



ELEVATOR SERVICES, REPAIR, MAINTENANCE, INSPECTION/TESTING, PARTS, AND MODERNIZATION  
Executive Summary

**Lead Agency:** University of California

**Solicitation:** #000289-APR2018

**RFP Issued:** April 24, 2019

**Pre-Proposal Date:** May 3, 2019

**Response Due Date:** June 3, 2019

**Proposals Received:** 8

**Awarded to:** Lerch Bates

The University of California Office of the President issued RFP #000289-APR2018 on April 24, 2019, to establish a national cooperative contract for Elevator Services, Repair, Maintenance, Inspection/Testing, Parts, and Modernization.

The solicitation included cooperative purchasing language in Sections D:

The University of California, as the Principal Procurement Agency, defined in Exhibit A, has partnered with OMNIA Partners to make the resultant contract (also known as the “Master Agreement” in materials distributed by OMNIA Partners) from this solicitation available to other public agencies nationally, including state and local governmental entities, public and private primary, secondary and higher education entities, non-profit entities, and agencies for the public benefit (“Public Agencies”), through OMNIA Partners’ cooperative purchasing program. The UC is acting as the contracting agency for any other Public Agency that elects to utilize the resulting Master Agreement. Use of the Master Agreement by any Public Agency is preceded by their registration with OMNIA Partners (a “Participating Public Agency”). Exhibits A through H contain additional information about OMNIA Partners and the cooperative purchasing agreement.

Notice of the solicitation was sent to potential offerors, as well as advertised in the following:

- CalUsource website
- OMNIA Partners, Public Sector website
- USA Today, nationwide
- Arizona Business Gazette, AZ
- San Bernardino Sun, CA
- Honolulu Star-Advertiser, HI
- The Advocate – New Orleans, LA
- New Jersey Herald, NJ
- Times Union, NY
- Daily Journal of Commerce, OR
- The State, SC
- South Carolina website/newsletter (get from Chris White)
- Houston Community Newspapers, Cy Creek Mirror, TX
- Deseret News, UT
- Richmond Times, VA
- Seattle Daily Journal of Commerce, WA
- Helena Independent Record, MT

On June 3, 2019 proposals were received from the following offerors:

- Van Deusen & Associates, Inc.
- Kone Inc.
- Otis Elevator Company
- Smartrise Engineering
- Liftech Elevator Services, Inc.
- Amtech
- Lerch Bates
- National Elevator Inspection Service

The proposals were evaluated by an evaluation committee. Using the evaluation criteria established in the RFP, the committee elected to enter into negotiations with Van Deusen & Associates, Inc., Kone Inc., Otis Elevator, Lerch Bates, Smartrise Engineering and National Elevator Inspection Service. The University of California completed negotiations and made successful contract awards with Van Deusen & Associates, Inc., Kone Inc., Otis Elevator, and Lerch Bates.

The University of California, OMNIA Partners, Public Sector and Lerch Bates successfully negotiated a contract, and the University of California executed the agreement with a contract (#2019.001568) effective date of October 1, 2019.

Contract includes:

- Elevator Consulting
- Due Diligence
- Inspection
- Maintenance Consulting and Project Management
- Modernization Consulting and Project Management

Term:

Initial five (5) year agreement from October 1, 2019 through September 30, 2024 with the option to renew for five (5) additional one (1) year periods through September 30, 2029.

Pricing/Discount:

See pricing files  
Volume discounts

OMNIA Partners, Public Sector Web Landing Pages:

<https://www.omniapartners.com/publicsector/contract/supplier-contracts/lerchbates>