at which time proposals will be acknowledged and received.

The District reserves the right to reject any or all proposals or any part of a proposal or to accept any proposal or part of a proposal deemed advantageous to the District and to waive any or all informalities.

The District reserves the right to modify any part of the document at its discretion.

Presentations

AISD may invite the most responsive firms(s) to give oral presentations and respond to questions.

General Terms and Conditions

2.1 All existing facilities including all campuses, Maintenance, Transportation, auxiliary buildings, cafeterias and athletic facilities will be included in the proposal. In addition, any new facilities completed during the term of this agreement will be automatically included.

2.2 Vendor may not assign or transfer this agreement nor its rights and privileges granted under this agreement, either in whole or part, without written consent of AISD.

2.3 AISD reserves the right to accept or reject all or any part of any proposal, waive minor technicalities, and award the proposal to service the best interest of AISD. THIS IS A NEGOTIATED PROCUREMENT, and as such, the District reserves the right to negotiate any terms, conditions, or pricing with a Proposer prior to an award.

2.4 All items and services must conform to all appropriate local, state, and federal laws, ordinances and regulations.

2.5 In evaluating qualified proposals, the following considerations will be taken into account for award recommendations: overall quality and value to the district, suitability for the intended purpose, vendor's service and delivery capabilities, overall price and commissions, and service history and any other relevant factor specifically listed in the RFP.

2.6 AISD reserves the right to cancel this agreement without pecuniary risk or penalty upon written notice of the intent. The board reserves the right to cancel this agreement upon written notice of the intent.

2.7 In the event that the contractor is non-compliant with any portion of the contract, AISD will provide the contractor 15 days written notice to comply. If compliance is unsatisfactory after 30 days, the final written notice may be given to terminate the contract 30 days thereafter. If contract is not to be renewed, AISD will give the contractor 60 days written notice.

2.8 Agreement Components: Any or all portions of this proposal and all portions of the vendor's proposal shall be incorporated by reference as part of the final agreement.

2.9 AISD Obligations: AISD accepts no obligations for costs incurred by vendors responding to this proposal or the award. AISD reserves the right to select proposals without discussion with the vendors. It is understood that proposals shall become part of AISD's official files. Retention of these proposals does not obligate AISD to any action. AISD reserves the right to reject any and all proposals received.

2.10 Taxes: AISD is exempt from state, federal, and local taxes, and will not be responsible for any taxes levied on the contractor resulting from this proposal.

2.11 Aubrey Independent School District (AISD) will use the following considerations to take into account to determine the best value for the District.

- the purchase price;
- the reputation of the vendor and of the vendor's goods or services;
- the quality of the vendor's goods or services;
- the extent to which the goods or services meet the district's needs;
- the comfort level with company representatives
- the total long-term cost to the district to acquire the vendor's goods or services;
- the ability of vendor to deliver and support all facility service operations;
- the ability of the vendor to implement a district-wide energy management plan;
- the ability of the vendor to implement a deferred maintenance plan;
- the ability of the vendor to implement an asset replacement program; and
- any other relevant factor specifically listed in the request for bids and proposals

Insurance

3.1 Vendor shall provide evidence of liability insurance with their proposal. AISD retains the right of approval for insurance coverage.

3.2 Copies of the successful contractor's liability insurance and workman's compensation certificates will be required.

Insurance Requirement Limits:

A. General Liability	General Aggregate	\$4,000,000
	Products-Comp/ or Agg	\$4,000,000
Commercial General Liability	Personal & Adv. Injury	\$2,000,000
Claims Made Occur.	Each Occurrence	\$2,000,000
Owner's Contractor's Prot.	Damage to Rented Premises	\$300,000
	Med. Expense (any one person)	\$10,000
B. Automobile Liability	Combined Single Limit	\$1,000,000
Any Auto	Bodily Injury (per person)	
Any Auto	Bodily Injury (per accident)	
Any Auto	Property Damage (per accident)	
C. Umbrella from Excess Liability	Each Occurrence	\$4,000,000
	Aggregate	\$4,000,000
D. Worker's Compensation	Statutory Limits	
	Each Accident	\$1,000,000
	Disease Policy Limit	\$1,000,000
	Disease Each Employee	\$1,000,000
E. Third Party Crime	Employee Theft	\$1,000,000

3.3 The insurance requirements as listed above apply to any subcontractor in the event that any work is sublet. The contractor is responsible to insure that the subcontractor meets the minimum insurance requirement limits as by law.

3.3.1 Should any of the above described policies be canceled before the expiration date, the issuing company will mail thirty (30) days written notice to the certificate holder, AISD.

3.3.2 The contractor shall agree to waive all right of subrogation against the district, its officials, employees and volunteers for losses arising from the work performed by contractor for the district.

3.3.3 Vendor shall indemnify and hold harmless the AISD and its Board of Trustees, officers, agents, and employees from all suits, actions, losses, damages, claims or liability of any character, type, or description, including but not limited to all expenses of litigation, court cost, penalties, and attorney's fees the AISD incurs defending any action, suite, or claim from any source whatsoever and of any kind or nature arising directly or indirectly on the part of vendor, its agents, servants, employees, contractors, and supplies, out of the operation under this agreement.

3.3.4 The selected vendor will be required to supply an insurance certificate naming AISD as an additional insured.

**** YOU ARE REQUIRED TO SUBMIT A CERTIFICATE OF INSURANCE FOR THE ABOVE INSURANCE REQUIREMENTS WITH YOUR PROPOSAL ****

Start Date/Contract Term

The successful contractor will begin service on September 1, 2013. Contract will be for one (1) year and renewable for up to four (4) one-year terms with the consent of both parties for a total of five (5) years. Notice of intent to extend will be given at least 60 days in advance of the expiration of each term.

Final approval for any extensions shall be made by AISD. In case of extensions, that cost per month which was submitted in the contractor's proposal may be increased or decreased.

During extensions this cost figure may be changed in accordance with any change which may have occurred in the United States Consumer Price Index (CPI) over the preceding twelve months effective 45 days prior to the termination of the contract period in question or reflect any changes made to the Federal Minimum Wage or applicable State Minimum Wage.

Payments

After approval the invoice will be forwarded for payment. Payment will be made monthly on a net 15 day schedule.

Firm Offer

Each vendor must agree in advance in written form to submit a proposal with costs figures which will be firm for at least 60 calendar days after the opening date of the proposals.

A written award or contract furnished to the successful offerer, within the time for acceptance specified in the offer, shall be deemed to result in binding contract without further action by either party.

Contract Award

The selection of a service provider is planned to be **finalized and announced at the August 31, 2013 board meeting.** This decision will be the one that AISD determines to be in its best interest, most responsive to its needs, and offers the greatest benefit for the proposed cost.

Addenda

Any "Addenda" or Instructions to Contractors issued by the AISD prior to the time for receiving bids shall be covered in the proposal and in closing a contract they shall become a part thereof.

Proposal Format

Proposals must be submitted in the form outlined here. The materials submitted must be in sequence and related to the Request for Proposal. AISD will make no reimbursement for the cost of developing or presenting proposals in response to the Request.

A. Company Profile

History of company, year founded, philosophy or mission statement, description of types and number of accounts served, number of employees, ownership of company, business classification (corporation, partnership, sole proprietorship) and any other names the company has operated under in the past 10 years.

B. Qualifications

1. Each vendor shall submit evidence of qualification which would influence the ability to satisfactorily provide integrated facility reporting and services defined elsewhere in this document (see Evaluation Criteria for additional pertinent details). Vendor must have provided integrated facility services for a minimum of ten (10) years.
2. Vendor must submit, along with contact name and phone number, at least five (5) clients of similar size, type, and scope that have for the last five (5) years received integrated facility support from vendor.
3. Vendor is required to list all educational contracts lost in the last 5 years along with reason for cancellation or non-renewal. AISD reserves the right to contact these businesses, institutions, etc. And request that contact information be included for each account. Failure to comply will result in rejection of proposal.
4. Vendor must be in Good Standing with the State of Texas, Secretary of State. Provide the date of incorporation and a current Secretary of State certificate showing the company to be in good standing.
5. Provide certificate of liability insurance that meets the requirements outlined in section 3.1 – 3.3.4 of this document.

C. Support Services Plan and Policies

1. Outline the technical reporting capabilities received by the AISD for all facility service functions. This includes all services such as, HVAC maintenance, plumbing service, electrical, lighting, grounds, janitorial, etc.
2. Explain process for general maintenance services, facility operations reporting, parts inventory management, deferred maintenance management, energy management, reserve analysis development and management, and emergency management procedures.
3. Explain process for all recurring building inspections including, but not limited to: fire systems, fire extinguishers, wet systems, fire safety inspections, roof inspections,

backflow preventers, and all other local, state, or federal facility or building related inspections required by an educational institution of AISD scale.

4. Explain reporting and service delivery plan for campuses.
5. Provide resumes or bios for key corporate employees or on-site management.

D. Operations Plan and Policies

1. Explain quality control procedures.
2. Firms must have a software reporting program to be used by contracted employees and district personnel. The program should be web/internet based with access granted to AISD personnel in order to view monthly performance reports, verify that daily facility maintenance tasks are complete, create and track jobs or project requests, view HVAC system reports and logs, view daily time and attendance by all staffed personnel (punch in and out recording).
3. Firm must have online work order system for submitting and tracking of all maintenance tickets with corresponding report capabilities.
4. Explain how vendor will be accountable for service problems and failures.
5. Explain emergency procedures.
6. Include training plans and procedures that will be implemented at AISD.
7. Explain security plans and procedures including your company's background check procedure on all personnel.
8. Provide description of uniforms to be worn by contract personnel.

E. Pricing

1. Please show pricing on an annual, monthly, and weekly basis by service type – see section 1.1 of this document for a full list of contracted facility services. Include the corresponding contracted hours delivered by service type per week. Represent all associated cost as a fixed recurring annual fee. This includes all labor, parts, and material to support AISD's facility related operational needs per year.
2. List hourly rates for emergency situations and work not included in the original contract price.

Facilities

To the extent possible, information regarding covered square footage will be furnished to the contractor in **Appendix I**. It shall be the responsibility of the contractor to verify measurements, district assets and equipment, and specifications as deemed applicable for the submission of a proposal.

Student Population

Student population by school campus/building provided to contractor in **Appendix I**.

Insurance

The contractor shall provide at all times during the contract period insurance coverage that meets the requirements outlined in section 3.1 – 3.3.4 of this document. Insert copy of certificate of liability insurance naming AISD as an additional insured.

Personnel

All matters pertaining to the recruitment, screening, hiring, and retention shall be the exclusive responsibility of the contractor. These matters shall be done fully in compliance with existing statutes and regulations pertaining to affirmative action, non-discrimination, wage and hour and any other stipulations germane to prudent personnel management.

All employees must undergo and pass a thorough background screening and check prior to employment with contractor. Contractor must perform both social security verification and criminal history screenings. Fingerprint background checks are required in applicable states.

Only those personnel who have been properly trained shall be assigned duties under this contract.

All personnel shall be dressed in uniforms in a manner authorized by the contractor and approved by AISD. The personnel shall be neat and clean in appearance. Uniforms and picture identification badges shall be worn which fully identify the worker as a member of the contractor's work force.

Contractor shall be responsible for the submission of police clearance records for each staffed employee within 24 hours upon request.

All employees will be bonded in the amount of \$50,000 (3rd Party Fidelity Bond).

Any employee whose work habits and/or conduct is deemed objectionable shall be removed from the work force upon request of the authorized AISD representative.

Safety

The contractor shall be responsible for the training as necessary in the application and use of equipment needed to facilitate safe conditions outlined by OSHA for the employees, and the district's students and staff.

Security

The contractor shall be responsible for training employees in security requirements of AISD, and shall be responsible for the enforcement of the same.

1. The Contractor shall be responsible for safeguarding against loss, theft, or damage of all AISD property, materials, equipment and accessories which might be exposed to the Contractor's personnel.
2. Guns, knives or other dangerous weapons shall not be allowed on campus.
3. Alcohol and drugs are prohibited on the campus.
4. Keys should be properly handled to maintain property security and safety. Additionally, contractor shall be fully responsible for the replacement of any lost keys. Please outline your key control procedures.

Supervision

EFI will provide supervision for their personnel for daily activities and emergency situations.

Damage

Contractor shall be responsible for the repair/replacement to the satisfaction of AISD's representative of any damage to the facility caused by any employee of this contract.

Equipment and Supplies/Materials

The procurement and maintenance of all equipment required for the successful execution of this contractual obligation shall be the contractor's responsibility.

AISD will provide locked storage spaces, but it shall not be responsible for losses, which may be incurred due to theft and/or vandalism.

All equipment shall be maintained properly, and kept in clean working condition.

The Contractor must furnish all needed safety equipment and protective devices necessary for the safety of all Building occupants and property of AISD.

Emergencies

All emergency conditions shall be promptly reported to the District's authorized representative. An hourly cost for emergency services occurring after regular work hours should be included in your pricing.

Contract Manager

A contract manager shall be appointed within ten (10) days after receipt of contract, and this person shall be available as deemed necessary by the representative for purposes of reporting problems, planning work or facility projects, etc. The Contract Manager for AISD shall be the main contact person for routine daily matters.

Appendix I – SF and Student Population

Aubrey High School – 129,481 SF
Aubrey Middle School – 90,762 SF
Brockett Elementary – 49,600 SF
Monaco Elementary – 64,026 SF
Aubrey Central Administration – 4,548 SF
Early Bird Learning Center – 15,720 SF

Student Population - 2002