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Step By Step

by *Michael Schaffer*

Taking bids for any type of product or service can be a harrowing experience for school facility managers. Some managers may not be well prepared for the process or may underestimate the steps involved. And, because many contractors require multi-year contracts, accepting a bid is an important decision — one that can affect a school or district for years to come.

Taking bids for any type of product or service — including construction, supplies and security and janitorial services — can be a harrowing experience for school facility managers. Some managers may not be well prepared for the process or may underestimate the steps involved. And, because many contractors require multi-year contracts, accepting a bid is an important decision — one that can affect a school or district for years to come.

But there is no scientific way to successfully take bids — a process also known as request for proposals (RFPs) — and there are no courses in college or business school that particularly address how to go about the process properly. As a result, most school managers learn the procedure through trial and error. Unfortunately, the errors may be what they remember the most.

Schools often take bids and outsource cleaning services, so the steps that one follows when hiring a building service contractor (BSC) can be used as an example of how to take bids in general. Many, if not all, of these steps will also apply when accepting bids from other types of service companies.

First Things First

The first step in the bidding process does not actually involve the vendor or, in this example, the building service cleaning contractor at all. It's about the facility(ies) and its needs. Before meeting with any contractors, facility managers must decide exactly what level of service they want, what services and cleaning tasks they want performed, how frequently they want service, what insurance they will require of the vendor, and so on.

Additionally, because green issues such as green cleaning are so central today, managers must decide if they want the contractor to use green cleaning products and related procedures as well as more technologically advanced cleaning equipment. These decisions will likely impact bid estimates only slightly, if at all; however, going through the process of clarifying their own desires will help managers explore the contracting company's ability to provide the services they need.

By making use of peer networking, consulting with cleaning product distributors and experts and doing their own research, school managers should work out an estimated price range of bid estimates. Referencing current charges and past costs for cleaning the facility in question should help. It can also be helpful to find out what other schools or school districts of comparable size and service requirements are paying. Again, apply this to the pricing of other types of services such as security, landscaping, painting, etc.

Getting Down to the Nitty-Gritty

The first step in taking bids typically involves sending out requests. Managers may already have a list of contractors that they can notify, or they might instead place advertisements in various print and online publications. In either case, managers should be specific — be sure to outline what the RFP covers, the requirements, when the bids are due and how contractors can arrange to view the facilities that will be cleaned.

Once the contractors who will bid have been selected, the next step is scheduling visits to the school. Some managers prefer to have one tour for all contractors at a specific time. This can be

more efficient and also lets everyone know who is bidding on the contract, possibly making the bidding process a bit more competitive.

Other managers prefer to schedule individual meetings with each eligible contractor. Although this can be more time consuming, it allows managers to get to know the potential contractors on a more personal level; it also provides more confidentiality. Managers who select this option often realize that this could be the start of a long-term relationship and that gauging their comfort level with a service provider in person — rather than in a group setting — is easier than trying to do so over e-mail, via phone conversations or with a bid estimate on paper.

Receiving Bids and Checking References

Specifying a proposal due date is important. Some managers start weeding out which proposals they will reject based on which contractors miss the deadline. Their view is that if a contractor cannot honor this early requirement, then chances are good that the company would not adequately meet other building needs and requirements.

Along with the estimate or charge, the proposal should include an outline of services based on the RFP. Insurance certificates and documentation should be attached. Some contractors will include interior and exterior images and possibly even before-and-after photos of facilities they have serviced previously. And most contractors, whether asked to or not, will provide a list of references with contact information.

A list of references enables managers to follow up with a company's customers and share ideas. Other managers might use this information to go a step further, visiting the reference locations and speaking with the facilities' decision makers regarding the cleaning company's level of service.

Most managers realize that the references the contractor provides are typically happy clients. Therefore, as managers narrow down the list of possible candidates, they may call and ask for additional references. This will determine if the company can provide other satisfied clients on the fly.

Evaluating the Bid Estimates

As mentioned previously, successful school managers will reach out to other comparable educational facility managers and experts in the field to determine the price range of bids to expect before accepting any. This information allows them to weed out the contractors that have bid too high or too low. Such bids often indicate that a firm may provide more or less services than outlined in the RFP or that it simply does not fully understand the scope of the services required.

If payment procedures were not included in the RFP, managers must make sure they understand when invoices will be submitted, how they will be submitted and when the contractor expects payments. Few contractors now invoice their customers at the end of the month for service. Instead, most submit invoices at the start of the month for the month of service with a payment due date at the end of that month. (This may vary with the type of service.) Be sure to check the contract for a late payment charge or interest charges and for a "stop work" clause should payments become too far in arrears.

The Equipment Issue

Facility managers often assume that a contractor will have the proper equipment necessary to perform the services they have been hired to do. A wise manager, however, will be sure to do a little inquiring during the bidding process to be certain of this fact. Using the proper equipment can make a big difference when it comes to worker productivity, costs and charges, safety and the health of the facility being serviced.

For example, some contractors may use relatively old floor care equipment. Older machines can use a lot of water and chemical, having negative environmental impacts, and they may not do much to improve worker productivity. Increased worker productivity typically translates into lower costs for the contractor and ultimately the facility being maintained.

Ask about the equipment that will be used in the facility. Is it environmentally preferable? Has it been certified either by the Carpet and Rug Institute (for carpet care) or another reputable organization? Are the floor machines "world class" machines (meaning they have been designed for use on all kinds of floors by all types of workers, whether they are tall, short, experienced or not so experienced)?

Final Thoughts

It is important that school managers be patient and take their time during the bidding process. Taking bids can be a lengthy, complex and stressful process, but it is also critically important. The decision can have long-term repercussions, and patience can help ensure that the best contractor with the most competitive price is selected while also making the entire process far more comfortable.

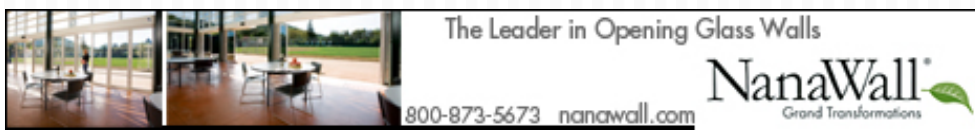
Michael Schaffer is president of Tornado Industries and CFR, manufacturers of professional cleaning equipment. He has also been a janitorial distributor, working directly with schools to keep their facilities clean and healthy at a competitive price.

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PETER LI  **EDUCATION GROUP**

2621 Dryden Road, Suite 300
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Ph: (800) 523-4625
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