

*Proposal for*

# Region 14 Education Service Center (“ESC”)

Facilities Management Solutions and Related Services



**TDIndustries**

*At the Heart of Your Building*

July 22, 2021



# NCPA

National Cooperative Purchasing Alliance



# TABLE OF CONTENTS

- Tab 1 Contents: ..... 1**
  - Master Agreement ..... 2
- Tab 2 Contents: ..... 11**
  - NCPA Administration Agreement ..... 12
- Tab 3 Contents: ..... 16**
  - Vendor Questionnaire ..... 17
- Tab 4 Contents: ..... 20**
  - Vendor Profile ..... 21
    - Products ..... 29
    - Services ..... 34
    - Safety ..... 39
    - Marketing/Sales ..... 39
    - Administration ..... 42
    - Green Initiatives ..... 43
    - Licenses ..... 44
- Tab 5 Contents: ..... 45**
  - TD Case Studies ..... 62
- Tab 6 Contents: ..... 75**
- Tab 7 Contents: ..... 78**
- Tab 8 Contents: ..... 79**
  - Additional Information ..... 80
    - Attachment “G-1” ..... 84
    - Attachment “G-2” ..... 86
    - Attachment “G-3” ..... 88
    - Attachment “G-4” ..... 90
    - Attachment “G-5” ..... 92
    - Truck Based Services ..... 92

# TABLE OF CONTENTS

**Tab 9 Contents:** ..... **95**

**Appendix:** ..... **108**

- Life-Cycle Solutions ..... 109
- Safety ..... 109
- TD's Safety Manual ..... 112
- Diversity Programs ..... 113
- Quality Assurance Plan ..... 114

# TAB 1 - MASTER AGREEMENT/SIGNATURE FORM

## TAB 1 CONTENTS:

MASTER AGREEMENT AND SIGNATURE FORM

# Tab 1 – Master Agreement

## General Terms and Conditions

---

- ◆ Customer Support
  - The vendor shall provide timely and accurate technical advice and sales support. The vendor shall respond to such requests within one (1) working day after receipt of the request.
  
- ◆ Disclosures
  - Respondent affirms that he/she has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with this contract.
  - The respondent affirms that, to the best of his/her knowledge, the offer has been arrived at independently, and is submitted without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this contract.
  
- ◆ Renewal of Contract
  - Unless otherwise stated, all contracts are for a period of one (1) year with an option to renew for up to four (4) additional one-year terms or any combination of time equally not more than 4 years if agreed to by Region 14 ESC and the vendor.
  
- ◆ Funding Out Clause
  - Any/all contracts exceeding one (1) year shall include a standard “funding out” clause. A contract for the acquisition, including lease, of real or personal property is a commitment of the entity’s current revenue only, provided the contract contains either or both of the following provisions:
    - Retains to the entity the continuing right to terminate the contract at the expiration of each budget period during the term of the contract and is conditioned on a best efforts attempt by the entity to obtain appropriate funds for payment of the contract.
  
- ◆ Shipments (if applicable)
  - The awarded vendor shall ship ordered products within the written estimate of delivery time by the vendor to the entity after the receipt of the order unless modified. If a product cannot be shipped within that time, the awarded vendor shall notify the entity placing the order as to why the product has not shipped and shall provide an estimated shipping date. At this point the participating entity may cancel the order if estimated shipping time is not acceptable. All deliveries shall be freight prepaid, F.O.B. destination.
  
- ◆ Tax Exempt Status
  - Since this is a national contract, knowing the tax laws in each state is the sole responsibility of the vendor.

- ◆ Payments
  - The entity using the contract will make payments directly to the awarded vendor or their affiliates (distributors/business partners/resellers) as long as written request and approval by NCPA is provided to the awarded vendor.
  
- ◆ Adding authorized distributors/dealers
  - Awarded vendors may submit a list of distributors/partners/resellers to sell under their contract throughout the life of the contract. Vendor must receive written approval from NCPA before such distributors/partners/resellers considered authorized.
  - Purchase orders and payment can only be made to awarded vendor or distributors/business partners/resellers previously approved by NCPA.
  - Pricing provided to members by added distributors or dealers must also be less than or equal to the pricing offered by the awarded contract holder.
  - All distributors/partners/resellers are required to abide by the Terms and Conditions of the vendor's agreement with NCPA.
  
- ◆ Pricing
  - All pricing submitted shall include the administrative fee to be remitted to NCPA by the awarded vendor. It is the awarded vendor's responsibility to keep all pricing up to date and on file with NCPA.
  - All deliveries shall be freight prepaid, F.O.B. destination and shall be included in all pricing offered unless otherwise clearly stated in writing
  
- ◆ Warranty
  - Proposals should address each of the following:
    - Applicable warranty and/or guarantees of equipment and installations including any conditions and response time for repair and/or replacement of any components during the warranty period.
    - Availability of replacement parts
    - Life expectancy of equipment under normal use
    - Detailed information as to proposed return policy on all equipment
  
- ◆ Indemnity
  - The awarded vendor shall protect, indemnify, and hold harmless Region 14 ESC and its participants, administrators, employees and agents against all claims, damages, losses and expenses arising out of or resulting from the actions of the vendor, vendor employees or vendor subcontractors in the preparation of the solicitation and the later execution of the contract.
  
- ◆ Franchise Tax
  - The respondent hereby certifies that he/she is not currently delinquent in the payment of any franchise taxes.



◆ Supplemental Agreements

- The entity participating in this contract and awarded vendor may enter into a separate supplemental agreement to further define the level of service requirements over and above the minimum defined in this contract i.e. invoice requirements, ordering requirements, specialized delivery, etc. Any supplemental agreement developed as a result of this contract is exclusively between the participating entity and awarded vendor.

◆ Certificates of Insurance

- Certificates of insurance shall be delivered to the Public Agency prior to commencement of work. The insurance company shall be licensed in the applicable state in which work is being conducted. The awarded vendor shall give the participating entity a minimum of ten (10) days notice prior to any modifications or cancellation of policies. The awarded vendor shall require all subcontractors performing any work to maintain coverage as specified.

◆ Legal Obligations

- It is the Respondent's responsibility to be aware of and comply with all local, state, and federal laws governing the sale of products/services identified in this RFP and any awarded contract and shall comply with all while fulfilling the RFP. Applicable laws and regulation must be followed even if not specifically identified herein.

◆ Protest

- A protest of an award or proposed award must be filed in writing within ten (10) days from the date of the official award notification and must be received by 5:00 pm CST. Protests shall be filed with Region 14 ESC and shall include the following:
  - Name, address and telephone number of protester
  - Original signature of protester or its representative
  - Identification of the solicitation by RFP number
  - Detailed statement of legal and factual grounds including copies of relevant documents and the form of relief requested
- Any protest review and action shall be considered final with no further formalities being considered.

◆ Force Majeure

- If by reason of Force Majeure, either party hereto shall be rendered unable wholly or in part to carry out its obligations under this Agreement then such party shall give notice and full particulars of Force Majeure in writing to the other party within a reasonable time after occurrence of the event or cause relied upon, and the obligation of the party giving such notice, so far as it is affected by such Force Majeure, shall be suspended during the continuance of the inability then claimed, except as hereinafter provided, but for no longer period, and such party shall endeavor to remove or overcome such inability with all reasonable dispatch.
- The term Force Majeure as employed herein, shall mean acts of God, strikes, lockouts, or other industrial disturbances, act of public enemy, orders of any kind of government of the

United States or any civil or military authority; insurrections; riots; epidemics; landslides; lighting; earthquake; fires; hurricanes; storms; floods; washouts; droughts; arrests; restraint of government and people; civil disturbances; explosions, breakage or accidents to machinery, pipelines or canals, or other causes not reasonably within the control of the party claiming such inability. It is understood and agreed that the settlement of strikes and lockouts shall be entirely within the discretion of the party having the difficulty, and that the above requirement that any Force Majeure shall be remedied with all reasonable dispatch shall not require the settlement of strikes and lockouts by acceding to the demands of the opposing party or parties when such settlement is unfavorable in the judgment of the party having the difficulty

◆ Prevailing Wage

- It shall be the responsibility of the Vendor to comply, when applicable, with the prevailing wage legislation in effect in the jurisdiction of the purchaser. It shall further be the responsibility of the Vendor to monitor the prevailing wage rates as established by the appropriate department of labor for any increase in rates during the term of this contract and adjust wage rates accordingly.

◆ Miscellaneous

- Either party may cancel this contract in whole or in part by providing written notice. The cancellation will take effect 30 business days after the other party receives the notice of cancellation. After the 30th business day all work will cease following completion of final purchase order.

◆ Open Records Policy

- Because Region 14 ESC is a governmental entity responses submitted are subject to release as public information after contracts are executed. If a vendor believes that its response, or parts of its response, may be exempted from disclosure, the vendor must specify page-by-page and line-by-line the parts of the response, which it believes, are exempt. In addition, the respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s).
- The determination of whether information is confidential and not subject to disclosure is the duty of the Office of Attorney General (OAG). Region 14 ESC must provide the OAG sufficient information to render an opinion and therefore, vague and general claims to confidentiality by the respondent are not acceptable. Region 14 ESC must comply with the opinions of the OAG. Region 14 ESC assumes no responsibility for asserting legal arguments on behalf of any vendor. Respondent are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.



# Process

---

Region 14 ESC will evaluate proposals in accordance with, and subject to, the relevant statutes, ordinances, rules, and regulations that govern its procurement practices. NCPA will assist Region 14 ESC in evaluating proposals. Award(s) will be made to the prospective vendor whose response is determined to be the most advantageous to Region 14 ESC, NCPA, and its participating agencies. To qualify for evaluation, response must have been submitted on time, and satisfy all mandatory requirements identified in this document.

- ◆ Contract Administration
  - The contract will be administered by Region 14 ESC. The National Program will be administered by NCPA on behalf of Region 14 ESC.
- ◆ Contract Term
  - The contract term will be for one (1) year starting from the date of the award. The contract may be renewed for up to four (4) additional one-year terms or any combination of time equally not more than 4 years.
  - It should be noted that maintenance/service agreements may be issued for up to (5) years under this contract even if the contract only lasts for the initial term of the contract. NCPA will monitor any maintenance agreements for the term of the agreement provided they are signed prior to the termination or expiration of this contract.
- ◆ Contract Waiver
  - Any waiver of any provision of this contract shall be in writing and shall be signed by the duly authorized agent of Region 14 ESC. The waiver by either party of any term or condition of this contract shall not be deemed to constitute waiver thereof nor a waiver of any further or additional right that such party may hold under this contract.
- ◆ Products and Services additions
  - Products and Services may be added to the resulting contract during the term of the contract by written amendment, to the extent that those products and services are within the scope of this RFP.
- ◆ Competitive Range
  - It may be necessary for Region 14 ESC to establish a competitive range. Responses not in the competitive range are unacceptable and do not receive further award consideration.
- ◆ Deviations and Exceptions
  - Deviations or exceptions stipulated in response may result in disqualification. It is the intent of Region 14 ESC to award a vendor's complete line of products and/or services, when possible.
- ◆ Estimated Quantities
  - The estimated dollar volume of Products and Services purchased under the proposed Master Agreement is \$20 million dollars annually. This estimate is based on the anticipated volume of Region 14 ESC and current sales within the NCPA program. There is no guarantee or commitment of any kind regarding usage of any contracts resulting from this solicitation

- ◆ Evaluation
  - Region 14 ESC will review and evaluate all responses in accordance with, and subject to, the relevant statutes, ordinances, rules and regulations that govern its procurement practices. NCPA will assist the lead agency in evaluating proposals. Recommendations for contract awards will be based on multiple factors, each factor being assigned a point value based on its importance.
- ◆ Formation of Contract
  - A response to this solicitation is an offer to contract with Region 14 ESC based upon the terms, conditions, scope of work, and specifications contained in this request. A solicitation does not become a contract until it is accepted by Region 14 ESC. The prospective vendor must submit a signed Signature Form with the response thus, eliminating the need for a formal signing process.
- ◆ NCPA Administrative Agreement
  - The vendor will be required to enter and execute the National Cooperative Purchasing Alliance Administration Agreement with NCPA upon award with Region 14 ESC. The agreement establishes the requirements of the vendor with respect to a nationwide contract effort.
- ◆ Clarifications / Discussions
  - Region 14 ESC may request additional information or clarification from any of the respondents after review of the proposals received for the sole purpose of elimination minor irregularities, informalities, or apparent clerical mistakes in the proposal. Clarification does not give respondent an opportunity to revise or modify its proposal, except to the extent that correction of apparent clerical mistakes results in a revision. After the initial receipt of proposals, Region 14 ESC reserves the right to conduct discussions with those respondent's whose proposals are determined to be reasonably susceptible of being selected for award. Discussions occur when oral or written communications between Region 14 ESC and respondent's are conducted for the purpose clarifications involving information essential for determining the acceptability of a proposal or that provides respondent an opportunity to revise or modify its proposal. Region 14 ESC will not assist respondent bring its proposal up to the level of other proposals through discussions. Region 14 ESC will not indicate to respondent a cost or price that it must meet to neither obtain further consideration nor will it provide any information about other respondents' proposals or prices.
- ◆ Multiple Awards
  - Multiple Contracts may be awarded as a result of the solicitation. Multiple Awards will ensure that any ensuing contracts fulfill current and future requirements of the diverse and large number of participating public agencies.
- ◆ Past Performance
  - Past performance is relevant information regarding a vendor's actions under previously awarded contracts; including the administrative aspects of performance; the vendor's history of reasonable and cooperative behavior and commitment to customer satisfaction; and generally, the vendor's businesslike concern for the interests of the customer.

# Evaluation Criteria

---

- ◆ Product & Services/Pricing (40 points)
  - Respondent(s)' products and services (e.g.; quality and breadth of product(s)/service(s), description(s) quality, reputation in the marketplace, average on time delivery rate and historical shipping timelines, return and restocking policies and applicable fees, average Fill Rate, shipping charges and other)
  - Competitive Level of Pricing for vendor's available products and services
  - Warranties on Respondent(s)' products and services (e.g.; availability of standard/extended warranties, pricing, detailed descriptions, ease of process and others)
  - Evidence of the ability of Respondent(s)' products and services to save members time and money (e.g.; breadth of service departments, technological advances, personnel experience, product(s) efficiencies, and others)
  - Other factors relevant to this section as submitted by the responder(s)
  
- ◆ Ability to Provide and Perform the Required Services for the Contract (25 points)
  - Response to emergency orders & service (e.g.; response time, breadth of service coverage, strength of meeting service and warranty needs of members)
  - Customer service/problem resolution (e.g.; technical abilities of service personnel; quality of processes,)
  - Invoicing process (e.g.; ease of use; transparency, billing resolutions)
  - Respondent(s)' processes, and quality of organizational structure
  - Contract implementation/Customer transition
  - Financial condition of vendor
  - Offeror's safety record (e.g.; benchmarks, lost hours, reporting)
  - Instructional materials and training (e.g.; administrative documentation, internal technical training, training of agencies)
  - Other factors relevant to this section as submitted by the proposer
  
- ◆ References (10 points)
  - A minimum of ten (10) customer references for product and/or services of similar scope dating within past 3 years
  
- ◆ Qualification and Experience (15 points)
  - Respondent(s)' reputation in the marketplace
  - Past relationship with Region 14 ESC and/or NCPA members
  - Experience with cooperative selling (e.g.; number of other cooperatives, Exhibited understanding of cooperative purchasing)
  - Experience and qualification of key employees
  - Location and number of sales persons who will work on this contract
  - Marketing plan and capability
  - Past experience working with the government sector

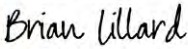
- Past litigation, bankruptcy, reorganization, state investigations of entity or current officers and directors
  - Completeness of response (e.g.; filled out all sections, answered all questions, provided pricing)
  - Other factors relevant to this section as submitted by the proposer
- ◆ Value Added Services Description, Products and/or Services (10 points)
- Marketing and agency Training
  - Customer Service
  - Sales force training (e.g.; internal training plan, corporate officer involvement, orientation commitment)
  - Marketing plan and capability (e.g.; contract rollout plan, benchmarks, goals)
  - Green initiative(s) (e.g.; philosophy, certificates, awards)
  - Quality and breadth of value add(s)
- Other factors relevant to this section as submitted by the proposer

# Signature Form

---

The undersigned hereby proposes and agrees to furnish goods and/or services in strict compliance with the terms, specifications and conditions at the prices proposed within response unless noted in writing. The undersigned further certifies that he/she is an officer of the company and has authority to negotiate and bind the company named below and has not prepared this bid in collusion with any other Respondent and that the contents of this proposal as to prices, terms or conditions of said bid have not been communicated by the undersigned nor by any employee or agent to any person engaged in this type of business prior to the official opening of this proposal.

Prices are guaranteed: **120 days**

Company name	TDIndustries, Inc.
Address	13850 Diplomat Dr.
City/State/Zip	Dallas, TX 75234
Telephone No.	972-888-9500
Fax No.	972-888-9507
Email address	brian.lillard@tdindustries.com
Printed name	Brian Lillard
Position with company	Vice President of Facilities Management Services
Authorized signature	<small>DocuSigned by:</small>  <small>0E754DB12068493...</small>

# TAB 2 - NCPA ADMINISTRATION AGREEMENT

## TAB 2 CONTENTS:

NCPA ADMINISTRATION AGREEMENT



# Tab 2 – NCPA Administration Agreement

---

This Administration Agreement is made as of August 16, 2021, by and between National Cooperative Purchasing Alliance (“NCPA”) and TDIndustries, Inc. (“Vendor”).

## Recitals

WHEREAS, Region 14 ESC has entered into a certain Master Agreement dated August 16, 2021, referenced as Contract Number 02-119, by and between Region 14 ESC and Vendor, as may be amended from time to time in accordance with the terms thereof (the “Master Agreement”), for the purchase of Facilities Management Solutions and Related Services;

WHEREAS, said Master Agreement provides that any state, city, special district, local government, school district, private K-12 school, technical or vocational school, higher education institution, other government agency or nonprofit organization (hereinafter referred to as “public agency” or collectively, “public agencies”) may purchase products and services at the prices indicated in the Master Agreement;

WHEREAS, NCPA has the administrative and legal capacity to administer purchases under the Master Agreement to public agencies;

WHEREAS, NCPA serves as the administrative agent for Region 14 ESC in connection with other master agreements offered by NCPA

WHEREAS, Region 14 ESC desires NCPA to proceed with administration of the Master Agreement;

WHEREAS, NCPA and Vendor desire to enter into this Agreement to make available the Master Agreement to public agencies on a national basis;

NOW, THEREFORE, in consideration of the payments to be made hereunder and the mutual covenants contained in this Agreement, NCPA and Vendor hereby agree as follows:

### ◆ General Terms and Conditions

- The Master Agreement, attached hereto as Tab 1 and incorporated herein by reference as though fully set forth herein, and the terms and conditions contained therein shall apply to this Agreement except as expressly changed or modified by this Agreement.
- NCPA shall be afforded all of the rights, privileges and indemnifications afforded to Region 14 ESC under the Master Agreement, and such rights, privileges and indemnifications shall accrue and apply with equal effect to NCPA under this Agreement including, but not limited to, the Vendor’s obligation to provide appropriate insurance and certain indemnifications to Region 14 ESC.
- Vendor shall perform all duties, responsibilities and obligations required under the Master Agreement in the time and manner specified by the Master Agreement.
- NCPA shall perform all of its duties, responsibilities, and obligations as administrator of purchases under the Master Agreement as set forth herein, and Vendor acknowledges that NCPA shall act in the capacity of administrator of purchases under the Master Agreement.
- With respect to any purchases made by Region 14 ESC or any Public Agency pursuant to the Master Agreement, NCPA (a) shall not be construed as a dealer, re-marketer, representative, partner, or agent of any type of Vendor, Region 14 ESC, or such Public Agency, (b) shall not be obligated, liable or responsible (i) for any orders made by Region

14 ESC, any Public Agency or any employee of Region 14 ESC or Public Agency under the Master Agreement, or (ii) for any payments required to be made with respect to such order, and (c) shall not be obligated, liable or responsible for any failure by the Public Agency to (i) comply with procedures or requirements of applicable law, or (ii) obtain the due authorization and approval necessary to purchase under the Master Agreement. NCPA makes no representations or guaranties with respect to any minimum purchases required to be made by Region 14 ESC, any Public Agency, or any employee of Region 14 ESC or Public Agency under this Agreement or the Master Agreement.

- The Public Agency participating in the NCPA contract and Vendor may enter into a separate supplemental agreement to further define the level of service requirements over and above the minimum defined in this contract i.e. invoice requirements, ordering requirements, specialized delivery, etc. Any supplemental agreement developed as a result of this contract is exclusively between the Public Agency and Vendor. NCPA, its agents, members and employees shall not be made party to any claim for breach of such agreement.

◆ **Term of Agreement**

- This Agreement shall be in effect so long as the Master Agreement remains in effect, provided, however, that the obligation to pay all amounts owed by Vendor to NCPA through the termination of this Agreement and all indemnifications afforded by Vendor to NCPA shall survive the term of this Agreement.

◆ **Fees and Reporting**

- The awarded vendor shall electronically provide NCPA with a detailed quarterly report showing the dollar volume of all sales under the contract for the previous quarter. Reports are due on the fifteenth (15<sup>th</sup>) day after the close of the previous quarter. It is the responsibility of the awarded vendor to collect and compile all sales under the contract from participating members and submit one (1) report. The report shall include at least the following information as listed in the example below:

Agency Name	State	Zip Code	Date	PO or Job #	RQN Number	Sale Amount	Admin Fee
-------------	-------	----------	------	-------------	------------	-------------	-----------


**Total**

- Each quarter NCPA will invoice the vendor based on the total of sale amount(s) reported. From the invoice the vendor shall pay to NCPA an administrative fee of three (3%) for the amount of the agency’s purchase order less any applicable sales tax and Performance and/or Payment bond cost. Vendor’s annual sales shall be measured on a calendar year basis. Deadline for term of payment will be included in the invoice NCPA provides.
- Supplier shall maintain an accounting of all purchases made by Public Agencies under the Master Agreement. NCPA and Region 14 ESC reserve the right to audit the accounting for a period of four (4) years from the date NCPA receives the accounting. In the event of such an audit, the requested materials shall be provided at the location designated by Region 14 ESC or NCPA. In the event such audit reveals an under reporting of Contract Sales and a resulting underpayment of administrative fees, Vendor shall promptly pay NCPA the amount of such underpayment, together with interest on such amount and shall be obligated to reimburse NCPA’s costs and expenses for such audit.

◆ General Provisions

- This Agreement supersedes any and all other agreements, either oral or in writing, between the parties hereto with respect to the subject matter hereof, and no other agreement, statement, or promise relating to the subject matter of this Agreement which is not contained herein shall be valid or binding.
- Awarded vendor agrees to allow NCPA to use their name and logo within website, marketing materials and advertisement. Any use of NCPA name and logo or any form of publicity regarding this contract by awarded vendor must have prior approval from NCPA.
- If any action at law or in equity is brought to enforce or interpret the provisions of this Agreement or to recover any administrative fee and accrued interest, the prevailing party shall be entitled to reasonable attorney’s fees and costs in addition to any other relief to which such party may be entitled.
- Neither this Agreement nor any rights or obligations hereunder shall be assignable by Vendor without prior written consent of NCPA, provided, however, that the Vendor may, without such written consent, assign this Agreement and its rights and delegate its obligations hereunder in connection with the transfer or sale of all or substantially all of its assets or business related to this Agreement, or in the event of its merger, consolidation, change in control or similar transaction. Any permitted assignee shall assume all assigned obligations of its assignor under this Agreement.
- This Agreement and NCPA’s rights and obligations hereunder may be assigned at NCPA’s sole discretion, to an existing or newly established legal entity that has the authority and capacity to perform NCPA’s obligations hereunder
- All written communications given hereunder shall be delivered to the addresses as set forth below.

**National Cooperative Purchasing Alliance:**

Name: Matthew Mackel  
 Title: Director, Business Development  
 Address: PO Box 701273  
 Houston, TX 77270  
 Signature:   
 Date: August 16, 2021

**Vendor:** TDIndustries, Inc.

Name: Brian Lillard  
 Title: Vice President of Facilities of Management Services  
 Address: 13850 Diplomat Dr.  
 Dallas, TX 75224  
 Signature:   
 Date: 7/2/2021



## NCPA Registered Vendor Quotation Number

RFP responders are requested to agree to a quotation number registration program to provide consistency and faster service for our facility awarded vendors, agency members and participants. The process will require Facility Contract holders to register and receive a NCPA Vendor Registered Quotation Number that must be prominently displayed on each proposal(s) that you present to the agencies. The system will track Facility transactions from the initial proposal stage to the completion of each project. NCPA has assembled an experienced Facilities Management Team that stands ready and willing to assist its vendors in providing quality services to the awarded vendor's organization. Failure to receive the Vendor Registered Quotation Number can result in potential delays to your services and the only acceptable proposals need to have a NCPA Vendor Registered Quotation Number.

## NCPA Registered Vendor Quotation Number Process

Fill out the form on the Facilities page at [www.NCPA.us](http://www.NCPA.us)

(Direct link is <http://www.ncpa.us/Facilities/Register>)

**\* Fill out and submit.**

- All registered vendor quotation number requests must be submitted *and* a proposal number received *before* you present it to your potential customer.
- You will have a response with a NCPA Vendor Registered Quotation Number within 4 hours.
- If you have an emergency and need a quotation number sooner, call any member of the Facility Management team and we will help you.
- Include the quotation number on all proposals.

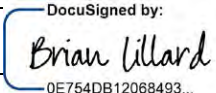
This document acknowledges that you have received and agree to the details, directions and expectations of the NCPA Vendor Registered Quotation Number process.

Date 7/2/2021

RFP Number 16-21

Company Name TDIndustries, Inc.

Printed Name Brian Lillard

Signature  0E754DB12068493...

# Tab 3 – Vendor Questionnaire

---

Please provide responses to the following questions that address your company’s operations, organization, structure, and processes for providing products and services.

◆ States Covered

- Bidder must indicate any and all states where products and services can be offered.
- Please indicate the price co-efficient for each state if it varies.

**50 States & District of Columbia** (Selecting this box is equal to checking all boxes below)

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Alabama              | <input type="checkbox"/> Maryland              | <input type="checkbox"/> South Carolina   |
| <input type="checkbox"/> Alaska               | <input type="checkbox"/> Massachusetts         | <input type="checkbox"/> South Dakota     |
| <input checked="" type="checkbox"/> Arizona   | <input type="checkbox"/> Michigan              | <input type="checkbox"/> Tennessee        |
| <input checked="" type="checkbox"/> Arkansas  | <input type="checkbox"/> Minnesota             | <input checked="" type="checkbox"/> Texas |
| <input type="checkbox"/> California           | <input type="checkbox"/> Mississippi           | <input checked="" type="checkbox"/> Utah  |
| <input checked="" type="checkbox"/> Colorado  | <input type="checkbox"/> Missouri              | <input type="checkbox"/> Vermont          |
| <input type="checkbox"/> Connecticut          | <input type="checkbox"/> Montana               | <input type="checkbox"/> Virginia         |
| <input type="checkbox"/> Delaware             | <input type="checkbox"/> Nebraska              | <input type="checkbox"/> Washington       |
| <input type="checkbox"/> District of Columbia | <input checked="" type="checkbox"/> Nevada     | <input type="checkbox"/> West Virginia    |
| <input type="checkbox"/> Florida              | <input type="checkbox"/> New Hampshire         | <input type="checkbox"/> Wisconsin        |
| <input type="checkbox"/> Georgia              | <input type="checkbox"/> New Jersey            | <input type="checkbox"/> Wyoming          |
| <input type="checkbox"/> Hawaii               | <input checked="" type="checkbox"/> New Mexico |   |
| <input type="checkbox"/> Idaho                | <input type="checkbox"/> New York              |   |
| <input type="checkbox"/> Illinois             | <input type="checkbox"/> North Carolina        |   |
| <input type="checkbox"/> Indiana              | <input type="checkbox"/> North Dakota          |   |
| <input type="checkbox"/> Iowa                 | <input type="checkbox"/> Ohio                  |   |
| <input type="checkbox"/> Kansas               | <input checked="" type="checkbox"/> Oklahoma   |   |
| <input type="checkbox"/> Kentucky             | <input type="checkbox"/> Oregon                |   |
| <input checked="" type="checkbox"/> Louisiana | <input type="checkbox"/> Pennsylvania          |   |
| <input type="checkbox"/> Maine                | <input type="checkbox"/> Rhode Island          |   |

**All US Territories and Outlying Areas** (Selecting this box is equal to checking all boxes below)

- |   |  |
|---|--|
| <input type="checkbox"/> American Samoa                 | <input type="checkbox"/> Northern Marina Islands |
| <input type="checkbox"/> Federated States of Micronesia | <input type="checkbox"/> Puerto Rico             |
| <input type="checkbox"/> Guam                           | <input type="checkbox"/> U.S. Virgin Islands     |
| <input type="checkbox"/> Midway Islands                 |  |

◆ **Minority** **and Women**

**Business Enterprise (MWBE) and (HUB) Participation**

- It is the policy of some entities participating in NCPA to involve minority and women business enterprises (MWBE) and historically underutilized businesses (HUB) in the purchase of goods and services. Respondents shall indicate below whether or not they are an M/WBE or HUB certified.
  - **Minority / Women Business Enterprise**
    - Respondent Certifies that this firm is a M/WBE
  - **Historically Underutilized Business**
    - Respondent Certifies that this firm is a HUB

◆ **Residency**

- Responding Company's principal place of business is in the city of **Dallas**, State of **Texas**

◆ **Felony Conviction Notice**

- Please Check Applicable Box;
  - A publically held corporation; therefore, this reporting requirement is not applicable.
  - Is not owned or operated by anyone who has been convicted of a felony.
  - Is owned or operated by the following individual(s) who has/have been convicted of a felony
- If the 3<sup>rd</sup> box is checked, a detailed explanation of the names and convictions must be attached.

◆ **Distribution Channel**

- Which best describes your company's position in the distribution channel:

<input type="checkbox"/> Manufacturer Direct	<input type="checkbox"/> Certified education/government reseller
<input type="checkbox"/> Authorized Distributor	<input type="checkbox"/> Manufacturer marketing through reseller
<input checked="" type="checkbox"/> Value-added reseller	<input checked="" type="checkbox"/> Other: <b>Service Provider</b>

◆ **Processing Information**

- Provide company contact information for the following:
  - **Sales Reports / Accounts Payable**
    - Contact Person: **Lorraine Vuong**
    - Title: **Cooperative Contract Coordinator**
    - Company: **TDIndustries, Inc.**
    - Address: **9525 Derrington Road**
    - City: **Houston** State: **Texas** Zip: **77064**
    - Phone: **713.996.2437** Email: **lorraine.vuong@tdindustries.com**



- Purchase Orders
  - Contact Person: Lorraine Vuong
  - Title: Cooperative Contract Coordinator
  - Company: TDIndustries, Inc.
  - Address: 9525 Derrington Road
  - City: Houston State: Texas Zip: 77064
  - Phone: 713.996.2437 Email: lorraine.vuong@tdindustries.com
- Sales and Marketing
  - Contact Person: Lorraine Vuong
  - Title: Cooperative Contract Coordinator
  - Company: TDIndustries, Inc.
  - Address: 9525 Derrington Road
  - City: Houston State: Texas Zip: 77064
  - Phone: 713.996.2437 Email: lorraine.vuong@tdindustries.com

◆ Pricing Information

- In addition to the current typical unit pricing furnished herein, the Vendor agrees to offer all future product introductions at prices that are proportionate to Contract Pricing.
  - If answer is no, attach a statement detailing how pricing for NCPA participants would be calculated for future product introductions.
    - Yes       No
- Pricing submitted includes the required NCPA administrative fee. The NCPA fee is calculated based on the invoice price to the customer.
  - Yes       No
- Vendor will provide additional discounts for purchase of a guaranteed quantity.
  - Yes       No

# VENDOR PROFILE

## 1. Company's official registered name.

TDIndustries, Inc.

## 2. Brief history of your company, including the year it was established.

TDIndustries - A Partnership of the Spirit

TD is a company established in 1946 and supports facilities Customers with a suite of life-cycle services including facility management, HVAC, electrical, plumbing, building controls, and fire life safety. The facilities management division of TD began supporting Customers in 1997 and over the past 30 years has supported Clients like American Airlines, Houston Convention Center, Blue Cross Blue Shield, and the City of Houston just to name a few. The current portfolio of facilities extends more than 40 million sf and 300 personnel. The services our Facilities business provides to Customers includes:

- i. **Complete Facility Management Services** - Under this service TD supports the Customer by providing all facility related services by self-performing facility maintenance and operations while outsourcing non-core businesses like housekeeping and landscaping. Examples of Customers we support this way include Austin Regional Clinic and the City of Houston.
- ii. **Facility Operation and Maintenance Services** - This service supports our Clients with full building operation and maintenance services while the Client supports the non-core services like Housekeeping. Examples of Clients we support with this service include American Airlines and the Denton Independent School District.
- iii. **Facility Maintenance** - Under this service model TD provides all facility maintenance staffing for the Client working under their direction. An example of a Client we serve with this service is Blue Cross Blue Shield.
- iv. **Facility Consulting** - TD supports our Clients by providing strategic consulting services which can include facility assessments, capital planning, operational performance reviews. An example of a Client we service with consulting services include Baylor University.
- v. **Life Cycle Solutions** - TD's uniqueness as a life cycle facilities service provider allows us to support our Customers beyond our facilities offerings. From construction to on demand service and repair TD's core business focuses around your facilities.

TDIndustries customers and employees work to fulfill our mission: We are committed to providing outstanding career opportunities by exceeding our customers' expectations through continuous aggressive improvement.

In-House Capabilities and Services – Our goal is to help you make the most of your investment in a facility. TDIndustries capably provides self-performed construction, installation, service and operations for the following systems that serve Government Entities existing facilities or ground-up construction projects.

- » Facilities Maintenance and Operations / Facilities Management Services
- » Energy Savings Performance and Management Solutions
- » Building Automation Systems / Systems Integration Services
- » Heating, Ventilation and Air Conditioning
- » Plumbing / Electrical / Refrigeration
- » Process and High Purity Piping
- » Life Safety Systems
- » Site-based Facilities Management Services

We believe that having more in-house capabilities than our traditional competitors adds tremendous benefit to Government Entities.

#### 4. Corporate office location

13850 Diplomat Drive, Dallas, TX 75234

#### 5. List number of employees either nationally or regionally (if your response is not all states) with breakdown of direct sales, sales support, service technicians, engineering support and administration.

<b>Austin</b>		<b>Fort Worth</b>		<b>Richardson</b>	
Executive Management	2	Executive Management	4	Executive Management	1
Engineering & Professional	46	Engineering & Professional	49	Engineering & Professional	27
Technical	6	Technical	6	Technical	0
Sales	4	Sales	6	Sales	
Clerical - Administrative	11	Clerical - Administrative	11	Clerical - Administrative	5
Production & Field	103	Production & Field	173	Production & Field	86
<b>Total</b>	<b>172</b>	<b>Total</b>	<b>249</b>	<b>Total</b>	<b>119</b>
<b>Dallas</b>		<b>Houston</b>		<b>San Antonio</b>	
Executive Management	21	Executive Management	6	Executive Management	2
Engineering & Professional	243	Engineering & Professional	75	Engineering & Professional	54
Technical	57	Technical	12	Technical	3
Sales	16	Sales	9	Sales	7
Clerical - Administrative	85	Clerical - Administrative	21	Clerical - Administrative	15
Production & Field	654	Production & Field	232	Production & Field	197
<b>Total</b>	<b>1076</b>	<b>Total</b>	<b>355</b>	<b>Total</b>	<b>278</b>
<b>Denver</b>		<b>Phoenix</b>		<b>West Texas</b>	
Executive Management	0	Executive Management	5	Executive Management	0
Engineering & Professional	10	Engineering & Professional	51	Engineering & Professional	7
Technical	1	Technical	7	Technical	1
Sales	0	Sales	7	Sales	4
Clerical - Administrative	1	Clerical - Administrative	17	Clerical - Administrative	2
Production & Field	3	Production & Field	201	Production & Field	32
<b>Total</b>	<b>15</b>	<b>Total</b>	<b>288</b>	<b>Total</b>	<b>46</b>

#### 6. List the number and location of offices, or service centers for all states being offered in solicitation.

TD provides services out of the following 12 office locations.

- » Dallas, TX
- » Fort Worth, TX
- » Richardson, TX
- » Lubbock, TX
- » San Antonio, TX
- » Austin, TX
- » Houston, TX
- » Phoenix, AZ
- » Tucson, AZ
- » Denver, CO
- » Midland, TX
- » Amarillo, TX

*Additionally, list the names of key contacts at each location with title, address, phone and e-mail address.*



**Brian Lillard**

Vice President, Dallas  
Years of Experience: 32  
Phone: 972-207-5856  
Email: Brian.Lillard@tdindustries.com



**Nate Butler**

Senior Business Development Manager  
Years of Experience: 21  
Phone: 972-888-9584  
Email: Nate.Butler@tdindustries.com



**Mic Sternard**

Senior Business Development Manager  
Years of Experience: 7  
Phone: 480.234.4270  
Email: Mic.Sternard@tdindustries.com

*7. Please provide contact information for the person(s) who will be responsible for the following areas, including resumes:*

*a. Sales*

*b. Sales Support*

*c. Marketing*

*d. Financial Reporting*

*e. Executive Support*

Sales:

Lorraine Vuong and TD Partners - Cooperative Contract Coordinator  
Lorraine.Vuong@TDIndustries.com  
713-996-2437

Sales Support:

Lorraine Vuong - Cooperative Contract Coordinator  
Lorraine.Vuong@TDIndustries.com  
713-996-2437

Marketing:

Lorraine Vuong and TD Marketing Team - Cooperative Contract Coordinator  
Lorraine.Vuong@TDIndustries.com  
713-996-2437

Financial Reporting:

Lorraine Vuong - Cooperative Contract Coordinator  
Lorraine.Vuong@TDIndustries.com  
713-996-2437

Executive Support:

Brian Lillard  
Brian.Lillard@tdindustries.com  
972-207-5856

TDIndustries provides facilities maintenance and services including plumbing, HVAC and electrical maintenance, installation, renovation and preventive maintenance service and repair from twelve offices. We have nine offices in Texas: Dallas; Houston, Austin, San Antonio, Fort Worth, Lubbock, Midland, Amarillo and Richardson. We also serve the state of Arizona, with offices in the Phoenix Metro area and Tucson as well as Colorado with an office in Denver.

Please see the following page for Lorraine's resume.





## LORRAINE VUONG, COOPERATIVE CONTRACTS COORDINATOR

Lorraine is TDIndustries' dedicated liaison with cooperative purchasing networks. Her role is to navigate the administrative and legal needs of both NCPA and Region 14 to help ensure that TD is delivering service excellence. Lorraine is completely dedicated to this type of business and has the experience and skill to coordinate and facilitate the execution of cooperative contracts.

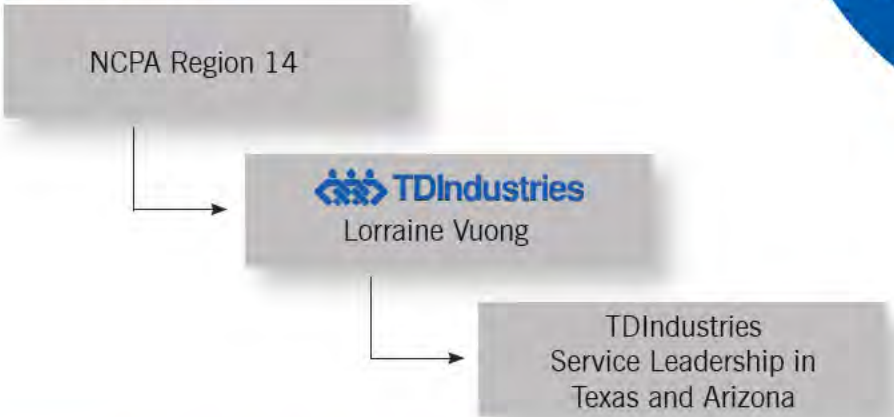
### Lorraine's Experience

Years of Experience: 15  
Education: Accounting Manager, Eldorado Business School  
Relevant Training: TASBO Procurement Courses  
COOP Experience:

- » NCPA
- » OMNIA Partners
- » GSA
- » TXMAS
- » BuyBoard
- » PACE
- » 1 GPA

**NCPA and Region 14 will have a single Point of Contact within TDIndustries, Lorraine Vuong. She will disseminate information and coordinate with the appropriate parties within TDIndustries.**

### Flow of Information



### 8. Define your standard terms of payment.

Net 30.

### 9. Who is your competition in the public marketplace?

We are among the top 60 facilities services contractors in the United States and among the best in the Southwest. We consider the following as our competitors in our major markets:

- » Aramark
- » Sodexo
- » ABM
- » JLL
- » Compass
- » CBRE
- » Kitchell





### *12. What is your strategy to increase market share in the public space?*

TDIndustries will steadily build market share by generating new, high quality leads through the strategic leveraging of tradeshow, marketing campaigns, and networking events. These leads will be appraised and the highest valued ones will be pursued with the full force of our marketing and sales teams. Our performance on these new and current projects in the market will lend to better leads and more references which in turn will increase our volume and value of opportunities and leads.

### *13. What differentiates your company from your competitors?*

What makes TDIndustries stand out from our competitors is our in-house capabilities. We have the ability to perform Design/Build improvements with Government Entities to reduce utility and operating costs on both sides of the utility meter. The majority of the trade contracting work is performed by TD Partners, eliminating markup on trade subcontractor markup - providing unmatched value per dollar invested.

TDIndustries is wholly owned by employees and all employees have the ability to own stock. More than 70% of our employees own stock. Employees with an ownership stake have a greater incentive to provide value to customers and keep them with TD. We do not take shortcuts or take a short term view of our relationships with our customers. We thrive because our customers see this value and know that TD is the best place in the market to find it.

### *14. Briefly summarize your company's Quality Control/Quality Assurance program.*

TD's Quality Assurance Plan represents a systematic procedure for execution and contract compliance with plans and specifications of work on all TDIndustries' projects. It implements defect preventions, quality measurement and recognition processes that will support the accomplishment of any project mission.

On any TDIndustries project, quality comes second only to safety. This plan maps out how that mission will be accomplished with clear communication between team members. This communication will be set from the onset of the project by identifying the expectations of each party and it will continue through the closeout of the project. This plan will also spell out the meeting process for the project as well as the inspection and documentation process of all parts of this project.

This plan is a living document that will mold itself to the project requirements and will also adjust to any changing of the project.

15. Provide information regarding whether your firm, either presently or in the past, has been involved in any litigation, bankruptcy, or reorganization.

TDIndustries Legal Statement:

“The Company is a party to a number of legal proceedings arising in the ordinary course of business. In the opinion of management, the resolution of these proceedings will not have a material adverse effect on the financial position or results of operations of the Company.”

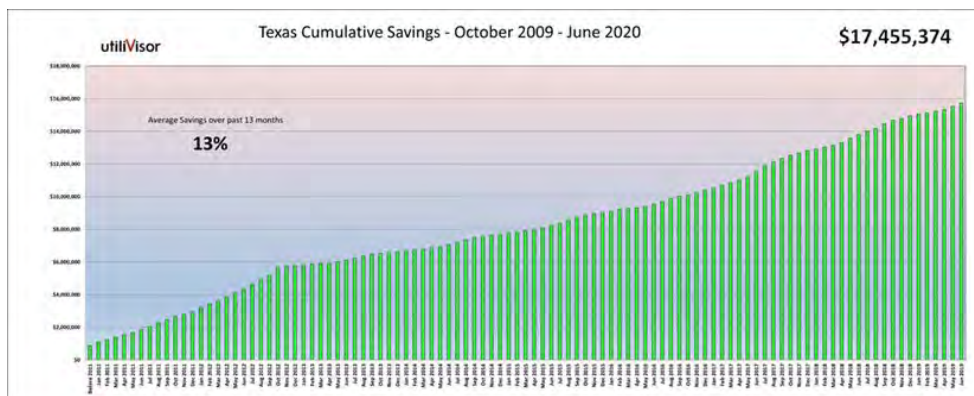
*Sheri L. Tillman*

Sheri L. Tillman  
Corporate Counsel  
TDIndustries | www.tdindustries.com  
Office 972-888-6844 | Cell 972-375-3603

16. Provide evidence of your company's ability to continuously lower the customer's costs. Provide examples of any documented cost reduction results that your company has engaged in with your customers.

Energy Savings Performance Contracting (ESPC) Process and Experience TDIndustries has been in the energy/water savings business for more than 15 years. We are distinguished from many of our competitors by the fact that we self-perform most of the work and utilize as few sub-contractors as is feasible thus avoiding the multiple layers of profit margins you will see from our competitors. TDIndustries can provide the customer with the full range of ESPC services through a turnkey project offering, where TDIndustries personnel perform all key technical, management, and financial functions, rather than consultants, subcontractors, or partners. This allows for an efficient, cost-effective, and seamless project delivery starting with the detailed energy audit and continuing throughout the ESPC term. It also means that the customer will enjoy streamlined communications with their energy partner through a single point of contact and a single point of responsibility for project performance, with no “finger pointing.” The following brief descriptions highlight the ESPC services TDIndustries will provide to the customer as the project progresses through its phases:

1. Energy auditing and facility assessment
  - a. Preliminary Audit - Expert modeling and analysis of baseline energy usage and savings
  - b. Detailed Energy Audit - Project development and economic analysis
2. In-house design engineering and specification
3. Construction project management
  - a. Procurement of materials and trade labor
  - b. Safety coordination by our in-house certified safety professional and OSHA authorized trainer
4. Ongoing Commissioning - ex. utiliVisor, Clockworks
5. Monitoring Base Commissioning - ex. utiliVisor, Clockworks
6. Ongoing Maintenance and Support Services
7. Guaranteed Savings Performance Monitoring and Verification
  - a. Performance guarantee backed by a history of financial strength, organizational longevity, and stability
8. Facility staff and occupant training
9. Financing procurement support, as well as identifying and securing all available grants, rebates, and incentives available to offset project costs



## PRODUCTS

### *17. What is the reputation of your company's products in the public marketplace?*

As a service and maintenance contractor, we do not directly provide products. To see the reputation of our services, please see our response to question 45.

### *18. What equipment/system support documents will your company provide?*

Installation instructions, operation and maintenance manuals, and the manufacturer's recommendations for preventative maintenance.

### *19. Identify the process of receiving a purchase order to the ordering of equipment.*

When a customer purchase order for equipment is received, it is assigned to a construction project manager who reviews the agreement with our sales department and the customer in a kickoff / requirements meeting. The service project manager assigns the appropriate lead technician and together they review the contract, terms and conditions with the assigned customer care representative in the TDIndustries customer care center. The lead technician and customer care center then schedule the site visit to review project conditions and make appropriate internal planning and site access notes. The project is then assigned to a resource in our engineering and project coordination department to begin the design, MISOP and construction planning processes.

### *20. Describe your company's shipping schedule notification procedures.*

Our shipping schedule is a live document. It is constantly automatically updated.

Examples:

- » When a customer updates their delivery needs, the delivery schedule changes.
- » When a work order is created, a delivery is scheduled.
- » When an order is placed on hold, the delivery is pushed out. The product is still built on the original schedule and upon completion is stored in finished goods inventory.

### *21. Describe how your company deals with shipping delays. How do you notify your customer of delays?*

Daily progress meetings are held. The meetings focus only on the progress of the orders scheduled to be complete in the next four days. With information from the daily progress meeting, we are able to and try to provide our Customer a three day notice of any late deliveries. The only exceptions would be for orders placed with less than a three day lead time.

### *22. Provide your shipping schedule reporting form. How many times do you update?*

Our shipping schedule is a live document. It is automatically updated on a consistent basis.

Please see an example delivery schedule on the following page.

# Delivery Schedule

Business Unit	Delivery Due Date	Completion Date	Work Order	Package #	Work Type	Rush	Estd Wt (lbs)	Packing Status	Description	Shipping Instructions	Project Num
CTBU South Major Proj	07/16/2020	07/16/2020	M-19680-A-281	ACED-63B	Round	No	585.4	Complete	L-13-OA unlined rnd		B196803034
Dallas Special Projects	07/17/2020	07/17/2020	M-183A9-A-067	CEDR2-38B	Round	No	224.2	Partial	Highlighted Drawing (BLUE) 2A-LP SA unlined rnd		B183003N01
Dallas Special Projects	07/17/2020	07/17/2020	M-183A9-A-069	CEDR2-38D	Round	No		Complete	Highlighted Drawing (BLUE) 2A-MP SA unlined rnd		B183003N01
Dallas Special Projects	07/17/2020	07/17/2020	M-183A9-A-071	CEDR2-38F	Round	No	153.6	Partial	Highlighted Drawing (BLUE) 2A-RA unlined rnd		B183003N01
Dallas Special Projects	07/17/2020	07/17/2020	M-183A9-A-076	CEDR2-39A	Rectangle	No		Complete	misc. lp unlined rect & 16ga shop angle		B183003N01
Dallas Special Projects	07/17/2020	07/17/2020	M-183A9-A-078	CEDR2-40	Round	No	223.1	Complete	2B 6in spiral pipe		B183003N01
Dallas Special Projects	07/17/2020	07/17/2020	M-27213-A-021	BADE-12	Round	No		Complete	6-14in stamped rnd 90's		B272133140
Dallas Special Projects	07/15/2020	07/15/2020	M-27213-A-019	BADE-10B	Round	No	1412.8	Partial	pg.2 lp unlined rnd		B272133140
FWCG	07/17/2020	07/17/2020	M-27070-A-019	LSFW-8D	Round Lined	No	5356.6	Not Packed	RTU 22-8-3-4-5 lp sa 1-1/2in lined rnd paintgrip W/Duraflange rings Exposed section mount taps		B270703078
FWCG	07/17/2020	07/17/2020	M-27070-A-020	LSFW-8E	Round Lined	No	472.0	Not Packed	RTU 22-8-3-4-5 lp sa 1-in lined rnd paintgrip Exposed section mount taps		B270703078
FWCG	07/17/2020	07/17/2020	M-27070-A-021	LSFW-8F	Round	No	701.1	Not Packed	RTU 22-8-3-4-5 lp sa unlined rnd paintgrip W/Duraflange rings Exposed section mount taps		B270703078
FWCG	07/17/2020	07/17/2020	M-27070-A-046	LSFW-16	Round Lined	No	100.4	Not Packed	RTU-18-lpsa 1.5in lined round paintgrip exposed missing #157 spiral		B270703078
FWCG	07/17/2020	07/17/2020	M-27070-A-047	LSFW-17	Round Lined	No	130.3	Not Packed	RTU-10-lpsa 1.5in lined round paintgrip exposed missing #185 spiral		B270703078



Business Unit	Delivery Due Date	Completion Date	Work Order	Package #	Work Type	Rush	Estd Wt (lbs)	Packing Status	Description	Shipping Instructions	Project Num
FWCG	07/13/2020	07/13/2020	M-27070-A-014	LSFW-7B	Round Lined	No	749.0	Not Packed	LIVING SPACES RTU 2,16,21,9,17_lp 1in lined round section mount tap	PALLATIZE	B270703078
FWCG	07/13/2020	07/13/2020	M-27070-A-015	LSFW-7C	Round Lined	No	9004.2	Partial	LIVING SPACES RTU 2,16,21,9,17_lp constant volume lined round section mount taps	PALLATIZE	B270703078
FWCG	07/13/2020	07/20/2020	M-19650-A-018	ROAS-9	Weld Rect	No	1729.9	Partial	Roof Curb Drops Section 6 exposed stainless 304 16ga welded rect		B196503104
FWCG	07/13/2020	07/13/2020	M-19437-A-012	DIAM-5C	Round	No	2165.2	Partial	RTU-80, 81, 85, EF 3, 5_RA and CVS unlined round Section mount taps	Pallatize wrap individual ends	B194373078
FWCG	07/13/2020	07/13/2020	M-19437-A-013	DIAM-5D	Round	No	50.4	Partial	RTU-80, 81, 85, EF 3, 5_EXH unlined round Section mount taps	Pallatize wrap individual ends	B194373078
Major Projects	07/17/2020	07/17/2020	M-194A4-A-117	GPM2TI-35D	Round	No	2493.0	Partial	Level#7- b&E TI -lp unlined round section mount taps exposed sa		B194473N01
Major Projects	07/15/2020	07/15/2020	M-19447-A-303	JPM2FG-308B	Round Lined	No	58.6	Partial	Lv1 Area B exposed lined rnd pa		B194473018
Major Projects	07/14/2020	07/14/2020	M-27212-S-001	THA-1	Other	No		Not Packed	HOT SLEEVE ORDER		B272123067

Date OnSite between 7/13/2020 and 7/17/2020

Business Unit(s) in (12000 - Building Systems Integration, 18000 - Facilities O & M, 20000 - TDMANUFACTURING, 40000 - Multifamily, 50000 - Washington DC, 60000 - Houston Construction, 60600 - Houston Special Projects, 70500 - Corpus Christi, 70600 - Valley, 70700 - CTBU North Major Proj, 70750 - Austin Service, 70760 - CTBU North Spec Proj, 70800 - CTBU South Major Proj, 70860 - CTBU South Spec Proj, 80000 - Phoenix Construction, 85200 - Major Projects, 85400 - FWCG, 85600 - Dallas Special Projects, 85800 - Technology, 90000 - ADMIN (OVERALL))

Project Number Like (%)

### *23. How many products do you stock? Where?*

For our facilities customers we stock the required quantity of supplies and materials on customer's sites. We hold strategic sourcing agreements with key suppliers that allow us to quickly restock supplies and parts as needed. Each of our local offices' service departments has a stock (including truck stock) of all required consumables, belts, filters, refrigerants (each location has a recycling/recovery station) and other HVAC Service related components. We also hold stocks of critical replacement parts for commercial refrigeration and parts reserves for specific Customers where expedited replacement is key to their processes. We do not typically stock complete HVAC units as we have supplier/manufacturer relationships in all locations for rapid replacement requirements.

### *24. What is your percentage of on-time delivery at each manufacturing plant?*

TD Facilities customers participate in our world class supplier agreements where on time delivery is guaranteed for critical parts and supplies. In instances where TD is responsible for the manufacturing and fabrication of equipment. TD requires a detailed project plan is required from the project manager. For projects that meet this requirement with no changes/change orders, etc. our on-time delivery rate is 98%. About 25% of the Manufacturing time is spent dealing with "Hot Calls", instances where there is a last minute project change order, additional materials required, parts damaged in shipment, etc. For those "Hot Calls", our on-time delivery rate is 95%.

Having an onsite Facilities Services team, TD is able to respond to work order requests in as little as a 4-hour window. Our response time is tiered based on the critical life safety needs of the request. This is an advantage of having TD as your onsite Facilities Services team.

### *25. Describe any direct order entry system or capabilities your organization has such as internet capabilities.*

Our facilities technicians are provided with hand held devices which allow them to receive and process work orders in real time. Our system is customer friendly letting the user enter work requests from any internet enabled device. Work is then managed and processed using a predetermined priority system. Performance is then measured via a contractually required reporting system.

### *26. Are all security products UL listed and in compliance with all applicable codes in all states?*

Yes.

### *27. If your product is defective, what is the replacement process and turnaround?*

All equipment warranties on all products installed by TD Industries are captured in a master database. Should a warranty claim arise, the database provides the feedback loop to our project managers to initiate the warranty claim with the appropriate manufacturer, dealer or distributor. Turnaround time is dependent on the supplier, but TD Industries will leverage our size and buying power to help suppliers prioritize our replacement delivery and if necessary, we will provide temporary heating/cooling if the problem leaves our Customer without comfort in the meantime.

A benefit to having TD onsite for Facilities Services is that we can expedite the warranty turnaround process. We can manage the process and coordinate with vendors to fix what is broken.



*28. What is the capability of your company to respond to emergency/rush orders?*

Facilities Management teams are on call 24/7/365 but are also supported by more than 290 highly specialized technicians who are committed to getting your system up and running, with minimal disruption, as soon as humanly possible. Not only are our technicians specially trained, our Customer Service Group representatives are cross-trained in all disciplines so they can send the right team out to correct your problem. Whether it is equipment change-out, start up or shut downs, TDIndustries is there for you.

*29. State whether your company provides a quality guarantee on your products. If so, please describe.*

TD provides a one year warranty. A warranty letter can be provided upon request.

*30. Describe your procedures to monitor the quality of your products.*

TD analyzes the Quality of the vendors we use as well the quality of service we perform through various methods. Equipment vendors will be evaluated primarily based on prior service and deliverability. Secondly they will be evaluated on their ability to provide the specified equipment in compliance with the plans and specifications.

Materials vendors will be evaluated primarily based on prior service and deliverability. Secondly they will be evaluated on their ability to provide the specified materials in compliance with the plans and specifications. Due to frequency of deliveries for commodity items, these vendors must prove compliance in advance with safety policies and approval.

*31. Do you offer extended parts and labor warranties? If yes, state length of warranty.*

Yes, if the Customer is interested in an extended warranty option, we will provide a quotation. (Examples: 2-5 years).

*32. Please give examples of state and local agencies where your company has extended labor warranties. Include length of these warranties.*

By having TD as your Facilities Services partner, we extend the life of your assets with providing routine maintenance on all new and existing equipment. Our team can manage any existing or expired warranties on equipment.

*33. What is your standard warranty on replacement parts?*

Typically one year, but could be longer depending on Customer acceptance of extended warranties.

*34. How does your company track warranties and update equipment lists/warranty periods as units or components are replaced?*

All equipment warranties on all products installed by TDIndustries are captured in a master database - New Construction/Retrofit and Service replacements. Should a warranty claim arise, the database provides the feedback loop to our Project Managers to initiate the warranty claim with the appropriate manufacturer, dealer or distributor.

*35. What states would your company not honor pricing on your supplied equipment for this contract, in the event that this contract is made available to all states?*

TDIndustries will not be providing facility maintenance to all states.

## SERVICES

*36. Describe your company's Customer Service Department (hours of operation, number of service centers, parts outlets, number of technicians, etc.) Clarify if the service centers are owned by your company or if they are a network of subcontractors.*

TDIndustries provides preventative maintenance, repair and emergency service 24/7 with more than 300 service technicians. All activities are coordinated by our centralized TDIndustries Customer Service Center, located in our Dallas Headquarters. Our dispatch Center manages the dispatching operations for all service branches after 5pm weekly, and all day on the weekends.

You can contact our Contact Center through a dedicated 800 number, by e-mail, or fax through the following channels:

Toll Free Number: 1-800-864-7717

E-mail: [service@TDIndustries.com](mailto:service@TDIndustries.com)

Fax: (713) 996-2414

Service Technicians (Includes BSI Service Techs and Life Safety Service Techs).

*37. Describe how your company handles after-hours customer service needs indicate your average response time to emergency service calls.*

All emergency calls are considered top priority. The afterhours TDIndustries Call Center Response Team is responsible for assessing the appropriate course of action. If there are questions or concerns, the first point of contact is the TDIndustries Service Manager for that particular trade, and the Customer's designated TDIndustries Customer Care Manager. TDIndustries response time for emergency service calls ranges from two (2) to four (4) hours at the latest.

*38. Discuss your organization's capability and historical flexibility in completing timely service calls and problem resolution.*

Once on the dispatch board, the request can be tracked for how long before it was dispatched, who dispatched the call and to whom and when, when the call was received by the technician's device, accepted and when they were in route to when they arrived on site. The time "on the job site" is tracked until the work completed and the customer representative signs the work ticket. This allows us to keep historical data on our service calls to develop ways to create improvements.

*39. Please describe the quality program(s) within your company which measures your service work.*

Please see the answer to Question 40 above. The historical data of our service calls allow us to develop ways to create improvements.

*40. Describe your call center organization.*

TDIndustries provides preventative maintenance, repair and emergency service 24/7 with more than 300 service technicians. All activities are coordinated by our centralized TDIndustries Customer Service Center, located in our Dallas Headquarters. Our dispatch Center manages the dispatching operations for all service branches after 5pm weekly, and all day on the weekends.

*41. Does your company offer a dedicated, 800 number for all locations to place phone and fax orders? Is the call center available 24 hours/7 days week?*

Yes, you can contact our Contact Center through a dedicated 800 number, by e-mail, or fax through the following channels:

Toll Free Number: 1-800-864-7717

E-mail: [service@TDIndustries.com](mailto:service@TDIndustries.com)

Fax: (713) 996-2414

*42. Describe how service call problems get escalated in emergency situations during and after hours. Who would be responsible in your company for assessing the appropriate course of action to remedy the problem?*

The afterhours TDIndustries Call Center Response Team is responsible for assessing the appropriate course of action. If there are questions or concerns, the first point of contact is the TDIndustries Service Manager for that particular trade, and the Customer's designated TDIndustries Customer Care Manager.

*43. List the steps taken from start to finish in receiving a service call through to completion of repair and invoicing. Include time frames associated with each step.*

Since our Field Technicians are connected to the Service Center via hand-held devices and all Service Calls are scheduled and processed in real time, the time frame associated truly depends on the customer's desired response time. When a Service Call is completed, the Technician will be able to email a work order/invoice to the Customer's attention / to Customer's designated Contact person / Accounts Payable immediately. The Customer will also have access to a Portal, where with a Username / Password, they will be able to access all account activity / work orders / invoices and all other data related to their Agreement / Account.

*44. What technology such as GPS tracking does your company use to track completion of repairs?*

Our service fleet in all locations use hand held PDA's, all trucks have GPS tracking linked to our Central Dispatch Team. When Central Dispatch receives a call from a Client requiring immediate attention, they know where all the Technicians are working, the capabilities / skill level of each Technician and the tools they are carrying in the Service vehicle. This allows Central Dispatch to get to the right person and to the right job in the shortest time allowable. All field generated quotations and resulting invoices are generated in real time and all company financial systems capture the information and status (in progress / completed / incomplete) from each Technician on every Service call or Maintenance Agreement task as it happens.

*45. What is the reputation of your company's service in the public marketplace?*

TDIndustries is one of the premiere mechanical contractors in the southwest United States. Our reputation is well known and we have received numerous accolades including most recently:

- » ABC Safety Excellence Pinnacle Award
- » ABC Eagle Award for Mansfield Wellness Center
- » Multiple TEXO Distinguished Building Awards
- » 2019 Southwest Top Specialty Contractor by ENR
- » No. 32 on ENR's Top 600 Specialty Contractors List (2019)
- » Contractor of the Year (2019), CONTRACTOR Magazine

#### *46. Identify the process of receiving a purchase order to the providing of a service contract.*

When a Customer purchase order for a Maintenance Agreement is received, it is assigned to a Service Project Manager who reviews the Agreement with Sales and the Customer in a kickoff/requirements meeting. The Service Project Manager assigns the appropriate Lead Technician and together they review the contract, terms and conditions with the assigned Customer Care Representative in the TDIndustries Customer Care Center. The Lead Technician and Customer Care Center then schedule the first HVAC Service visit. This process generally takes 5-10 business days depending on Customer availability.

#### *47. Describe your company's startup and system checkout responsibilities*

TDIndustries goal during installations is to have little to no outstanding items on our punch list. Our highly trained start-up technicians help ensure this goal through equipment checklists. As part of our overall start up service, we offer:

- j. Starting up systems and preparing for commissioning
- k. Test and Balance
- l. Performance Certification – After the time of your system's start up, TDIndustries Warranty takes effect.
- m. A seamless transition to life-cycle operation and maintenance service.

#### *48. Describe your company's post-installation and warranty support*

Call center and project manager / account manager stays involved.

#### *49. Describe your company's steps for system analysis.*

Our Facilities Management group can survey the existing systems for condition, efficiency and repair history and create a customized year by year replacement program with our customer to propose guaranteed multi-year fixed-price modernization program methods segregated into categories that include weather related energy, occupant dependent energy, and building operating hour dependent energy, among other categories.

TDIndustries will further evaluate the facility's energy pricing structure to determine, based on the specific load profile, whether the facility is on the most appropriate and cost-justified utility rate schedule. Finally, energy system and facility audits are conducted in which TDIndustries engineers identify potential improvements while in the field, and then analyze them thoroughly for the technical and economic viability.

#### *50. Discuss your company's current computer systems architecture. How do your company's computer system guarantee customers receive consistent service support, HVAC responsibility verification, and management reporting?*

Our field technicians will be connected to the Service Center via hand-held devices and all service calls will be scheduled and processed in real time. The field hand-held devices will be in communication with all of TDIndustries business process systems. Data from field service work orders will be downloaded to these business process systems for invoicing, cost accounting/maintenance record keeping, etc.

The Customer will also have access to a Portal, where with a Username/Password, they will be able to access all account activity/work/invoices and all other data related to their agreement/account.

#### *51. What does your company do to ensure bills are received from service centers within a reasonable time frame and issued to government entities for payment?*

All field generated quotations and resulting invoices are generated in real time and all company financial systems capture the information and status (in progress/completed/incomplete) from each technician on every Service call or Maintenance Agreement task as it happens.

*52. Explain how your company qualifies/certifies its service centers and what types of checks are performed to ensure standards are upheld.*

Each of TDIndustries functional departments, i.e. Facilities Maintenance, Truck-based Service, Construction, MIS, Manufacturing, Administration, Executive Leadership, has permanent standing Quality Steering Team in place. These teams are required to meet monthly to work on specific issues and initiatives within their department and report to TDIndustries Executive Leadership team once a quarter and to the TDIndustries Board of Directors twice annually.

*53. Is warranty coverage dependent on using your start-up procedure?*

No. Extended warranties usually require Manufacturer's start-up/varies by Manufacturer.

*54. Who performs your start-up procedure?*

Each TDIndustries location has a designated Start-up leader. The leader coordinates Start-up processes with TDIndustries Technicians and Manufacturer's personnel as required.

*55. Explain how your company would propose a planned unit replacement program including how units would be identified for replacement and how pricing would be addressed.*

In the case of a customer who needs an ongoing system replacement strategy, our Facilities Management group can survey the existing systems for condition, efficiency and repair history and create a customized year by year replacement program with the customer to propose a guaranteed multi-year fixed-price modernization program methods and segregated into categories that include weather related energy, occupant dependent energy, and building operating hour dependent energy, among other categories. TDIndustries will further evaluate the facility's energy pricing structure to determine, based on the specific load profile, whether the facility is on the most appropriate and cost-justified utility rate schedule. Finally, energy system and facility audits are conducted in which TDIndustries engineers identify potential improvements while in the field, and then analyze them thoroughly for the technical and economic viability.

When calculating energy savings opportunities, it is important to review the project and savings calculations at a macro level and compare against usage patterns of other similar facilities. Our years of experience developing, implementing, and monitoring projects in similar buildings have provided us with substantial benchmarking data for comparison. Realistic savings are the foundation for successful energy efficiency and infrastructure improvement programs. We will perform calculations at both the macro and micro levels in order to ensure we are not double counting savings, ignoring the interactive effects of the performance of several of the measures, or being too conservative with our projections. In these times of shrinking operating budgets, it is imperative that the savings projected actually materialize. This is possible only if both the cost and savings sides of the project ledger are developed with rigorous attention to detail and field-proven technology is selected for long-term performance and durability.

Design Engineering: TDIndustries offers Government Entities a turnkey ESPC expertise. We utilize a "close-loop" management strategy, which ensures consistency and a high degree of quality control throughout the project life cycle and is essential to providing the Government Entity with an integrated best value solution. Our design engineering process further emphasizes minimization of costs while providing quality designs. The same engineers who participate in the audits complete the project design, create bid specifications, assist with construction management, and consult on operations. This approach allows for a smooth transition from the development stage through the operations stage. Moreover, these engineers are motivated to ensure that each energy conservation measure (ECM) is implemented successfully, rather than simply passing the job along to another department as the ECM progresses from design to construction to operations. TDIndustries' s engineering procedures ensure that work is completed accurately in accordance with generally accepted engineering practices and all applicable regulations.

*56. Describe what project scheduling tools your company use to track projects during construction.*

ProCore, Microsoft Office 365, Dynamics, field visits, and field feedback.

*57. Describe how your company handles site development and project permitting process.*

Project Manager gets building permit from the General Contractor. They fill out their portion of a permit application and give to Department Administrator, and he/she pulls the permits from that information for mechanical and plumbing. Once the permit is obtained it is sent to the project manager and superintendent for the particular project and then as inspections are needed, Debbie or one of the department admins request the inspection either online for the City of Houston or by telephone for other municipalities. Copies of the permits are kept in a permit folder on our computerized bulletin board until the project is complete. Once the permits are closed out the final permits are placed in the Project Management folder online.

*58. Describe your company's construction management plan.*

TD's construction management plan is to be used as a guide to assist in tracking the process, progress and consistency on carrying out a construction project from the beginning of a substantial "Lead" to the turning over control of the site to the Owner.

The information contained in our plan is primarily directed to Major Projects and Special Projects Business Units in the various branches. The processes may however vary in areas such as Process Solutions, Service Departments, etc. It is laid out in the sequence stated below:

- » Preconstruction
- » Project Setup
- » Planning and Finances
- » Quality and Production
- » Closeout

*59. What is your standard warranty on installation?*

One year on workmanship.

*60. Do you differentiate in your company's standard warranty if financing is part of the contract? If so, please describe.*

We will try to match the length of an extended parts and labor warranty to the financing term if the customer requires this type of arrangement.

*61. State whether your company provides a quality guarantee on your service. If so, please describe.*

There have been instances where we have provided warranties that were tied to system performance, efficiency and energy/operational cost reductions. These warranties were over and above whatever parts and labor warranties provided.

*62. What states would your company not honor pricing on services for this contract, in the event that this contract is made available to all states?*

TDIndustries will not be providing services to all states. Only Texas, Arizona, Louisiana, Oklahoma, New Mexico, Colorado, Nevada, Utah and Arkansas.



## SAFETY

63. Describe your company's safety program during service/repair work

Please see the QR code below for TD's safety program.

64. Describe your company's safety program during construction.

Please see the QR code below for TD's safety program.



65. Indicate number of lost hours or other benchmarks to verify your company's effectiveness of their safety record.

	EMR	LTIR	TRIR	TOTAL HOURS WORKED
2020	.72	.1	1.2	5,758,180
2019	.63	.03	1.4	6,661,989
2018	.77	.3	2.3	6,136,430
2017	.7	.2	2	5,686,471
2016	.73	.2	2.3	4,671,298

66. What reporting mechanism does your company provided to the customer upon completion of any project?

Within construction, a letter of substantial completion or one of completion is furnished. From TD's position, we issue a warranty letter, O & M's, owner training, and we request for final payment.

## MARKETING/SALES

67. Detail how your organization plans to market this contract within the first 90 days of the award date. This should include, but not be limited to:

- A co-branded press release within first 30 days
- Announcement of award through any applicable social media sites
- Direct mail campaigns
- Co-branded collateral pieces



- e. *Advertisement of contract in regional or national publications*
- f. *Participation in trade shows*
- g. *Dedicated NCPA and Region 14 ESC internet web-based homepage with:*
  - i. *NCPA and Region 14 ESC Logo*
  - ii. *Link to NCPA and Region 14 ESC website*
  - iii. *Summary of contract and services offered*
  - iv. *Due Diligence Documents including; copy of solicitation, copy of contract and any*
  - v. *amendments, marketing materials*

## **FIRST 30 DAYS**

- » In our first 30 days of being awarded, TD's Cooperative Contract Coordinator will notify all Service Sales Team Leaders that TD has been awarded a new NCPA contract.
- » TDIndustries marketing will announce to all TD partners that TD has been awarded for a new contract with NCPA and will link to NCPA's microsite through the announcement. They will be informed of the new contract number and what TD services this contract covers.
- » Marketing will work with NCPA marketing to promptly update our landing page for our new contract.

## **60 DAYS**

- » Modify existing brochures/marketing materials to incorporate the new contract in our cooperative capabilities.
- » TDIndustries will work with NCPA to strategize an NCPA roadshow in each of our TX and AZ locations. In these roadshow meetings, the market opportunity, customer profiles, contract terms, and business processes will all be reviewed so that all TD partners get the message and are prepared to seize the opportunities. NCPA will be asked to participate in those meetings to provide answers to questions.
- » Plan a meeting with TD Service Sales Team and NCPA Development Manager and Regional Managers to strategize a sales plan with all that NCPA has to offer.

## **90 DAYS**

- » We will participate in joint marketing activities that NCPA determines that TDIndustries should participate in, co-host, etc....
- » We will participate in trade shows and exhibitions where the government entities are likely to participate.

We will continuously train and have roundtable discussions with our TD partners to make certain they understand the program rules to better utilize our contracts and be compliant.

***In person events and meetings are contingent on COVID-19 and related policies.***

***68. Describe how your company will demonstrate the benefits of this contract to eligible entities if awarded.***

When holding an open house / meeting for existing and prospective Government Entity Customers, we will illustrate how obtaining our services through cooperative purchasing will provide the most value to their project / service needs. This can be illustrated by demonstrating the cost of procuring services via the traditional time and resource consuming route vs. obtaining our services and acquiring significant savings of both time and money.

***69. Explain how your company plans to market this agreement to existing government customers.***

Please see the response to question 67.

*70. Provide a detailed 90-day plan describing how the contract will be implemented within your company.*

Please see the response to question 67.

*71. Describe how you intend on train your national and/or regional sales force on the Region 14 ESC agreement.*

Our first step will be in a seminar/conference in our local offices where Lorraine Vuong will fully describe the NCPA contract offering to all Sales and Operations personnel. During this meeting, the Market Opportunity, Customer Profiles, Contract Terms, Business Processes will all be reviewed so that all hands get the message and are prepared to seize the opportunity.

We will continuously train and retrain our Partners to make certain they understand the program rules, reward those that adopt the strategies and produce the results. Our intention is to arrange a competition between Departments and Locations, with rewards commensurate with their levels of production of work under both TDIndustries existing Energy Services contract and the HVAC Equipment, Installation, Service, and Related Items contract.

*72. Acknowledge that your organization agrees to provide its company logo(s) to Region 14 ESC and agrees to provide permission for reproduction of such logo in marketing communications and promotions.*

TDIndustries agrees to provide our company logo to Region 14 ESC and agrees to provide permission for reproduction of such logo in marketing communications and promotions.

TDIndustries has been most successful in our implementation with NCPA. With our current processes and procedures producing such success, our other cooperative contracts have been modified to model similar processes and procedures.

Since all of our NCPA projects are channeled through one contact (Lorraine Vuong), we have the ability track the progress and report sales for all projects in a timely manner. Due to the compliance review program, we recently created internal estimate sheets that are based off of our current contract terms and conditions. This allows our estimators and service team to be sure they do not exceed the contract established labor rates, margins and to be sure they include equipment discounts. This new process has been quite successful in allowing our customers to feel reassured they are receiving pricing that is better than or equal to our established NCPA rates.

*75. Describe the capacity of your company to report monthly sales through this agreement.*

Lorraine Vuong, our Government Contract and Compliance Manager will be responsible for keeping track of requested proposal numbers and reporting successful sales in the month they are complete by communicating with all business units at all TD locations.

*76. Describe the capacity of your company to provide management reports, i.e. consolidated billing by location, time and attendance reports, etc. for each eligible agency.*

Lorraine Vuong will also be responsible for facilitating management reports for all NCPA projects upon request.

*77. Please provide any suggested improvements and alternatives for doing business with your company that will make this arrangement more cost effective for your company and Participating Public Agencies.*

We suggest that billing be done on a monthly basis so that our accounting department can assure fees are appropriately charged to projects before close out.

## **GREEN INITIATIVES**

*We are committed to helping to build a cleaner future! As our business grows, we want to make sure we minimize our impact on the Earth's climate. So we are taking every step we can to implement innovative and responsible environmental practices throughout Region 14 ESC to reduce our carbon footprint, reduce waste, promote energy conservation, ensure efficient computing, and much more. We would like vendors to partner with us in this enterprise. To that effort, we ask respondents to provide their companies environmental policy and/or green initiative.*

*78. Please provide your company's environmental policy and/or green initiative.*

We are committed to helping to build a cleaner future! As our business grows, we want to make sure we minimize our impact on the Earth's climate. So we are taking every step we can to implement innovative and responsible environmental practices throughout Region 14 ESC to reduce our carbon footprint, reduce waste, promote energy conservation, ensure efficient computing, and much more. We would like vendors to partner with us in this enterprise. To that effort, we ask respondents to provide their companies environmental policy and/or green initiative.

TDIndustries believes in doing our part to make the world a greener place. By providing recycling bins at every desk and every trash location, reducing unnecessary printing of documents and eliminating the use of Styrofoam products in our offices, Partners eliminate tons of recyclables from ending up in landfills. Furthermore, we do our part to recycle as much waste as possible on worksites by providing a separate bin for items that can be repurposed or recycled. TDIndustries is also committed to the environment in the projects we work on. We have completed over 50 LEED certified projects and employ over 40 LEED Accredited Professionals.

## VENDOR CERTIFICATIONS (IF APPLICABLE)

79. Provide a copy of all current licenses, registrations and certifications issued by federal, state and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing respondent to perform the covered services including, but not limited to licenses, registrations or certifications. M/WBE, HUB, DVBE, small and disadvantaged business certifications and other diverse business certifications, as well as manufacturer certifications for sales and service must be included if applicable.

## LICENSES

Below is a listing of applicable licenses. Copies of individual licenses will be provided upon request.

### DALLAS:

- » Larry Bartlett-----Plumbing—M-16723
- » Dennis Grissom—AC/Refrigeration/Process Piping—TACLA26339C
- » Stephen Rogers---Electrical –EC-17889

### FORT WORTH:

- » David Hollowell—Plumbing—M-19925
- » Lyn Freeman---- AC/Refrigeration/Process Piping—TACLA17611C
- » Stephen Rogers---Electrical –EC- 17889

### AUSTIN:

- » Weslee Jones----Plumbing ---M-36838
- » John C. McRae---AC/Refrigeration/Process Piping---TACLA27827C
- » Greg Gillespie----Electrical---EC- 26107

### SAN ANTONIO:

- » Louis Menard – Plumbing-- M-42395
- » Billy Wayne Sides -- AC/Refrigeration/Process Piping--TACLA00058529C
- » Greg Gillespie---Electrical--- EC- 26107

### HOUSTON:

- » Alvin Schneider-- Plumbing--M-35508—
- » Mark Gafford-----AC/Refrigeration/Process Piping---TACLA00060764C
- » Stephen Rogers---Electrical—EC-17889

### WEST TEXAS OFFICES: AMARILLO AND LUBBOCK (USING FORT WORTH LICENSES FOR NOW)

- » David Hollowell—Plumbing—M-19925
- » Lyn Freeman---- AC/Refrigeration/Process Piping—TACLA17611C

### COLORADO:

Tony Dixon-- Plumbing—MP-185879

TDOwned-----Plumbing State Contractor---PC-2056 // TDOwned---City Mechanical HVAC—237339 // TDOwned---City Refrigerant A----237340 // TDOwned--- Plumbing Contractor----17500

### ARIZONA:

TDOwned--- ROC246533-C-39 // TDOwned--- ROC246535-C-37 // TDOwned--- ROC264254-C-74 // TDOwned--- ROC323889-CR-11

### FIRE LIFE SAFETY:

- » ACR-3105 Alarm Contractor's Registration -TD Owned
- » ECR-1944 Extinguisher Contractor's Registration- TD Owned
- » SCR-G-1065 Sprinkler Contractor's Registration- TD Owned

# TAB 5 - PRODUCTS AND SERVICES

## TAB 5 CONTENTS:

### PRODUCTS AND SERVICES

# Tab 5 – Products and Services

---

Respondents are requested to provide product forms with detailed description of your product offerings. Provide the minimum information as listed for your product categories for the following classifications of Heavy-duty Transportation Maintenance Equipment Solutions and Related Services. Please provide separately attach unit (product) or turnkey (labor solution) descriptions for the following:

## **Facilities Management Solutions and Related Services**

Responder(s) shall meet or exceed the following general requirements:

### **1. Minimum Respondent(s) Qualifications**

Responder(s) shall be capable of furnishing and delivering, as required, all labor, vehicle(s), and equipment as necessary to provide services requested by NCPA members. Responder(s) shall ensure equipment meets or exceeds industry standards for the type of work being performed at all project sites to continuously and diligently accomplish the work.

#### **A. Experience**

Responder(s) shall possess a minimum of ten (10) concurrent years of documented experience in building and facilities operations and maintenance services, in addition to the development and execution of an ongoing maintenance program. Responder(s) personnel shall possess the required minimum number of years of experience identified herein in the Vendor Profile section of this RFP. Responder(s) shall be experienced in continuous improvement processes.

#### **B. Applicable Laws and Standards**

All work shall be performed to the most recent standards and specifications throughout the contract duration included and stated herein, but not limited to, maintenance practices and specifications, state and local building codes when applicable, agency building codes when applicable, National Electric Code published by the National Fire Protection Association International Building Code, Occupational Safety and Health Administration, all Federal, State, Local and Municipal laws and ordinances as well as all applicable industry codes.

Additionally, all work shall be performed and completed in a thorough, workmanlike manner and in accordance with the latest proven practices of the trade by thoroughly skilled and experienced employees. Proper health and safety measures shall be taken by the Respondent(s) to ensure safety for the public, employees, Respondent(s) employees and subcontractors.

#### **C. Safety**

All safety materials and or devices necessary to perform the work in a safe and orderly manner shall be furnished by the Respondent(s). Safety equipment for Respondent(s) personnel shall include but not be limited to all necessary PPE: i.e., work boots meeting all safety standards, safety glasses, ear plugs, reflective vests, lockout/tagout, etc.

### **2. Computerized Maintenance Management System (CMMS) (Work Order System)**

Computerized Maintenance Management System (CMMS) Requirements: The Respondent shall provide and utilize a non-proprietary web-based computerized maintenance management system (CMMS) to manage and track all maintenance work and provide all requested reports for contract



oversight responsibilities. All preventive maintenance work orders shall be printed, distributed, completed, and closed out by the Respondent.

The CMMS software selected by the Respondent must have the capabilities to scheduling and reporting on preventive and corrective repair and project maintenance work, including scheduled rounds and routine and periodic tasks and maintain histories of scheduled and unscheduled maintenance, repair, labor and parts and materials utilization for each piece of equipment. Maintenance shall include the following:

A. Preventive Maintenance: Preventive maintenance includes inspections, lubrication, tests, adjustments, and corrective maintenance tasks. The Respondent shall control scheduling the interval of preventive maintenance and task functions to be performed by both calendar periods and operating hours (run time) as applicable to each piece of equipment. Preventive maintenance must follow the original manufacturer's recommendations.

B. Predictive Maintenance: The Respondent shall control scheduling for predictive maintenance including but not limited to oil spectrum and vibration analyses as well as fan and pump pulley and shaft alignment.

C. Repair Maintenance: Repair maintenance includes all repair, replacement, and adjustment of equipment in response to conditions discovered during performance of preventive maintenance, equipment breakdown/improper operation, or occupant/occupant complaint. Repair work orders shall be generated as required to respond to problems as they occur. Except in response to occupant complaints or safety requirements, repair work orders shall be scheduled for completion depending on priority, availability of parts, workload, and convenience of occupants. Repair maintenance involving safety considerations or possible damage shall be responded to immediately. Repairs must follow original manufacturer's recommendations.

The CMMS must maintain information regarding the facilities both aggregately as well as by individual facilities. Subcontracted maintenance must be tracked and reported. Inventory levels, costs and utilization must be maintained and reported as well as spare part and critical spare part information.

The CMMS must be nonproprietary, track vendor history, including warranty tracking, delivery, and parts reliability and cost performance.

The Respondent 's CMMS shall produce reports in a labor distribution format sufficient to allow accurate budgeting and charge back for all labor and material usage each department within the agency's managed facility. Labor and material must also be broken out by maintenance, housekeeping, and other functions required for budgeting by the agency. The CMMS must have the capability to capture costs associated with each piece of equipment. Each piece of equipment must be uniquely defined. The CMMS must have provisions for providing a running labor and material cost history for each piece of equipment in a month-to-date, year-to-date, and life-to-date format. These reports are to be made available upon request by the agency and not less than annually.

### **3. Technical Requirements**

In order to perform the work described herein, Responder(s) shall provide all necessary tools, vehicles, equipment.

Respondent(s) shall maintain project sites, storage rooms, shops and mechanical/electrical equipment rooms in a clean and orderly fashion and remove all trash, debris, containers and etc. from the project

sites upon completion of work each day and dispose of materials in accordance with federal and state regulations. Member agency is not responsible for Respondent(s) errors and omissions.

Respondent(s) shall provide trained and qualified personnel to provide all services related to this RFP and shall identify classifications and specialties needed to maintain the contract as required. Classifications identified herein shall establish minimum service requirements. Respondent(s) shall identify within proposal submission all classifications, specialties and hourly rates needed to perform the services herein.

A. Hours of Operation

Agencies may require an on-call person 24-hour a day operation, 365 days a year. Respondent(s) shall describe required hours of operation, days per week, and weeks per year to agencies. Describe shifts for total hours per week. Provide flexible start and end times to avoid OT. Respondent(s) is responsible for scheduling and maintaining required staff on a daily basis in order to meet agency's maintenance needs. Respondent(s) is solely responsible for scheduling workers and subcontractors to ensure compliance with all federal and state wage requirements.

B. Maintenance Program

Respondent(s) shall manage ongoing maintenance program(s) including the performance of service needs determinations, location of resources, work assignments and management of resources. Respondent(s) shall develop a program that illustrates how the maintenance program will be managed based on the requirements described in this RFP. Implementation and setup of a CMMS system may be required by agency. All updates are the responsibility of the Respondent(s). The information loaded onto the system will remain the property of the agency.

C. Facility Maintenance Service Calls

Respondent(s) shall maintain a service log, which shall detail complaints or requests and or the nature of the items contained in the log. The service log shall be made available to agency for review upon request. Respondent(s) shall contact agency to determine priority of each service request. Respondent(s) shall indicate their levels of service call responses for incident/emergency service call, non-routine Maintenance/Non-Emergency Asset Damage Service Call and Routine Maintenance Service Call. It is expected to have a max of 30 minute response for licensed trade personnel. Indicate:

- Response time
- Maximum restoration of service
- After hour response time

D. Facilities Maintenance and Inspection

Respondent(s) shall perform routine maintenance of buildings/facilities and ancillary structures. If agency so chooses, custodians will remain employees of agency or the current subcontractor and their duties will remain. Respondent(s) shall maintain the facilities in accordance with the requirement of the maintenance specifications detailed in the operation and maintenance plans for each facility, equipment, equipment/material warranty provisions, local building codes, and industry best practices. Respondent(s) shall maintain all components of the facilities including building exterior surfaces, sanitary sewer systems, HVAC systems, electrical and plumbing systems, routine maintenance and carpentry of structural items, painting and exterior cleaning of facilities, potable water facilities and auxiliary electrical systems.

E. Rapid Response Demand support services

Respondent(s) can receive Rapid Response Demand work requests by email, phone, radio and/or

verbally. Respondent(s) shall have the ability to handle requests from agency with any or all of the methods of communication. Response expectations shall be immediate (less than an hour) during agency's normal operational hours. Exceptions will be on declared holidays, agency closure or any hours so designated by the agency. Many skills will be necessary to field the various work requests and complete in a high quality, timely fashion.

#### 4. On site staff requirements:

A. Pre-employment/assignment: In accordance with agency's employment policies for new hires, including temporaries and Respondent(s) employees/contractors, the following requirements shall be met at Respondent(s)'s expense:

- Thorough background check including criminal activity
- Verification of licensure and/or certification
- Physical
- Pre-employment drug screens (U/A and Hair Analysis)
- Finger printing

Respondent(s) warrants it shall provide qualified personnel who shall perform in a professional manner. "Professional manner" means the personnel performing shall possess the skill, license(s) and competence consistent with the prevailing business standards within the State of Texas and any other state requirements respondent(s) so chooses to offer their product(s) and service(s).

Respondent(s) shall ensure that the project manager, facility supervisor and members of each crew, speak and write fluently in English. The project manager, facility supervisors, crews, and specialist shall be subject to perform duties within their ability and expertise and as assigned by agency in addition to the tasks listed in their contract.

At no time shall Respondent(s) permit or allow Respondent(s) personnel or subcontractors to have present at any agency facility, alcohol, controlled substances, or firearms.

Any person employed by Respondent(s) or any subcontractor who, in the reasonable opinion of agency, does not perform in a professional or skillful manner, or is disrespectful, intemperate, disorderly or otherwise objectionable, shall, at the written request of agency, be removed from the jobsite by the Respondent(s) or any subcontractor employing such person. Any such person who is removed shall not be assigned again to any agency facility without the prior written consent of agency.

B. 90 Day Quick Start Crew:

At the request of agency, respondent(s) may provide a one-time crew for a short duration (up to ninety (90) days) to include a supervisor and two (2) employees, two weeks after contract start. This crew will work nights and weekends as needed to complete general maintenance, painting, woodwork staining, carpentry, etc. The Respondent(s) is to provide a plan, outlining the projects this crew will complete, within 2 weeks of contract start. This plan will be agreed upon with the agency Site Services Director.

C. Onsite Facilities Management Team:

##### **Project Manager**

At the request of agency, respondent(s) may provide a full-time Project Manager (PM) dedicated to the agency. The PM shall possess three (3) to five (5) years of experience managing large asset

management/facility maintenance projects. The PM shall manage the overall administration, daily maintenance activities and Rapid Response demand support works and shall work out of agency's provided office space. Agency will provide office and storage space at the agency's Facility for the manager and crew. The PM shall be responsible for managing and scheduling all Respondent(s) resources including equipment, tools, personnel, and subcontractors and will be the key point of contact between the Respondent(s) and agency.

The PM shall conduct, at minimum, bi-weekly meetings with agency. Site Services Director to discuss any maintenance issues, rapid response demand support, procedural updates, or other issues affecting the services performed. All meetings shall be documented by Respondent(s) and made available to agency.

### **Facility Supervisor**

At the request of agency, Respondent(s) may provide a dedicated full-time Supervisor/Crew Lead (FS). This Supervisor shall possess two (2) to five (5) years of experience directing daily workload for a small crew. The FS shall be responsible for managing all the crews, specialists and subcontractors hired by Respondent(s) to perform the work requirements including the following tasks:

- Daily supervision of all technicians, laborers, specialists and subcontractors
- Field inspection of all work performed by the Respondent(s) and its subcontractors.
- Ensure that preventative maintenance is being performed on schedule and service calls are responded to and completed within the allotted time.
- Assist the PM with requested daily, weekly and monthly reporting requirements.

### **Skilled Facility Crews and Operations and Maintenance Staff**

Members of the crew shall be skilled in various types of facilities maintenance to include the services listed below. Painters shall have at least two (2) or more years of progressively increased experience in interior/exterior painting, staining, texturing, floating, finishing, wall repairs, sheet metal repair, and carpentry work.

The following services, at a minimum, may be performed by the onsite staff:

- HVAC
- Electrical
- Plumbing
- CUP Operations
- Lighting
- Preventive Maintenance
- CMMS System
- Chiller/Cooling Towers
- Painting, Staining
- Groundskeeping
- Custodial

The following services can be performed by the onsite operations and maintenance staff or the Respondent(s) can choose to manage a subcontractor:

- EMS
- Data Center
- Fire Systems
- Compressed Air

- Elevators
- Parking Lot(s)
- Generators/ATS
- Water Treatment
- Window Cleaning
- Pest Control
- Roof

### **Rapid Response Staff**

The following services, at a minimum, shall be performed by the onsite staff:

- Conference room set up
- Furniture requests
- Small moves
- Small repairs
- IT asset handling
- Paper delivery
- Copy centers
- Security support
- Signage
- Supplies
- Trash
- Keys/locks
- Shredding service

### **Behaviors and Attitude**

All Respondent(s) members supporting this contract shall have training in customer service. This should include, but not be limited to, providing services with friendly, can-do, positive, respectful attitudes and behaviors. The expectation is that the Respondent(s)'s onsite staff be ready to provide helpful customer service each and every day. The Respondent(s) needs to have the ability to be flexible with staff assignments, as projects and work orders vary day-to-day.

### **Uniforms**

All Respondent(s) members of the onsite staff shall wear a uniform acceptable to the agency. The exact specifications, colors, etc., will be mutually agreed upon and approved by the Site Services Director.

## **5. Other Items:**

### **A. Damages**

In the event a Respondent(s) fails to satisfactorily complete the scope of work in this RFP, and or response times are not met, Respondent(s), at the sole discretion of agency, may be subject to damages. Agency can deduct from the payments due the Respondent(s) each month, an agreed upon sum for actual, compensatory, consequential and/or liquidated damages. Where liquidated damages are mentioned, which is agreed upon not as a penalty, but as fixed and liquidated damages for each day/hour of such delay, to be paid in full and is subject to no deduction. If the payments due to Respondent(s) are less than the amount of such damages said damages shall be deducted from any other monies due or to become due the Respondent(s) or shall be paid by the Respondent(s)'s surety. Respondent(s) shall identify, in writing to the Site Services Director (SD), the reasons, conditions or any mitigating

circumstances for the non-compliance. The SD will review and determine the appropriate action to be taken. The agency SD will notify the Respondent(s) in writing as to any determination regarding the assessment of damages.

B. Purchase Order

Services and/or products must not be provided and invoices will not be paid without a purchase order, signed by agency. Purchase orders will be written in annual increments.

C. Invoices

Respondent(s) shall submit an invoice upon completion of each monthly deliverable. Monthly deliverables will be considered complete only upon written acceptance by agency. Each invoice shall include deliverable(s) completed and the price for each. Invoice shall be submitted on a monthly basis for maintenance work performed during the previous month. All payment requests will be accompanied by applicable weekly/monthly reports, backup tabulations, and copies of employee time sheets for hourly T&M (Time and Material) tasks. Monthly reports shall include Monthly Timesheet Report and Activity Completion Report. Respondent(s) shall provide a breakdown of charges in an agreed upon format, on the monthly invoice. No charges may be billed to agency unless such costs are explicitly included in the agreement. The exact format for monthly invoices and other attachments will be agreed upon between the Respondent(s) and agency during contract negotiations.

D. Payments

Respondent(s) will be compensated monthly based on the Pricing/Delivery Information sheet and in accordance with agency payment procedures.





## ATTACHMENT “5-A”

### FACILITY MAINTENANCE / MANAGEMENT SERVICE

#### EXECUTIVE SUMMARY

Thank you for giving TDIndustries the opportunity to provide our proposal for Facility Maintenance Service. We are excited by the opportunity to serve The Cooperative Purchasing Network. TDIndustries has the knowledge, experience, capabilities and flexibility to mobilize a workforce to meet the facility challenges facing NCPA.

The need for innovation and continuous improvement methods has never been greater. With our leadership and training programs, we will put in place a highly trained, competent project manager backed by executive leadership and a dedicated facility support and local service team. We will further develop a total facility service plan around your facility needs backed by additional highly skilled local technicians as needed. We will make the transition to TDIndustries seamless and provide ongoing service with no disruption to NCPA.

Benefit to the NCPA Agency Members—You get the benefit of our experience and capabilities in Facilities Management to develop and implement a proven staffing plan to meet your needs with the benefit of local support services and more than 300 highly-skilled technicians.

#### MANAGEMENT AND TECHNICAL EXPERTISE

TDIndustries proposes a manager that will proactively and effectively manage all aspects of facility services. He will be supported by an Operations Manager and our Professional Services Group. Our organization is specifically designed for efficiency with the flexibility to comply with both NCPA and TDIndustries’ operational requirements.

Benefit to the Agency Members of NCPA—With TDIndustries’ leadership and knowledge of facilities, policies and procedures, the transition period will be short with no disruptions—which will increase efficiencies and save you money.

#### CERTIFICATION/TRAINING OF MULTI-SKILLED WORKFORCE

TDIndustries utilizes highly-skilled technicians at all of our continuous-presence mechanical and facilities services sites. Each TDIndustries employee is tested using TDIndustries’ Progression Program. This training and certification program focuses on written and hands-on criteria to determine employee skill levels. The employee then enters the program with the full support of management to continue their career development in as many crafts as desired. Our staff can perform the necessary facilities responsibilities of things like HVAC, Electrical, Plumbing, Central Plant Operations, Lighting, Preventative Maintenance, various CMMS use, Chiller/ Cooling Towers, Painting, Staining, Parking Lots and Garages, Generators, Compressed Air systems, and Water Treatment. These duties are also performed for various types of facilities. Our technicians can also provide services like conference room set ups, small moves, security support, signage, supplies, and key and lock services.

Benefit to the Agency Members of NCPA—You will not waste any time or money developing a new certification / training program. You will also have the assurance that the people performing your repair work have the necessary skills for the job to be performed in a safe, efficient, and correct manner



## ATTACHMENT “5-A”

### FACILITY MAINTENANCE / MANAGEMENT SERVICE

#### EXECUTIVE SUMMARY

##### FULL-SERVICE SUPPLIER

TDIndustries is a full-service supplier of engineering, construction and maintenance service. By selecting TDIndustries, you will have more than 2,000 professionals and skilled technicians available to you. This includes specialty sub contracted services such as, landscaping services, fire, life and safety, pest control, Window Cleaning, Roof repairs, Shredding services, signage, paper delivery elevator maintenance and repair and janitorial services.

Benefit to the Agency Members of NCPA—Any need you might have associated with repairs, maintenance and capital projects is one phone call away.

##### MAINTENANCE EXPERIENCE

TDIndustries performs successful programs that help elevate safety, benchmarking, cost control, quality, equipment availability, management model, employee leadership, community involvement and long term relationships.

Benefit to the Agency Members of NCPA—You get the benefit of our management processes, procedures and expertise to develop and implement these programs.

##### SAFETY

TDIndustries is firmly committed to providing excellence in safety. From the CEO to the field supervisor to the technician, every employee recognizes and accepts the requirement to make safety our most important responsibility.

Within TDIndustries, safety and health are not priorities, but values instilled in our employees at all levels. TDIndustries is focused on getting everyone to automatically think about safety first.

Benefit to the Agency Members of NCPA—You will not waste any time or money dealing with the issues that arise from developing a new safety program for your mechanical and facility maintenance operation or from someone being injured in the workplace. These safety programs and policies already exist and produce excellent results.

##### TRANSITION PLAN

TDIndustries has the experience to implement a smooth transition. We have a structured transition plan with proven processes and procedures refined over hundreds of project startups.

Benefit to the Agency Members of NCPA—You get the benefit of TDIndustries' transition expertise to ensure no disruption of service at your buildings.

***TDIndustries has a team of dedicated professionals ready to support all of NCPA facility needs.***



## TAKE ADVANTAGE OF **Reopen & Rebuild America's Schools Act**

As you may have read, President Biden's proposed COVID-19 Relief plan for \$170 billion in funds for educational institutions was passed by the senate. The plan includes the Reopen and Rebuild America's Schools Act, which supports \$100 billion in grants for building infrastructure improvements. These funds are in addition to those made available from the March and December 2020 Cares Act legislation. According to the plan, educational institutions may use the funds to upgrade and/or replace equipment that will improve indoor air quality.

For institutions wishing to take advantage of this funding, enacting a responsible plan to deploy these funds may be difficult to do with existing resources. TDIndustries' Facilities group has assembled a Program Management team designed to assist educational institutions with assessing, designing, and implementing solutions to achieve the goal of improved indoor air quality. TD's four step approach was recently successful in deploying grant funds for the City of Dallas, where \$10 million in upgrades were completed at 103 facilities across the city's portfolio.

### **TD's comprehensive four-part program Includes:**

- » Facilities assessment
- » Management and oversight of recommend work including use of Minority/Women Business Enterprise (M/WBE) sub-contractors as needed
- » Quality control review to ensure work has been completed properly and in accordance with engineers' recommendations
- » Mechanical engineering recommendations for upgrades and/or replacements

### **Program Management**

Large programs require the management, coordination and integration of multiple, concurrent assignments. From concept through completion, TD provides necessary technical and administrative services to help our clients meet their program objectives. We act as an extension of our clients' staff, protecting their interests as our own.

We specialize in serving both public and private clients with extensive expertise in community infrastructure, including facilities for education, healthcare, national governments, sports and leisure, transportation, water and public gathering venues.

### **Representative Program Management Services provided include:**

- » Program Planning and Management
- » Master Scheduling/Schedule Analysis
- » Master Budget Development
- » Design Management
- » Cost Management
- » Delivery and Contracting Strategies
- » Cost Estimating

TD is currently supporting the City of Dallas with a Program Management effort focused on the improvement of indoor air quality across their portfolio of facilities





TD Industries

Attachment 5-B



## Facilities Operations and Maintenance

“ TD’s smart, sustainable and performance-improving operations bring you total control of your facility. ”



### THE TDINDUSTRIES DIFFERENCE

TDIndustries (TD) consistently generates incremental value delivered through innovative processes like these:

**Development of customer and facility-specific Key Performance Indicators (KPIs)** that identify critical operations, build processes and procedures to assure business continuity, and benchmark performance for future enhancement.

**Smart operating and capital budget planning** helps reconcile your system expenditures over time and find opportunities for future savings, both in terms of cost and energy.

**Cutting-edge, web-based computer maintenance management** puts you in control, and ensures accuracy and efficiency. Implemented by real-time work measurement solutions, wireless handheld technology, and our utility cost and tracking model.





**Investing in our people**, who are not called employees, but Partners. TD's innovative management process is comprehensive and inclusive. All of our Partners are presented with career development opportunities with significant technical training, which deepens product and service expertise.

**Planning and reporting for life** provides accounting processes and procedures with customized cost tracking and analysis to realize significant economies over the course of your system's life. Real-time energy metering gives insight and control to reduce operating costs and optimize system performance

**Up-to-date technical licensing and certification** is required of all TDPartners. We also expect them to exceed the minimum expectations in their job performance, no matter the size of the task.

**Leveraged purchasing power** secures advantageous pricing. Just-in-time inventory deliveries put the systems, parts and equipment right where you need them. Cost optimization gets the greatest value for your capital outgo. TD can offer you these extras because of our proven track record of longevity and accountability in the industry.

**Performance and results reporting** is tracked monthly, quarterly and annually for facilities and the TDPartners servicing them. Unannounced supervisor drop-ins measure the effectiveness of TD personnel and help reduce the risk of system outages, increase performance and reduce costs.

## WHY CHOOSE TDINDUSTRIES TO OPERATE YOUR FACILITY?

- » Significant operating cost reductions
- » Depth of site-based and external resources
- » Improved system reliability
- » Extended life of equipment
- » Improved energy efficiency and environmental quality
- » Quality assurance and risk mitigation
- » Best-in-class processes and procedures
- » Time-tested, smooth transition processes
- » Cross-training and cross-utilization of your people
- » Real-time feedback on work status

## THE FACE OF OPERATIONAL INTEGRATION

- » TD provides comprehensive operations and maintenance for airports, schools, government, corporations and commercial offices. Far beyond "keeping things running," TD develops innovative solutions to maintain, optimize and extend the life of your facility's critical infrastructure, no matter its size, age or configuration. TD's smart, sustainable and performance-improving operations bring you total control of your facility.

## COMMUNICATION AND ACCOUNTABILITY

- » We give you the full benefit of our robust knowledge-based systems to manage the delivery of services, thoroughly defining all standards and processes and then following them while providing you with ongoing feedback. We give you a single point of accountability, through which our full spectrum of services is channeled, so you are free to focus on your core business.



## SYSTEMS YOU CAN COUNT ON

TD offers superior solutions that include a Computer-Based Maintenance Management System (CMMS) with real-time assessment of equipment performance, costs and energy usage. Our experts in MEP, LEED and many other disciplines evaluate your plans and explore options for improving them. We can evaluate your current energy provider's package and assist in negotiating all your supply-side needs.

### TD offers deep expertise in operating and maintaining:

- » Education to K-12 and Higher Education
- » Government Facilities
- » Airports
- » Central Plants
- » Data Centers
- » Healthcare Facilities
- » High-tech Campuses
- » Industrial Facilities
- » Corporate Campuses

We also provide capital project management, an ongoing service that analyzes the changing state and needs of your system, whether it needs to be replaced, upgraded or retrofitted. In every aspect of our business, we're planning for the entire lifecycle of your facilities.

## TOP-TO-BOTTOM FACILITIES OPERATION AND MANAGEMENT

In addition to service and maintenance, we offer total facility management. Our commitment is to ensure that your mechanical equipment runs efficiently, smoothly and without interruption. Managed assets include:

- » Building System Integration
- » Electrical/Lighting
- » Fire and Life Safety
- » HVAC
- » Landscaping
- » Move Management
- » Plumbing
- » Refrigeration
- » Security
- » Structural Systems
- » Subcontract Management
- » Total Energy Management

## PARTNERS YOU CAN COUNT ON

TD is structured to support the total lifecycle of your building and protect your valued investments, as you would expect of an effective partner. For example, every project is built around rigorous communication schedules and performance evaluations. And when we partner with you in a facility management solution, we aim to make working transitions seamless and smooth. Mutual trust is key – when interests are merged, it has to be.



## COUNT ON TDINDUSTRIES

We're proud to deliver comprehensive lifecycle solutions that have grown to include:

- » Automation Controls and Integration, with 24/7 Monitoring Capability
- » Electrical/Lighting
- » Emergency Services
- » Energy Audits and Solutions
- » Facilities Operations
- » Fire and Life Safety
- » HVAC
- » Landscape Irrigation
- » Lean Manufacturing
- » Piping
- » Planned Maintenance
- » Plumbing
- » Prefabrication
- » Process Solutions
- » Refrigeration
- » Restaurant Equipment Services
- » Security/Access/Anti-Terrorism
- » Utility Metering/Submetering

### TDIndustries offers flexible ways of working with you:

- » Design-Assist
- » Design-Build
- » IPD - Integrated Project Delivery
- » LEED-Accredited Design
- » Move Management
- » Plan-Spec
- » Project Planning
- » Retrofit, Renovation and Repair
- » Service and Facilities
- » Turnkey Project Management





## **ABOUT TDINDUSTRIES**

In 1946, a handful of visionary individuals started a business called Texas Distributors, Inc., in a warehouse on Nagle Street in downtown Dallas. In the 75 years since, TD has developed into one of the nation's premier mechanical construction facilities and service companies. Today, TD is changing the face of the industry through sustainable, state-of-the-art innovations that result from putting our customers first.

We deeply appreciate the importance of partnership. You can count on TD to be your “go to” partner for all your facilities maintenance needs – everything from mission-critical solutions to standardized services. TD is equipped to handle any size project because we have unmatched, powerful resources: the people, processes, technology and manufacturing you need to get the job done.

***Houston // Dallas // Austin // Fort Worth // San Antonio // West Texas // Phoenix // Richardson***



# ASSET MANAGEMENT



TD Industries

## Incorporating Repeatable and Reliable Processes to Produce Consistent Results

TD started its Lean transformation journey approximately 13 years ago. Our leadership team identified Lean methodology and practices as a way to design production systems that minimize waste of materials, time and effort in order to generate the maximum possible amount of value to our customers. In asset management, we follow the DMAIC process, which refers to a data-driven improvement cycle used for improving, optimizing and stabilizing business processes and designs.

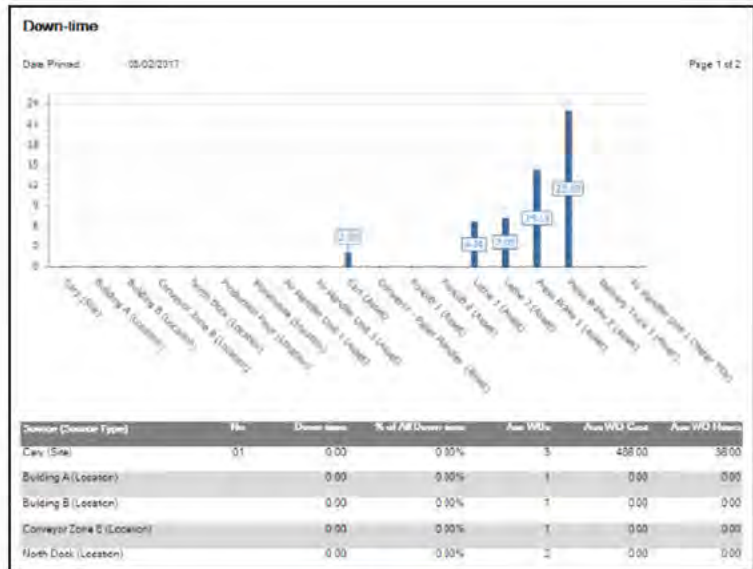
- **DEFINE:** We define the scope of work by collecting data utilizing an Install Base Evaluation identifying current assets in use and comparing these assets to inventory levels.
- **MEASURE:** After defining which assets are in the field, we will measure to see how much a client actually has by installing barcodes and QR codes to keep track of items and their condition or location. Data is updated in real-time as repairs are completed.
- **ANALYZE:** Once data has been defined, collected and recorded, TD performs a gap analysis. We analyze the data to understand the gaps in the field compared to other locations to identify cross-utilization opportunities across the portfolio providing cost avoidance and standardization of equipment.
- **IMPROVE:** We then utilize the data to appropriately plan for capital expenses and repairs.
- **CONTROL:** By analyzing historical data, you can make the most informed decisions and control your capital expenses. The entire process is a continual cycle.





## TD's CMMS Program

TD's program is a web-based platform that leverages Amazon web services "AWS" and seamlessly can connect to your active directory "AD" and enables users to track the progress of all maintenance activities, manage equipment uptime and reliability, increase productivity, and streamline operations. The Requester Module allows users across the enterprise to enter and review work orders from any web enable computer. Asset Essentials provides a mobile app which allows users to review and update data while in the field maximizing productivity. Management can use customizable dashboards and reports to stay on top of a Project's work status. Bar coding technology plays a key role in the asset management features of the program.



A sample report

The program includes both predictive and preventive maintenance technologies. The predictive feature tracks run-times, cycles, and readings all which can be reported over to assist in managing downtime and capital planning. The preventive maintenance scheduling feature can be schedule or meter based and can include predefined tasks to ensure proper compliance with manufacturer or corporate specifications.



**Successful capital plans - and their effective execution - enable TD and its Clients to reduce risk and cost, provide facilities to efficiently operate with reduced variable spend, promote a better working environment, and better serve the overall organizational goals and objectives.**



### Understand the Full Scope

TD captures asset conditions including warranty status, work order history and costs, age, condition, book value, and the average lifetime cost of repair by class to help manage the full cost picture of each asset managed to maximize an asset's life expectancy.

### Automate Warranty Control

Managing warranty timelines is essential to cost control; however, it's time-consuming for facility managers of large campuses. With our automated system, TD captures this information and applies it to relevant service requests. This ensures you don't pay twice.

### Simplify Record Management

Asset service records are maintained in real-time, allowing you and your team easy access. Repair and maintenance costs are captured as work is completed, allowing easier analysis of virtual intelligence. This allows you to spearhead your capital planning for future infrastructure enhancements.

### Make Informed Decisions

TD's customizable reporting empowers you and your team to make informed decisions transitioning from a reactive environment into a proactive maintenance program allowing you to utilize your team and resources more efficiently.





## Houston Community College Case Study

### **Houston Community College Nets Sustainable Results**

*TD Industries Puts its Skilled Team on Campus*

**Houston Community College (HCC) serves more than 70,000 students with 66 facilities covering 623 square miles. TD Industries maintains and services all of HCC's campus facilities.**



[tdindustries.com](http://tdindustries.com)

### **The Situation**

More than 40 TD facility partners support the HCC system. They provide all mechanical, electrical and plumbing services, including:

- HVAC systems,
- general maintenance,
- preventive and corrective maintenance,
- elevators and wheelchair lifts,
- building automation systems (BAS),
- building energy management systems (BEMS),
- building security systems (BSS),
- fire life safety equipment (FLSE, and
- computerize maintenance management system (CMMS) .



With its large geographic area and customer base, TD's challenges include:

- Managing and controlling the budget,
- Serving multiple locations and reaching them in Houston's high traffic corridors,
- Keeping customers, including students, faculty, administrators and visitors, satisfied,
- Dealing with fast transitions of less than 30 days,
- Maintaining and improving system reliability, and
- Attracting and retaining good technically competent managers and technicians.

Along with on-site facilities support, TD Industries provides incremental service and support from the company's Houston branch office. TD's goal with the HCC is to ensure a mutually responsive partnership that considers both short and long-term facilities needs and costs.

### **The Solution**

For technical support, TD employs the Maximo Computerize Maintenance Management System (CMMS). TD has also designed and implemented a preventive maintenance program based on the reliability centered maintenance (RCM) approach. In addition, TD has implemented a do-it-now (DIN) team to respond to customer needs.

One of the greatest transitions for HCC was moving from outsourcing to multiple vendors to bringing their facilities work back in-house and using additional resources as needed. To effectively make this transition, TD met with existing suppliers and evaluated those outsourced activities versus on-site work.

TD recommended that the majority of the facilities work move back on-site with TD staff and M/WBE Business Partners. The outcome was a zone maintenance approach along with a highly skilled all zone Business System Group, M/WBE business partners and backup support from TD's Houston branch office. This team composition has enabled rapid response to on-site maintenance requirements.



In order to meet TAMU's requirements for HVAC components and installations, TD procured and installed the following:

- 5 Air Handling Units
- 1 Outside Air Handling Units
- 8 Fan Coil Units
- 16 Airflow Monitoring Stations
- Two 20 hp Chilled Water Pumps
- Two 7.5 hp Heating Hot Water Pumps
- 2 Sound Attenuators
- 107 Fan Powered Terminal Units
- 128 Single Duct VAV Terminal Units
- Siemens was subcontracted to perform the installation of the Building Automation System, and integrate it to the main network on campus.
- Sound and acoustical accommodations were made to the HVAC system and the vertical storm drain risers with added insulation.
- More than 170,000 pounds of ductwork including double wall spiral and over seven miles of piping were fabricated in TD's manufacturing facility.

### **The Success**

The project was completed on time and on budget. Skanska USA and TAMU were impressed with TD's proactive communications, BIM leadership role and periodic safety audits conducted throughout the project.

*TD was also recognized for the firm's professionalism in working with other trades and the owner's representatives.*



[tdindustries.com](http://tdindustries.com)







# Houston Community College Case Study

## Houston Community College Nets Sustainable Results

*TDIndustries Puts its Skilled Team on Campus*

Houston Community College (HCC) serves more than 70,000 students with 66 facilities covering 623 square miles. TDIndustries maintains and services all of HCC's campus facilities.

### The Success

By completing the majority of the work on-site with highly trained TD personnel, two major benefits were achieved for HCC:

1. Increased customer response time and satisfaction, and
2. Budget efficiencies.

TD helped HCC succeed in reducing costs and improving life cycle operations by redesigning HCC's current operations and applying new technologies and a skillful team of technicians to maintain and support HCC's facilities.

By improving reliability and system comfort, HCC has experienced fewer corrective calls due to TD's improved preventive maintenance system. Monthly reporting enables TD to manage costs and performance.

Best of all, savings per year has been \$2 million with a projected \$10 million over the life of the 5-year contract.

For large campus solutions, TD's truck-based service, fire and life safety department, building automation controls (BAS) and special projects departments provide the depth and resources that deliver sustainable results.



[tdindustries.com](http://tdindustries.com)







## Background

Founded in 1882, Denton Independent School District sits roughly 30 miles north of Dallas. One of the fastest-growing school districts in the nation, Denton ISD has grown its campus space from 3.5 million sf to more than 6 million sf since 2007. With 45 K-12 schools and educational facilities, it has counted on TDIndustries to maintain and operate these facilities for 29 years.

## Challenges

Denton ISD's growth has been great for development, but also has come with growing pains. The school district has additional utility and energy costs, as well as increases in energy monitoring costs. With so many new buildings rising every year, the district quickly became overwhelmed with its manual monitoring method. One Denton ISD employee was calling every campus each month, then sending the bills to TD's engineering team to plug into a spreadsheet. Through this inefficient process, data was often 6-8 months behind.

## Solutions

TDIndustries provided two ways to combat these challenges:

**Growing its facility maintenance team:** As the district grew, TD's commitment did as well. TD flexed its labor and monitoring services to adequately fit the district's growing needs. With trained, onsite maintenance personnel, TD could control costs more efficiently than relying on service agreements. Currently, 25 Partners maintain and operate Denton ISD facilities.

**Provide energy monitoring services:** Using TD's energy tracking platform, TD automated the energy usage data and easily identified potential savings, problematic outliers, and improvements.

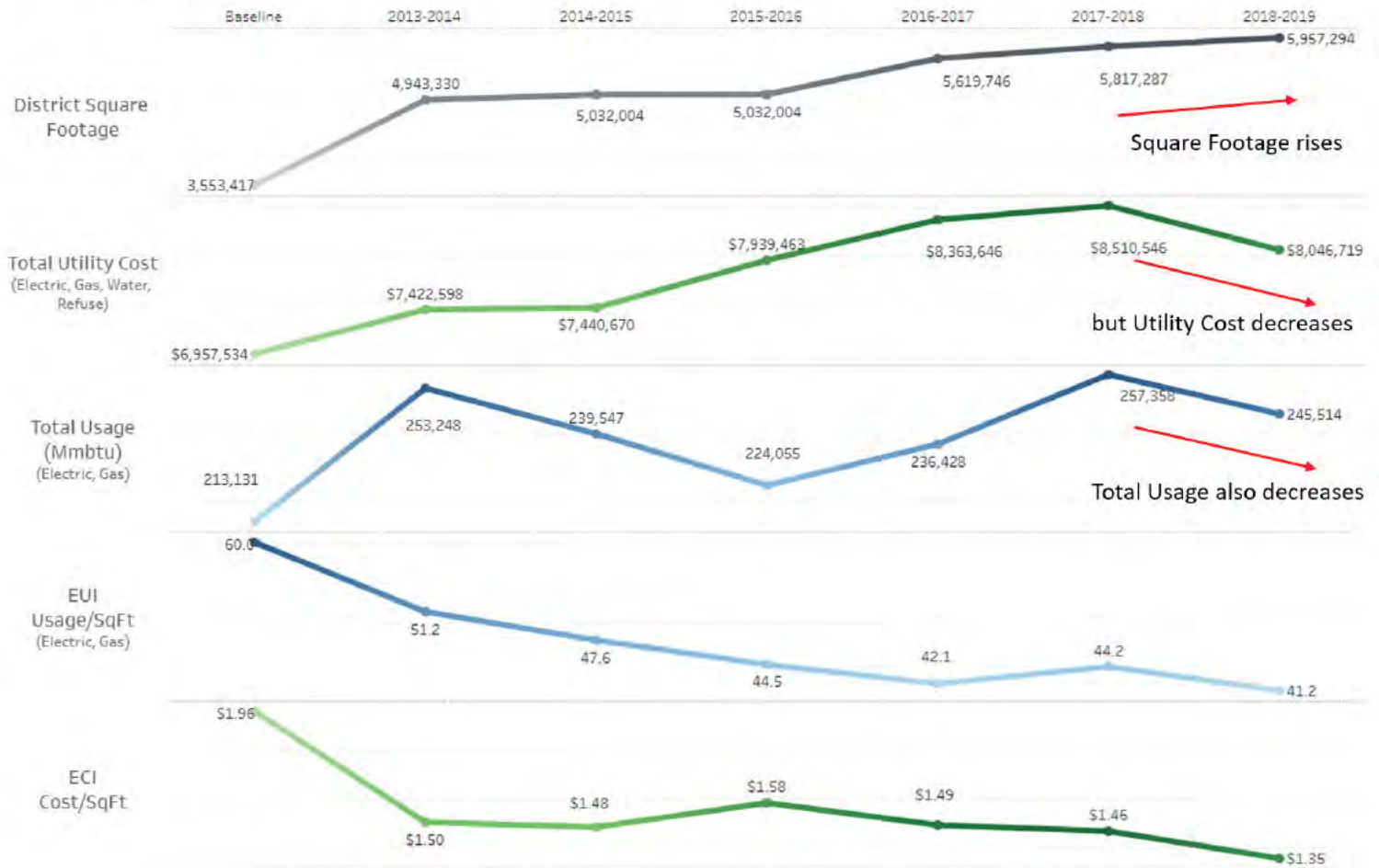
### Benefits of IFM for Denton ISD

- Cost reduction/mitigation
- Improved efficiency
- Right-sized support
- Utility monitoring
- Predictable cost structure
- Minimize backlog
- Single point of contact
- Growth options for employees

# TD PROVIDES SAVINGS OPPORTUNITIES FOR DENTON ISD



## Utility Performance Trends



Between 2018 and 2019, total square footage rose, but utility costs and total energy usage decreased.

## Results

In 2018, TDIndustries saved Denton ISD almost \$130,000 in utility bill savings – enough to hire two additional teachers, Superintendent Jamie Wilson said. These savings occurred while the total portfolio size increased from 5.8 million sf in 2018, to 5.95 in 2019. In that same time frame, total utility cost decreased from \$8.5 million to \$8 million, and total usage decreased from 257,358 million btu to 245,514. Additionally, TD’s energy monitoring service reduced natural gas costs by 25 percent. Beyond energy monitoring, TD’s energy tracking

program helped to identify a water usage spike. TD identified this data outlier as a water leak and promptly fixed it. Without the software, the utility company estimated that 10,000 gallons of water would have leaked before the problem would have been identified.

“We really work hard to find as many innovative ways as possible to get resources in the classroom,” Wilson said.

“One of the ways you do that is by having good partners who can help you do the different pieces that aren’t necessarily educating students, but they’re important for the work we do.”







# Operating An Efficient Convention Center Has Challenges

The George R Brown is a 1.8 Million square feet LEED Silver Certified Convention Center located in downtown Houston. Houston First - a local government corporation - manages the facility, and TD Industries operates the facility for the customer.

The Convention Center is an event-driven facility, and any given day, the in-use square footage ranges from 500 square feet to 1.8 million square feet. Other considerations include foot traffic, exhibits exchanges through-out the day and night, and Houston's dramatic changes in climate are additional load variations the facility faces on a day to day basis.

## The Personalized Energy Solution

utiliVisor, as a strategic partner to TDIndustries, was dispatched to collaboratively work towards implementing a system that would accomplish the following goals:

- 1.Reduce the cost of chilled water production by maximizing the effective dispatch and use of the plant's assets holistically through our Operations Center.
- 2.Provide insight into the effectiveness of the building automation system and make recommendations on how to improve sequences.
- 3.Prevent drift in the system, identify deficiencies, and ensure corrective measures were addressed effectively.
- 4.Track and validate the improvements in the system efficiency through our platform.
- 5.Train, support, and enhance the TD Operations Team on how to dispatch the resources to meet load and save energy through our Operations Center.





utiliVisor dispatched energy engineers onsite to evaluate the system, collect trend data, identify existing deficiencies, and understand the complexity of the operations at the George R. Brown Convention Center.

Upon completion of the site visit, we collaborated with TDIndustries to create a scope of work that would make the implementation and continued operations as efficient as possible.

## PARTNERSHIP CREATES AWARENESS AND DATA TRANSPARENCY

To monitor the energy consumption of the chiller plant and reduce overall energy usage, utiliVisor and TDIndustries implemented a platform of energy tracking services, that allowed for the reviewing, testing, and validating of plant operations.

Building this system allowed all energy data from the plant to be displayed in real-time on utiliVisor's platform engineered specifically for the George R. Brown Convention Center. utiliVisor established a baseline, and in the first two months of implementation, they began making optimization recommendations to the on-site operators.

"utiliVisor takes a stand that the capability of being more effective and efficient - is within the system. If we can get our operations and analytics around it, we can gain significant efficiency without having to go to a proprietary solution where you really have no insight and no ability to understand what the net benefit was."

- Shannon McAuliffe



## Validating Data Leads to Results and Decision-Making Reassurance

utiliVisor's platform established a baseline and captured the granular data providing TDIndustries and the utiliVisor Operation Center the ability to look at a multitude of variables, trend performance of equipment, and graph data.

The real-time insights and expert analysis ultimately allowed the team to make significant recommendations to the adjustment of the control's logic.

"We would have our team implement what utiliVisor was recommending, and we could watch it improve our operations through the platform.

The collaboration between our operators, utiliVisor staff, and seeing it in real-time, provided the operators with a greater understanding of why the change was requested. This process enhances our operators' understanding of the complexity of our system.

One of the things I think is great is that we're able to talk about the realities of implementing a change, and utiliVisor makes sure they fully understand what we're doing versus what they want. They care about our day-to-day challenges." - TJ Shiflet  
TDIndustries



utiliVisor's platform and staff enhance the operator's ability to understand holistic operations instead of just setpoint strategies. On-site operators can be more effective and understand the broader impact their actions have on the overall efficiency of the system. Plus, the system accounted for the savings acquired through enacting utiliVisor recommendations.

**"The expected savings was \$80,000 a year. The total attained savings is \$154,429... We estimate additional savings opportunities will be \$119,546."**





# At TD, Commitment Included in Contract



ST. MONICA  
CATHOLIC CHURCH

## TDIndustries' Facility Management Team De-Facto 'Part of the Staff' at St. Monica Church and School

In 2002, St. Monica Church and School signed a maintenance agreement with TDIndustries' Facility Management department. It was also the last time they thought about a new vendor.

For the past 16 years, TD and St. Monica have extended their partnership beyond a simple maintenance contract. For TD's team, it has evolved into a chance to serve.

"We've always had a good relationship with TD," said Debbie Diaz, the business manager for both the church and school. "We consider TD part of the staff; part of the group."

TD provides ongoing maintenance of both the church and school, but while the contract stops there, TD finds other ways to serve its customers. Tom Vines, TD's onsite facility manager, has served faithfully since 2009. His crew

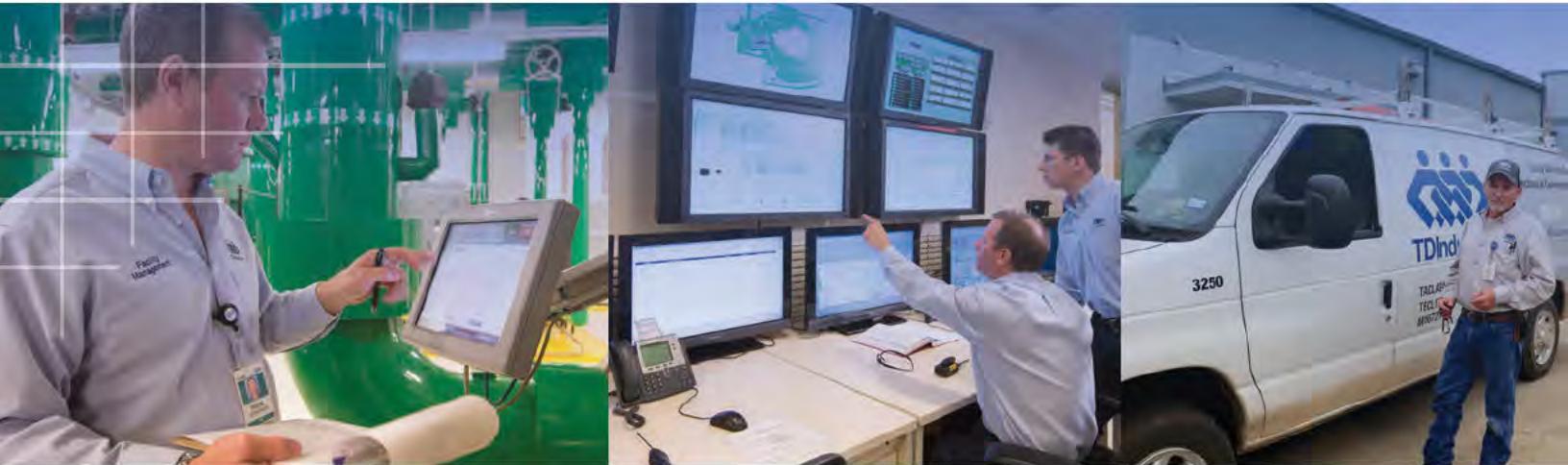
### Why choose TDIndustries?

- Commitment to performing the job right consistently
- Vast array of trades allow quick response to any issue
- History of quality management of all operations
- Partners who take ownership of building's health and company's wellness
- Internal standard to go beyond requirements to meet customer's needs





# At TD, Extra Effort is Expected



has jump-started cars, set up fair equipment, prepped the buildings for the first day of school, and fetched stray tennis balls off the roof.

"It's just part of our job," he said. "We do little stuff like that all the time to help out."

One Friday night, a parishioner was entering the church, and he walked straight through a pane of glass. He wasn't injured, but it left the building unsecured. With a quick after-hours call, Vines and his team were back at work, boarding up the opening until the replacement arrived.

St. Monica has been in operation for 60 years. Combined with the school, the site includes a church, library, classrooms, rectory/church offices, preschool, family center, gymnasium, playground, cafeteria, and recreational field. More than 800 students attend the school, which hosts preschool through eighth grade.

*"We really feel like they're working with us, not for us."*

**— Debbie Diaz,  
St. Monica Church  
and School  
business manager**

St. Monica has plans to renovate its school in the next few years. TD's knowledge with the renovation process, and the team's experience with the building have proved valuable. Vines and TD suggested repairs and changes

to the plans to make the process as smooth as possible.

"Most usually have a liaison for these projects, but we did it for them," Vines said. "We can do just about anything they need."

TD's secret to success is simple: frequent and excellent communication. Diaz and Vines talk daily, and Vines chats with the priests often. Meetings and investment in the facility help TD go that extra mile.

"We really feel like they're working with us, not for us," Diaz said.

TDIndustries has been committed to building and maintaining trusting relationships with all customers since 1946.





## TD Industries, Western Texas College Share Approach to Integrated Facilities Management

Western Texas College (WTC) bases its school values on James P. Owen's book *Cowboy Ethics*. When it searched for a new facility management service provider, it looked for companies who followed what Owen taught:

- Take pride in your work
- Always finish what you start
- Do what has to be done

When TD bid to become WTC's new facility management company, WTC saw a proud, friendly, and willing-to-help company. WTC knew they found the right fit.

"TD was able to step in and help right away," said Mitch Calhoun, WTC director of purchasing. "They're willing to take on projects around campus, and have made huge improvements in the overall look and function of campus."

Located 80 miles west of Abilene in Snyder, Western Texas College serves 10 counties and specializes in pre-professional and technical training for its 2,100 students. TD maintains a total of 29 buildings, including a coliseum and several off-campus structures.

TD's can-do spirit has been most evident where a team of four technicians tackles projects at the coliseum. When preparing for a rodeo, TD sets up animal pens, bucking chutes, roping chutes, and maintains the building and RV park. In some cases, TD has only days to get the coliseum ready for formal events like Chamber of Commerce meetings.

TD also sets the court for basketball games and volleyball matches, the stage for graduations, concerts, parties, and business discussions.

### Why choose TD Industries?

- Commitment to performing the job right consistently
- Vast array of trades allow quick response to any issue
- History of quality management of all operations
- Partners who take ownership of building's health and company's wellness
- Internal standard to go beyond requirements to meet customer's needs



# Facility Maintenance Just Across Campus



One winter when the campus needed heat quickly, TD replaced a half-mile stretch of a leaking gas line. When sidewalks needed to be replaced, TD laid new tracks. When other necessary projects arose, TD had the expertise and willingness to get it done as a team.

“It really doesn’t matter around here – if it’s asked of us, then we make time for it to happen as requested,” TD Project Manager Mike Bailey said. “We’re servant leaders at work, so we always find a way.”

One of the greatest improvements Calhoun has noticed has been at the two largest dorms: Glover Hall and Clinton Hall. Both accommodate approximately 150 students each. College students are notoriously rough on dorms, but TD’s team tackled maintenance to show immediate living improvements. In addition, Bailey’s team implemented cost savings through LED lighting installations, and other innovations to the buildings and work processes.

“Mike has been really good about updating them. Electrical, gas ... It’s great to see that happening,” Calhoun said.

Like WTC, TD prides itself on its core values: safety, trust, servant leadership, improvements, and diversity of thought. At Western Texas, Calhoun quickly saw TD integrating these values into the college’s culture. Many Western Texas employees knew Mike and his TDPartners by name within weeks. Today, they’re fully installed as de-facto members of the campus staff, and have truly “taken ownership of the campus,” Calhoun said.

Some contracts feature hidden costs and vague language that can keep owners on the hook for services they expected the facilities management company to absorb. Western Texas was

seeking a clear path to improvements, and TD’s transparent discussions, billing, and decision-making made that a reality.

That, along with TD’s reputation for going above and beyond everyday maintenance, sold Calhoun. He was pleasantly surprised with TD’s willingness to take on the maintenance of the fleet of campus vehicles.

“It’s not a large fleet; maybe 20-25, but they are looking out for the best interests and function of the campus,” Calhoun said. TD is proud to have a Partner that is a certified automotive technician at WTC.

Perhaps the biggest value to Calhoun was the additional support TD’s Service and Construction department could offer the college. Whenever an extensive project required outside help, Bailey could partner with TD’s Service or Construction department to provide expertise, equipment, and additional labor.

“If it’s asked of us, then we make time for it to happen.”  
— Mike Bailey,  
TD Project Manager  
at Western Texas College

“We have Service Partners who can be here on the same day,” Bailey said. “When we do annual chiller maintenance, Service only needs to send one technician, because our Facilities team partners with him to learn and work together. We get to help him and WTC realized the savings. If we need more help, we can reach across the company to find the resources to solve it, because that is the heart of the work we do every day all across Texas.”

With a shared commitment to common values, TDIndustries and Western Texas College have worked to achieve a positive, steadily growing business relationship that ultimately increases the culture and prestige of the campus.







Product Title	Building Type / Size	Typical Sales Leader	Sales Process
<b>Energy Solutions</b>	<ul style="list-style-type: none"> <li>Greater than 100,000 sq/ft</li> <li>Multi Building Campus</li> <li>Large Process Loads</li> </ul>	<ul style="list-style-type: none"> <li>Special Projects, Business Development Manager</li> </ul>	<ul style="list-style-type: none"> <li>Miller Heiman Sales Process</li> </ul>
<b>TDSaves</b>	<ul style="list-style-type: none"> <li>Less than 100,000 sq/ft</li> </ul>	<ul style="list-style-type: none"> <li>Truck Based Service, Business Development Manager</li> </ul>	<ul style="list-style-type: none"> <li>Sandler Sales Process</li> </ul>

### Characteristics of a Sale

- Sold to Owners of Buildings
- Follows a Structured Sales Process that includes an Energy Audit
- Reduced operating costs pay for project and services
- Negotiated at the Executive Level
- Includes ongoing Measurement and Verification (M&V) of savings
- Can include an Energy Savings Guarantee
- Includes Multi-Year Support Services
- Often includes utility incentives and financing

### Partial List of Energy Conservation Measures

#### HVAC

- Replace worn-out inefficient equipment
- Install variable frequency drives
- Perform retro-commissioning
- Install/upgrade, integrate building control systems
- Chiller Control Systems

#### Plumbing

- Water Saving Fixtures
- Intelligent Irrigation Controls
- Replace inefficient boilers and water heaters
- Solar Thermal

#### Electrical

- Lighting Fixture Retrofits
- Power Factor Correction
- Demand Response Program
- Solar PV

#### Support Services

- Service Agreements
- M&V Services
- Building Performance Management (**utiliVisor**)

### This information outlines the “Go to market Strategies” Using Utility Savings as the Value Proposition

- It is to be used as a guideline helping you make the right decisions on the type of proposal, presentation and product offering.
- It also instructs you on which sales technique is appropriate for a given job opportunity.
- Following these guidelines as closely as possible increases the chances for better customer relations and higher margins.

# TAB 8 - VALUE ADDED PRODUCTS AND SERVICES

## TAB 8 CONTENTS:

VALUE ADDED PRODUCTS AND SERVICES

# ADDITIONAL INFORMATION

*i. Provide any additional information related to products and services Offeror proposes to enhance and add value to the Contract.*

<p><b>Facilities Maintenance and Operations/Facilities Management Services</b></p> <p><b>Please see Attachment “G-1”</b></p>	<p>Type: Full Facility Operations and Maintenance</p> <p>Our Customers:</p> <ul style="list-style-type: none"> <li>» Airports</li> <li>» Higher Education</li> <li>» Convention and Entertainment</li> <li>» Corporate Environment</li> <li>» Data Centers/Critical Environments</li> <li>» Government</li> <li>» Healthcare</li> <li>» School Districts</li> </ul> <p>Personnel: All work performed by TD Partners</p> <p>Detailed Features and Benefits:</p> <p>Your buildings serve a deeper purpose; it provides a welcoming, safe environment that houses your customers, staff, and students. We tailor facilities management service to support your business goals. With a local on-site highly qualified team and a wide range of services, we stand ready to flex with your business needs.</p> <ul style="list-style-type: none"> <li>» Mechanical system operation and maintenance</li> <li>» Vertical transportation</li> <li>» Security systems</li> <li>» Renovation and retrofit</li> <li>» Fire Life and Safety</li> <li>» Lighting</li> <li>» Energy Management</li> <li>» Cost containment</li> <li>» LEED certification</li> </ul>
<p><b>Fire Life and Safety (FLS)</b></p> <p><b>Please see Attachment “G-2”</b></p>	<p>Type: Code Compliance, Auditing, Design Engineering, Construction Management, Operation and Maintenance, Training</p> <p>Fire Suppression Systems and Services</p> <p>Personnel: All work performed by TD Partners</p> <p>Detailed Features and Benefits:</p> <p>TDIndustries offers a full range of Fire/Life Safety and Fire Suppression Systems and Services. The need for innovation and continuous improvement methods has never been greater. With our leadership and training programs, we will put in place highly trained personnel to provide a turnkey project performing all key technical, management, and financial functions.</p>



# ADDITIONAL INFORMATION

<p><b>Energy Savings Performance and Management Solutions</b></p> <p><b>Please see Attachment “G-3”</b></p>	<p>Type: Energy Auditing and Facility Assessment</p> <ul style="list-style-type: none"> <li>» Preliminary Audit-Expert modeling and analysis of baseline energy usage and savings</li> <li>» Detailed Energy Audit-Project development and economic analysis</li> </ul> <hr/> <p>Personnel: All work performed by TD Partners</p> <hr/> <p>Detailed Features and Benefits:</p> <ul style="list-style-type: none"> <li>» In-house Design Engineering and Specification</li> <li>» Construction Project Management</li> <li>» Procurement of materials and trade labor</li> <li>» Safety coordination by our in-house Certified Safety Professional and OSHA-Authorized Trainer</li> <li>» Continuous Commissioning</li> <li>» Ongoing Maintenance and Support Services</li> <li>» Guaranteed Savings Performance Monitoring and Verification</li> <li>» Performance guarantee backed by a history of financial strength, organizational longevity</li> <li>» Facility Staff and Occupant Training</li> <li>» Financing Procurement Support</li> <li>» Including identifying and securing all available grants, rebates, and incentives available to offset project costs</li> </ul>
<p><b>Automation/Controls</b></p> <p><b>Please see Attachment “G-4”</b></p>	<p>Type: Building Automation Systems/Systems Integration Services (BPSI Anti-Terrorism Facility Protection, Intelligent Irrigation Matters, Lighting, Metering, Security/Access Controls, System Integration)</p> <hr/> <p>Personnel: All work performed by TD Partners</p> <hr/> <p>Detailed Features and Benefits:</p> <p>TDIndustries develops, deploys, and supports the entire spectrum of intelligent automation and sustainability technologies because they save our customers money. Not only reducing energy costs, but maintenance and emergency costs as well. At the same time, smart systems increase overall efficiency and tenant satisfaction, and extend the life of your building. Our processes dramatically affect long-term planning and your bottom line.</p> <p>They drive efficiencies that, in the end, pay for themselves, including:</p> <ul style="list-style-type: none"> <li>» Total integration of the systems in your building</li> <li>» Reduce operating expenses</li> <li>» You get to make better system choices</li> <li>» A centralized location for all facility data</li> <li>» Web-based interface and open systems architecture</li> <li>» Real-time measurement</li> <li>» Increased tenant satisfaction</li> <li>» Increased employee productivity</li> <li>» Increased property value</li> </ul>

# ADDITIONAL INFORMATION

<p><b>Truck Based Services</b></p> <p><b>Please see Attachment “G-5”</b></p>	<p>Type: We offer complete Refrigeration, HVAC, Plumbing, and Electrical repair and maintenance services.</p> <p>Personnel: All work performed by TD Partners</p> <p>Detailed Features and Benefits:</p> <p>We offer a wide variety of superior services ready for immediate response and resolution of jobs of all sizes and complexity. Our comprehensive truck based services, ServiceLink technology, and our broad spectrum of service and repair plans are just a few of the ways we support our commitment to service.</p>
<p><b>Refrigeration</b></p> <p><b>Please see Attachment “G-5”</b></p>	<p>Type: Commercial Refrigeration Installation, Repair and Maintenance</p> <p>Personnel: All work performed by TD Partners</p> <p>TD works with a variety of manufacturers to offer you the best possible costs on equipment and parts. We also provide preventative maintenance contracts to increase the efficiency and extend the life of your equipment. Our employees are highly trained and experienced to install and service commercial refrigeration systems and are on call 24/7/365 to provide your company with emergency repairs. We support a variety of equipment with low temperature needs and HVAC (heating, ventilation, and air conditioning) sales and service.</p> <p>A sample of the types of facilities we service:</p> <ul style="list-style-type: none"> <li>» Supermarkets</li> <li>» Colleges and Schools</li> <li>» Convenience Stores</li> <li>» Restaurants</li> <li>» Taverns &amp; Bars</li> <li>» Manufacturing Facilities</li> <li>» Refrigerated Warehouses</li> </ul>

# ADDITIONAL INFORMATION

<b>HVAC</b> <b>Please see Attachment "G-5"</b>	Type: Commercial Heating & Air Conditioning System Services
	Personnel: All work performed by TD Partners
	Detailed Features and Benefits:  TD offers comprehensive services for boilers, chillers, air handlers, pumping systems, control systems, and water treatment. Our performance guarantees are unmatched by any other company in this industry. Not only is your exposure to risk reduced, but the quality of service you can expect is superior as well. Regularly scheduled inspections, 24- hour emergency service, full-service maintenance and repairs all extend the life of your systems.
<b>Electrical</b> <b>Please see Attachment "G-5"</b>	Type: Electrical Repair Services
	Personnel: All work performed by TD Partners
	Detailed Features and Benefits:  TD is Equipped to handle all of your electrical needs with highly skilled technicians who are licensed and certified in the latest national electrical codes, city codes, and OSHA safety regulations. our service professionals are empowered to give on-site quotes for providing: <ul style="list-style-type: none"> <li>» Interior Finish-Out</li> <li>» Industrial Systems</li> <li>» Electrical Controls</li> <li>» Infrared Imaging Services</li> <li>» Lighting Contracts</li> <li>» Multifamily Services</li> <li>» Outdoor Lighting</li> <li>» Retrofits and Upgrades</li> </ul>
<b>Plumbing</b> <b>Please see Attachment "G-5"</b>	Type: Commercial Plumbing Services
	Personnel: All work performed by TD Partners
	Detailed Features and Benefits:  For the total lifecycle of your facility - repairs, replacements, renovations, or retrofits - TD has the resources in place. Fully licensed plumbers are available 24 hours a day, seven days a week, to provide: <ul style="list-style-type: none"> <li>» Boiler/Chiller System Repair and Maintenance</li> <li>» Hydro-Jet Service</li> <li>» Water System Repair and Maintenance</li> <li>» Sewer System Repair and Maintenance</li> <li>» Gas System Repair and Maintenance</li> <li>» Certified Backflow Testing</li> <li>» OSHA Certified Confined Entry</li> <li>» Certified Medical Gas Installation and Repair</li> <li>» Electronic Leak Detection</li> <li>» Electronic Line Location</li> <li>» Pro-Temp Service and Maintenance</li> </ul>

# ADDITIONAL INFORMATION

## ATTACHMENT “G-1”

### FACILITY MAINTENANCE / MANAGEMENT SERVICE

#### EXECUTIVE SUMMARY

Thank you for giving TDIndustries the opportunity to provide our proposal for Facility Maintenance Service. We are excited by the opportunity to serve The Cooperative Purchasing Network. TDIndustries has the knowledge, experience, capabilities and flexibility to mobilize a workforce to meet the facility challenges facing NCPA.

The need for innovation and continuous improvement methods has never been greater. With our leadership and training programs, we will put in place a highly trained, competent site manager backed by professional management and a dedicated facility support and local service team. We will further develop a total facility service plan around your facility needs and support our onsite Supervisor with additional local technicians as needed. We will make the transition to TDIndustries seamless and provide ongoing service with no disruption to NCPA.

Our staffing plan is built on flexibility. The billable cost presented in the Pricing Section covers staffing as required in the RFP.

*Benefit to the Agency Members of NCPA—You get the benefit of our experience and capabilities in Facilities Management to develop and implement a staffing plan to meet your needs, at no additional charge.*

#### MANAGEMENT AND TECHNICAL EXPERTISE

TDIndustries proposes a manager that will proactively and effectively manage all aspects of facility services. He will be supported by an Operations Manager and our Professional Services Group. Our organization is specifically designed for efficiency with the flexibility to comply with both NCPA and TDIndustries’ operational requirements.

Benefit to the Agency Members of NCPA—With TDIndustries’ leadership and knowledge of facilities, policies and procedures, the transition period will be short with no disruptions—which will increase efficiencies and save you money.

#### CERTIFICATION/TRAINING OF MULTI-SKILLED WORKFORCE

TDIndustries utilizes highly-skilled technicians at all of our continuous-presence mechanical and facilities services sites. Each TDIndustries employee is tested using TDIndustries’ Progression Program. This training and certification program focuses on written and hands-on criteria to determine employee skill levels. The employee then enters the program with the full support of management to continue their career development in as many crafts as desired.

*Benefit to the Agency Members of NCPA—You will not waste any time or money developing a new certification /training program. You will also have the assurance that the people performing your repair work have the necessary skills for the job to be performed in a safe, efficient, and correct manner.*

# ADDITIONAL INFORMATION

## ATTACHMENT “G-1”

### FACILITY MAINTENANCE / MANAGEMENT SERVICE

#### EXECUTIVE SUMMARY

##### FULL-SERVICE SUPPLIER

TDIndustries is a full-service supplier of engineering, construction and maintenance service. By selecting TDIndustries, you will have over 2,000 professionals and skilled technicians available to you. This includes specialty services such as total facilities and HVAC repair.

*Benefit to the Agency Members of NCPA—Any need you might have associated with repairs, maintenance and capital projects is one phone call away.*

##### MAINTENANCE EXPERIENCE

TDIndustries performs successful programs that help elevate safety, benchmarking, cost control, quality, equipment availability, management model, employee leadership, community involvement and long term relationships.

*Benefit to the Agency Members of NCPA—You get the benefit of our management processes, procedures and expertise to develop and implement these programs at no additional charge.*

##### SAFETY

TDIndustries is firmly committed to providing excellence in safety. From the CEO to the field supervisor to the technician, every employee recognizes and accepts the requirement to make safety our most important responsibility.

Within TDIndustries, safety and health are not priorities, but values instilled in our employees at all levels.

TDIndustries is focused on getting everyone to automatically think about safety first.

*Benefit to the Agency Members of NCPA—You will not waste any time or money dealing with the issues that arise from developing a new safety program for your mechanical and facility maintenance operation or from someone being injured in the workplace. These safety programs and policies already exist and produce excellent results.*

##### TRANSITION PLAN

TDIndustries has the experience to implement a smooth transition. We have a structured transition plan with proven processes and procedures refined over hundreds of project startups.

*Benefit to the Agency Members of NCPA—You get the benefit of TDIndustries’ transition expertise to help ensure no disruption of service at your buildings.*



# ADDITIONAL INFORMATION

## ATTACHMENT “G-2”

### FIRE/LIFE SAFETY AND FIRE SUPPRESSION SYSTEMS

#### EXECUTIVE SUMMARY

Thank you for giving TDIndustries the opportunity to provide our proposal for Fire/Life Safety and Fire Suppression Systems. We are excited by the opportunity to serve The Cooperative Purchasing Network.

TDIndustries offers a full range of Fire/Life Safety and Fire Suppression Systems and Services. The need for innovation and continuous improvement methods has never been greater. With our leadership and training programs, we will put in place highly trained personnel to provide a turnkey project performing all key technical, management, and financial functions.

#### CODE COMPLIANCE AUDITING

TDIndustries uses a holistic approach that combines visual inspection, technical analysis, and interviews with facility staff in order that we may provide NCPA with a detailed review of the current state of buildings fire alarm and fire suppression systems and current code issues that may impact the building and its occupants. This approach enables our engineers to construct a detailed report and a current code compliance matrix that will provide the highest capacity for improvement and the best value to NCPA.

*Benefit to the Agency Members of NCPA—Successful life safety system and infrastructure improvement programs resulting in increased building occupant safety and current code compliance.*

#### DESIGN ENGINEERING

The design engineering process emphasizes minimization of cost while providing quality designs. The same engineers that participated in the audits will complete the project design, create bid specifications, assist with construction management, and consult on operations. TDIndustries refers to this approach as the “closed-loop” management strategy, which insures consistency and a high degree of quality control throughout the project life cycle and is essential in providing NCPA with an integrated best value solution.

*Benefit to the Agency Members of NCPA —Allows for a smooth transition from the development stage through the operations stage.*

#### CONSTRUCTION MANAGEMENT

TDIndustries construction management team will inspect the work of all subcontractors for compliance with the design documents and project intent and will develop specific project acceptance criteria, startup, commissioning, and retro-commissioning processes. TDIndustries will focus intently on scheduling work in a manner that minimizes disruption while maintaining a safe environment.

*Benefit to the Agency Members of NCPA —TDIndustries construction strategy will provide for fast implementation and short construction timelines while minimizing disruptions to the building occupants so that the customer will begin to realize life safety system improvements early in the project while minimizing disruption.*

# ADDITIONAL INFORMATION

## ATTACHMENT “G-2”

### FIRE/LIFE SAFETY AND FIRE SUPPRESSION SYSTEMS

#### EXECUTIVE SUMMARY

#### OPERATION AND MAINTENANCE

TDIndustries will provide a maintenance program for all or part of the contract term, as desired by NCPA, for all equipment installed under the project. Our role as one of the nation’s most experienced Truck and Site-based Services provider and as an operator of facilities for a wide variety of clients, has enabled us to become expert at developing maintenance plans that will help provide reliable operation with minimal downtime and operational disruption.

*Benefit to the Agency Members of NCPA —You will receive a maintenance strategy that will be based on cost-effectiveness while ensuring that equipment remains in optimal operating condition through the application of sound preventative and predictive maintenance programs.*

#### TRAINING

TDIndustries primary focus for education will be to ensure that the impacted people understand why changes are being made, the proper use of new equipment, and procedures for reporting equipment not performing properly. Technical training for facility personnel will be to provide comprehensive instruction on the operation, troubleshooting, maintenance, and repair of equipment and systems modified or installed.

*Benefit to the Agency Members of NCPA —All parties working together to ensure improved safety, reliability, and peace of mind on a sustained basis.*

*“TDIndustries has a team of dedicated professionals ready to support all of NCPA facility needs”.*

# ADDITIONAL INFORMATION

## ATTACHMENT “G-3”

### ENERGY SAVINGS PERFORMANCE CONTRACTING

#### EXECUTIVE SUMMARY

Thank you for giving TDIndustries the opportunity to provide our proposal for Energy Savings Performance Contracting (ESPC). We are excited by the opportunity to serve The Cooperative Purchasing Network.

TDIndustries offers a full range of ESPC Services. The need for innovation and continuous improvement methods has never been greater. With our leadership and training programs, we will put in place highly trained personnel to provide a turnkey project performing all key technical, management, and financial functions.

#### ENERGY AUDITING

TDIndustries uses a holistic approach that combines visual inspection, technical analysis, and interviews with facility staff in order that we may provide NCPA with an Investment Grade Energy. This approach enables our engineers to construct a detailed model that will provide the highest capacity for improvement and the best value to NCPA.

*Benefit to the Agency Members of NCPA—Successful energy efficiency and infrastructure improvement programs resulting in realistic savings.*

#### DESIGN ENGINEERING

The design engineering process emphasizes minimization of cost while providing quality designs. The same engineers that participated in the audits will complete the project design, create bid specifications, assist with construction management, and consult on operations. TDIndustries refers to this approach as the “closed-loop” management strategy, which insures consistency and a high degree of quality control throughout the project life cycle and is essential in providing NCPA with an integrated best value solution.

*Benefit to the Agency Members of NCPA —Allows for a smooth transition from the development stage through the operations stage.*

#### CONSTRUCTION MANAGEMENT

TDIndustries construction management team will inspect the work of all subcontractors for compliance with the design documents and ECM intent and will develop specific project acceptance criteria, startup, commissioning, and retro-commissioning processes. TDIndustries will focus intently on scheduling work in a manner that minimizes disruption while maintaining a safe environment.

*Benefit to the Agency Members of NCPA —TDIndustries construction strategy will provide for fast payback items with short construction timelines to be installed first so that the customer will begin to realize savings early in the project.*

# ADDITIONAL INFORMATION

## ATTACHMENT “G-3”

### ENERGY SAVINGS PERFORMANCE CONTRACTING

#### EXECUTIVE SUMMARY

##### OPERATION AND MAINTENANCE

TDIndustries will provide a maintenance program for all or part of the contract term, as desired by NCPA, for all equipment installed under the project. Our role as one of the nation’s most experienced Truck and Site-based Services provider and as an operator of central energy plants for a variety of facilities, has enabled us to become expert at developing maintenance plans that will help provide reliable operation with minimal downtime and operational disruption.

*Benefit to the Agency Members of NCPA —You will receive a maintenance strategy that will be based on cost-effectiveness while ensuring that equipment remains in optimal operating condition through the application of sound preventative and predictive maintenance programs.*

##### MEASUREMENT AND VERIFICATION PLAN DEVELOPMENT

TDIndustries places a great emphasis on the measurement of results and takes great pride in the performance of our projects. We will develop an annual Measurement & Verification (M&V) plan that best meet the requirements of NCPA and which will be in compliance with International Performance Measurement and Verification Protocols and with the Texas Energy Assessment Monitoring and Verification Guidelines.

*Benefit to the Agency Members of NCPA —An agreed upon M&V plan that will clearly measure the results and protect NCPA from the potential of an under-performing project.*

##### TRAINING

TDIndustries primary focus for education will be to ensure that the impacted people understand why changes are being made, the proper use of new equipment, and procedures for reporting equipment not performing properly. Technical training for facility personnel will be to provide comprehensive instruction on the operation, troubleshooting, maintenance, and repair of equipment and systems modified or installed.

*Benefit to the Agency Members of NCPA —All parties working together to ensure improved comfort, reliability, and guaranteed energy savings on a sustained basis.*

*“TDIndustries has a team of dedicated professionals ready to support all of NCPA facility needs”.*



# ADDITIONAL INFORMATION

## ATTACHMENT “G-4”

### AUTOMATION AND CONTROLS

#### EXECUTIVE SUMMARY

TD knows and deeply understands how seamlessly, efficiently and optimally buildings operate when they have the right automation and controls. And the truth is, these days you can't afford not to have them.

#### ENERGY AUDITING

That's why having automation and controls are so critical. They dramatically affect long-term planning and your bottom line. Plus they drive efficiencies that, in the end, pay for themselves, including:

- » Total integration of the systems in your building
- » Reduce operating expenses
- » You get to make better system choices
- » A centralized location for all facility data
- » Web-based interface and open systems architecture
- » Real-time measurement
- » Increased tenant satisfaction
- » Increased employee productivity
- » Increased property value

*Benefit to the Agency Members of NCPA— can make a dramatic difference in how intelligently your business operates. We're here to enhance your facility and guide you toward economies in all areas of your business. However, these days the one area in which you can get the most cost savings is in energy consumption. At the heart of energy savings is automation and controls.*

#### BPSI ANTI-TERRORISM FACILITY PROTECTION

TD has an exclusive agreement with BPSI, the developers of the first complete chemical, biological, radiological, nuclear (CBRN) detection system that actively and reliably protects buildings, mass transit stations, stadiums and public events from airborne toxins. It's a breakthrough, mission-critical detection solution no building should be without.

#### INTELLIGENT IRRIGATION MATTERS

A number of technologically astute irrigation systems are available to help you manage your grounds. Should you need sprinkler systems with automatic sensors, we can provide them. Should you need a sustainable solution, we offer a system that captures and uses rainwater and gray water. But these are just a couple of the many innovative irrigation services available. You can rely on TD professionals' in-depth knowledge and understanding to guide you in determining which systems will be best for your facility.

### AUTOMATION AND CONTROLS

#### EXECUTIVE SUMMARY

##### LIGHTING

Better lighting control increases productivity. That’s why TD is ready with high-level conceptual solutions. We do it all – from design and implementation of new lighting systems to retrofits with existing operations. Either way, we make sure they are properly integrated with other critical building systems.

Sustainability is also paramount in terms of using energy efficiently, which is why TD offers clever daylight strategies to extend light in the workplace. Another unique offering is the manipulation and modulation of artificial lighting to reflect daylight availability.

##### METERING

TD enables you to have real-time knowledge about utility consumption. When you know what’s going on, you save.

The industry-defining solution we offer is utiliVisor, a well-known Continuous Commissioning™ application. Our Web-based, continuous oversight process measures, presents and analyzes key facility indicators – 24/7. It calculates real-time operating cost, and monitors and archives critical building data. You can’t afford not to use it.

TD can install meters and sub-meters, or even integrate with existing meters. Beyond savings on metering solutions, this can also improve your tenant billing accuracy.

##### SECURITY / ACCESS CONTROLS

Safeguarding your building is an area of expertise for us. That’s why TD offers the most sophisticated systems available that include CCTV Camera Systems, Video Badging, Access Control and more. You can feel confident and secure that TD is watching out for you in every way.

##### SYSTEM INTEGRATION

Superior system integration means receiving one intelligent, comprehensive solution that provides effective streamlining of operations, lower installation costs and optimized energy efficiency. It also reduces operating costs, offers multiple protocol management, and gives you something that everybody wants: increased comfort and productivity in the workplace. At TD, you get all this and more, from the following specialized services:

- » Custom Integration Solutions
- » HVAC Control Systems
- » Lighting Control Systems
- » Direct Digital Controls
- » Electronic Access Controls
- » Video Badging
- » CCTV Camera Systems
- » Power Distribution
- » Elevator Controls
- » Planned Maintenance
- » Emergency Systems and Services
- » Software and Programming Support
- » Operator Support and Training
- » Remote Monitoring and Support
- » Multi-Building Campus Integration
- » Utility Metering Solutions
- » Energy Use and Consumption Analysis
- » Design Specification Consulting

# ADDITIONAL INFORMATION

## ATTACHMENT “G-5”

### HVAC, ELECTRICAL, AND PLUMBING

#### EXECUTIVE SUMMARY

#### TRUCK BASED SERVICES

TD has a wide variety of superior services ready for immediate response and resolution of jobs of all sizes and complexity, the core of which is based in our comprehensive Truck-Based Services.

In addition to truck-based services, real-time operations are what drive this excellent offering, the foundation of which is a proprietary, state-of-the-art Tier 1 database. This world-class, highly secure knowledge base is comprised of everything that can possibly be logged from the day we begin your service: start-up dates, service numbers, statistics, strategic plans, LEED reports, energy calculations and more.

More than 65 years of experience has led us to consistently offer you the following tangible benefits:

- » Technical expertise – extensively trained, experienced TD Partners
- » Self-performed delivery
- » Customer Contact Center – 24/7 live operator and dispatch
- » Large truck fleet – 300+ available at all times
- » Broad geographic coverage

*Planned Maintenance Services / Select Capital Projects / Scheduled Repair and Replace Services / Emergency On-Demand Service*

*Benefit to the Agency Members of NCPA — We are available 24 hours a day, seven days a week, 365 days a year. For service that extends beyond a one-time visit, we offer Diagnostic Evaluation and Problem Resolution. Also, our service plans have no manufacturer bias. TD will research all manufacturers for the absolute best value and application when replacing system components. We work with you to give you the best solutions because we have your best interests in mind.*

## ATTACHMENT “G-5”

### HVAC, ELECTRICAL, AND PLUMBING

#### EXECUTIVE SUMMARY

##### REFRIGERATION

TDIndustries is a local service provider with a wide range of capabilities that include Commercial Kitchen repairs and maintenance. TDIndustries’ local team is comprised of licensed technicians in HVAC, Plumbing, and Electrical adding to total capabilities. The TD commercial kitchen group has extensive experience with a variety of equipment.

This type of equipment includes but is not limited to:

- » Coolers
- » Ice machines
- » Ovens
- » Steamers
- » Warmers
- » Fryers
- » Grills and Griddles
- » Beverage Dispensers
- » Exhaust Systems
- » Walk-in Coolers
- » Batch Freezers
- » Commercial and Industrial Refrigeration

TDIndustries is familiar with numerous purchasing cooperatives allowing TD to streamline purchasing needs on special projects that may be time sensitive. As a local service provider staffed with a 24-hr service call line we are available with response times typically between 2-4 hours and in some cases sooner.

Our Industrial Refrigeration and Food and Beverage Equipment technicians service both hot-side as well as cold-side equipment in food service and industrial or commercial operations.

##### ELECTRICAL

Whether replacing a light switch, rebuilding a 1,000-amp service in the middle of the night, or providing major service upgrades, TD is equipped to handle your electrical needs. Here are the benefits of our services:

- » Highly skilled technicians that are licensed, certified and trained in the latest national electrical codes, city codes and OSHA safety regulations
- » Service professionals empowered to give on-site quotes, offering you competitive estimates
- » Expert installers that deliver interior finish-out and system upgrades

Plus, TD responds 24 hours a day, seven days a week to provide:

- » Electrical Controls
- » Industrial Systems
- » Infrared Camera Services
- » Lighting Contracts
- » Multi-family Service
- » Outdoor Lighting
- » Retrofits and Upgrades
- » Surge Protection



# ADDITIONAL INFORMATION

## ATTACHMENT “G-5”

### HVAC, ELECTRICAL, AND PLUMBING

#### EXECUTIVE SUMMARY

#### PLUMBING

From emergency repairs to a major renovation, a small or large commercial industrial or multi-family installation, TD has the resources. Years of extensive experience, training and education programs enable us to fully understand what it takes to keep your specific system operating at its peak efficiency. Fully licensed plumbers are available 24 hours a day, seven days a week for your convenience. Among the highly specialized plumbing services available are:

- » Boiler/Chiller System Repair and Maintenance
- » Hydro-Jet Service
- » Water System Repair and Maintenance
- » Sewer System Repair and Maintenance
- » Gas System Repair and Maintenance
- » Certified Backflow Testing
- » OSHA-Certified Confined Entry
- » Certified Medical Gas Installation and Repair
- » Electronic Leak Detection
- » Electronic Line Location
- » Sewer Pipe Video Inspection
- » Pro-Temp Service and Maintenance

#### HVAC

TD offers expert, comprehensive services that include everything from boilers, chillers, and air handlers to pumping systems, control systems and water treatment. Our performance guarantees are admittedly unmatched by any other company, so it reduces your risk. You can also expect regularly scheduled inspections, 24-hour emergency service, and full-service maintenance and repairs that extend the life of your systems.

TD's strength in commercial HVAC service is based upon the coupling of high-level thinking with high concept technology. It's a powerful dynamic that empowers expert, brand-savvy TD professionals to investigate and swiftly uncover the root causes of building system failures. And then offer exceptional commercial HVAC solutions you can trust. In the technology arena, TD leverages:

- » Special leak-detection tools, which mean faster and less disruptive repairs
- » Infrared imaging that identifies potentially dangerous situations in your electrical circuitry
- » Vibration analysis that reduces your equipment downtime and extends equipment life

Overall, TD's ability for solving air-conditioning and refrigeration problems is respected throughout the industry. Why? It all comes down to customer trust, which is based on putting you first.

## **TAB 9 - REQUIRED DOCUMENTS**

### **TAB 9 CONTENTS:**

**CLEAN AIR AND WATER ACT / DEBARMENT NOTICE**

**CONTRACTORS REQUIREMENTS**

**ANTITRUST CERTIFICATION STATEMENTS**

**REQUIRED CLAUSES FOR FEDERAL FUNDS CERTIFICATIONS**

**REQUIRED CLAUSES FOR FEDERAL ASSISTANCE BY FTA**

**STATE NOTICE ADDENDUM**

# Tab 9 – Required Documents

---

- ◆ Clean Air and Water Act / Debarment Notice
- ◆ Contractors Requirements
- ◆ Antitrust Certification Statements
- ◆ Required Clauses for Federal Funds Certifications
- ◆ Required Clauses for Federal Assistance by FTA
- ◆ State Notice Addendum

## Clean Air and Water Act & Debarment Notice

I, the Vendor, am in compliance with all applicable standards, orders or regulations issued pursuant to the Clean Air Act of 1970, as Amended (42 U.S. C. 1857 (h), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15 as required under OMB Circular A-102, Attachment O, Paragraph 14 (1) regarding reporting violations to the grantor agency and to the United States Environment Protection Agency Assistant Administrator for the Enforcement.

I hereby further certify that my company has not been debarred, suspended or otherwise ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension", as described in the Federal Register and Rules and Regulations

Potential Vendor	<u>TDIndustries, Inc.</u>
Print Name	<u>Brian Lillard</u>
Address	<u>13850 Diplomat Dr.</u>
City, State, Zip	<u>Dallas TX 75234</u>
Authorized signature	<u><small>DocuSigned by:</small> <i>Brian Lillard</i></u>
Date	<u><small>0E754DB12068493...</small> 7/2/2021</u>



## **Contractor Requirements**

### **Contractor Certification Contractor's Employment Eligibility**

By entering the contract, Contractor warrants compliance with the Federal Immigration and Nationality Act (FINA), and all other federal and state immigration laws and regulations. The Contractor further warrants that it is in compliance with the various state statues of the states it is will operate this contract in.

Participating Government Entities including School Districts may request verification of compliance from any Contractor or subcontractor performing work under this Contract. These Entities reserve the right to confirm compliance in accordance with applicable laws.

Should the Participating Entities suspect or find that the Contractor or any of its subcontractors are not in compliance, they may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

The offeror complies and maintains compliance with the appropriate statutes which requires compliance with federal immigration laws by State employers, State contractors and State subcontractors in accordance with the E-Verify Employee Eligibility Verification Program.

Contractor shall comply with governing board policy of the NCPA Participating entities in which work is being performed

#### **Fingerprint & Background Checks**

If required to provide services on school district property at least five (5) times during a month, contractor shall submit a full set of fingerprints to the school district if requested of each person or employee who may provide such service. Alternately, the school district may fingerprint those persons or employees. An exception to this requirement may be made as authorized in Governing Board policy. The district shall conduct a fingerprint check in accordance with the appropriate state and federal laws of all contractors, subcontractors or vendors and their employees for which fingerprints are submitted to the district. Contractor, subcontractors, vendors and their employees shall not provide services on school district properties until authorized by the District.

The offeror shall comply with fingerprinting requirements in accordance with appropriate statutes in the state in which the work is being performed unless otherwise exempted.

Contractor shall comply with governing board policy in the school district or Participating Entity in which work is being performed

#### **Business Operations in Sudan, Iran**

In accordance with A.R.S. 35-391 and A.R.S. 35-393, the Contractor hereby certifies that the contractor does not have scrutinized business operations in Sudan and/or Iran.


Authorized signature \_\_\_\_\_  \_\_\_\_\_  
 Date \_\_\_\_\_ 7/2/2021 \_\_\_\_\_



## Antitrust Certification Statements (Tex. Government Code § 2155.005)

I affirm under penalty of perjury of the laws of the State of Texas that:

- (1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;
- (2) In connection with this bid, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15;
- (3) In connection with this bid, neither I nor any representative of the Company has violated any federal antitrust law; and
- (4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

Company name	<u>TDIndustries, Inc.</u>
Address	<u>15830 Diplomat Dr.</u>
City/State/Zip	<u>Dallas, TX 75234</u>
Telephone No.	<u>972-888-9500</u>
Fax No.	<u>972-888-9507</u>
Email address	<u>brian.lillard@tdindustries.com</u>
Printed name	<u>Brian Lillard</u>
Position with company	<u>Vice President of Facility Management Services</u>
Authorized signature	<u> 0E754DB12068493...</u>

## Required Clauses for Federal Funds Certifications

Participating Agencies may elect to use federal funds to purchase under the Master Agreement. The following certifications and provisions may be required and apply when a Participating Agency expends federal funds for any purchase resulting from this procurement process. Pursuant to 2 C.F.R. § 200.326, all contracts, including small purchases, awarded by the Participating Agency and the Participating Agency's subcontractors shall contain the procurement provisions of Appendix II to Part 200, as applicable.

### **APPENDIX II TO 2 CFR PART 200**

(A) Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

(B) Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of \$10,000)

(C) Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 CFR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

Pursuant to Federal Rule (C) above, when a Participating Agency expends federal funds on any federally assisted construction contract, the equal opportunity clause is incorporated by reference herein.

(D) Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision

for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

(E) Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

(F) Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of “funding agreement” under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.

(G) Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended— Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

(H) Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

(I) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee



of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

#### **RECORD RETENTION REQUIREMENTS FOR CONTRACTS INVOLVING FEDERAL FUNDS**

When federal funds are expended by Participating Agency for any contract resulting from this procurement process, offeror certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.333. The offeror further certifies that offeror will retain all records as required by 2 CFR § 200.333 for a period of three years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

#### **CERTIFICATION OF COMPLIANCE WITH THE ENERGY POLICY AND CONSERVATION ACT**

When Participating Agency expends federal funds for any contract resulting from this procurement process, offeror certifies that it will comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6321 et seq.; 49 C.F.R. Part 18).

#### **CERTIFICATION OF COMPLIANCE WITH BUY AMERICA PROVISIONS**

To the extent purchases are made with Federal Highway Administration, Federal Railroad Administration, or Federal Transit Administration funds, offeror certifies that its products comply with all applicable provisions of the Buy America Act and agrees to provide such certification or applicable waiver with respect to specific products to any Participating Agency upon request. Purchases made in accordance with the Buy America Act must still follow the applicable procurement rules calling for free and open competition.

# **Required Clauses for Federal Assistance provided by FTA**

## **ACCESS TO RECORDS AND REPORTS**

Contractor agrees to:

- a) Maintain all books, records, accounts and reports required under this Contract for a period of not less than three (3) years after the date of termination or expiration of this Contract or any extensions thereof except in the event of litigation or settlement of claims arising from the performance of this Contract, in which case Contractor agrees to maintain same until Public Agency, the FTA Administrator, the Comptroller General, or any of their duly authorized representatives, have disposed of all such litigation, appeals, claims or exceptions related thereto.
- b) Permit any of the foregoing parties to inspect all work, materials, payrolls, and other data and records with regard to the Project, and to audit the books, records, and accounts with regard to the Project and to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed for the purpose of audit and examination.

*FTA does not require the inclusion of these requirements of Article 1.01 in subcontracts. Reference 49 CFR 18.39 (i)(11).*

## **CIVIL RIGHTS / TITLE VI REQUIREMENTS**

- 1) Non-discrimination. In accordance with Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C. § 2000d, Section 303 of the Age Discrimination Act of 1975, as amended, 42 U.S.C. § 6102, Section 202 of the Americans with Disabilities Act of 1990, as amended, 42 U.S.C. § 12132, and Federal Transit Law at 49 U.S.C. § 5332, Contractor or subcontractor agrees that it will not discriminate against any employee or applicant for employment because of race, color, creed, national origin, sex, marital status age, or disability. In addition, Contractor agrees to comply with applicable Federal implementing regulations and other implementing requirements FTA may issue.
- 2) Equal Employment Opportunity. The following Equal Employment Opportunity requirements apply to this Contract:
  - a. Race, Color, Creed, National Origin, Sex. In accordance with Title VII of the Civil Rights Act, as amended, 42 U.S.C. § 2000e, and Federal Transit Law at 49 U.S.C. § 5332, the Contractor agrees to comply with all applicable Equal Employment Opportunity requirements of U.S. Dept. of Labor regulations, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor, 41 CFR, Parts 60 et seq., and with any applicable Federal statutes, executive orders, regulations, and Federal policies that may in the future affect construction activities undertaken in the course of this Project. Contractor agrees to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, marital status, or age. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation; and selection for training, including apprenticeship. In addition, Contractor agrees to comply with any implementing requirements FTA may issue.
  - b. Age. In accordance with the Age Discrimination in Employment Act (ADEA) of 1967, as amended, 29 U.S.C. Sections 621 through 634, and Equal Employment Opportunity Commission (EEOC) implementing regulations, "Age Discrimination in Employment Act", 29 CFR Part 1625, prohibit employment discrimination by Contractor against individuals on the basis of age, including present and prospective

employees. In addition, Contractor agrees to comply with any implementing requirements FTA may issue.

- c. Disabilities. In accordance with Section 102 of the Americans with Disabilities Act of 1990, as amended (ADA), 42 U.S.C. Sections 12101 *et seq.*, prohibits discrimination against qualified individuals with disabilities in programs, activities, and services, and imposes specific requirements on public and private entities. Contractor agrees that it will comply with the requirements of the Equal Employment Opportunity Commission (EEOC), "Regulations to Implement the Equal Employment Provisions of the Americans with Disabilities Act," 29 CFR, Part 1630, pertaining to employment of persons with disabilities and with their responsibilities under Titles I through V of the ADA in employment, public services, public accommodations, telecommunications, and other provisions.
  - d. Segregated Facilities. Contractor certifies that their company does not and will not maintain or provide for their employees any segregated facilities at any of their establishments, and that they do not and will not permit their employees to perform their services at any location under the Contractor's control where segregated facilities are maintained. As used in this certification the term "segregated facilities" means any waiting rooms, work areas, restrooms and washrooms, restaurants and other eating areas, parking lots, drinking fountains, recreation or entertainment areas, transportation, and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, color, religion or national origin because of habit, local custom, or otherwise. Contractor agrees that a breach of this certification will be a violation of this Civil Rights clause.
- 3) Solicitations for Subcontracts, Including Procurements of Materials and Equipment. In all solicitations, either by competitive bidding or negotiation, made by Contractor for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by Contractor of Contractor's obligations under this Contract and the regulations relative to non-discrimination on the grounds of race, color, creed, sex, disability, age or national origin.
  - 4) Sanctions of Non-Compliance. In the event of Contractor's non-compliance with the non-discrimination provisions of this Contract, Public Agency shall impose such Contract sanctions as it or the FTA may determine to be appropriate, including, but not limited to: 1) Withholding of payments to Contractor under the Contract until Contractor complies, and/or; 2) Cancellation, termination or suspension of the Contract, in whole or in part.

*Contractor agrees to include the requirements of this clause in each subcontract financed in whole or in part with Federal assistance provided by FTA, modified only if necessary to identify the affected parties.*

### **DISADVANTAGED BUSINESS PARTICIPATION**

This Contract is subject to the requirements of Title 49, Code of Federal Regulations, Part 26, "*Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs*", therefore, it is the policy of the Department of Transportation (DOT) to ensure that Disadvantaged Business Enterprises (DBEs), as defined in 49 CFR Part 26, have an equal opportunity to receive and participate in the performance of DOT-assisted contracts.

- 1) Non-Discrimination Assurances. Contractor or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this Contract. Contractor shall carry out all applicable requirements of 49 CFR Part 26 in the award and administration of DOT-assisted contracts. Failure by Contractor to carry out these requirements is a material breach of this Contract, which may result in the termination of this Contract or other such remedy as public agency deems appropriate. Each subcontract Contractor signs with a subcontractor must include the assurance in this paragraph. (See 49 CFR 26.13(b)).

- 2) Prompt Payment. Contractor is required to pay each subcontractor performing Work under this prime Contract for satisfactory performance of that work no later than thirty (30) days after Contractor's receipt of payment for that Work from public agency. In addition, Contractor is required to return any retainage payments to those subcontractors within thirty (30) days after the subcontractor's work related to this Contract is satisfactorily completed and any liens have been secured. Any delay or postponement of payment from the above time frames may occur only for good cause following written approval of public agency. This clause applies to both DBE and non-DBE subcontractors. Contractor must promptly notify public agency whenever a DBE subcontractor performing Work related to this Contract is terminated or fails to complete its Work, and must make good faith efforts to engage another DBE subcontractor to perform at least the same amount of work. Contractor may not terminate any DBE subcontractor and perform that Work through its own forces, or those of an affiliate, without prior written consent of public agency.
- 3) DBE Program. In connection with the performance of this Contract, Contractor will cooperate with public agency in meeting its commitments and goals to ensure that DBEs shall have the maximum practicable opportunity to compete for subcontract work, regardless of whether a contract goal is set for this Contract. Contractor agrees to use good faith efforts to carry out a policy in the award of its subcontracts, agent agreements, and procurement contracts which will, to the fullest extent, utilize DBEs consistent with the efficient performance of the Contract.

### **ENERGY CONSERVATION REQUIREMENTS**

Contractor agrees to comply with mandatory standards and policies relating to energy efficiency which are contained in the State energy conservation plans issued under the Energy Policy and Conservation Act, as amended, 42 U.S.C. Sections 6321 *et seq.* and 41 CFR Part 301-10.

### **FEDERAL CHANGES**

Contractor shall at all times comply with all applicable FTA regulations, policies, procedures and directives, including without limitation those listed directly or by reference in the Contract between public agency and the FTA, as they may be amended or promulgated from time to time during the term of this contract. Contractor's failure to so comply shall constitute a material breach of this Contract.

### **INCORPORATION OF FEDERAL TRANSIT ADMINISTRATION (FTA) TERMS**

The provisions include, in part, certain Standard Terms and Conditions required by the U.S. Department of Transportation (DOT), whether or not expressly set forth in the preceding Contract provisions. All contractual provisions required by the DOT, as set forth in the most current FTA Circular 4220.1F, dated November 1, 2008, are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Contract. Contractor agrees not to perform any act, fail to perform any act, or refuse to comply with any public agency requests that would cause public agency to be in violation of the FTA terms and conditions.

### **NO FEDERAL GOVERNMENT OBLIGATIONS TO THIRD PARTIES**

Agency and Contractor acknowledge and agree that, absent the Federal Government's express written consent and notwithstanding any concurrence by the Federal Government in or approval of the solicitation or award of the underlying Contract, the Federal Government is not a party to this Contract and shall not be subject to any obligations or liabilities to agency, Contractor, or any other party (whether or not a party to that contract) pertaining to any matter resulting from the underlying Contract.



*Contractor agrees to include the above clause in each subcontract financed in whole or in part with federal assistance provided by the FTA. It is further agreed that the clause shall not be modified, except to identify the subcontractor who will be subject to its provisions.*

#### **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS**

Contractor acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. §§ 3801 et seq. and U.S. DOT regulations, "Program Fraud Civil Remedies," 49 CFR Part 31, apply to its actions pertaining to this Contract. Upon execution of the underlying Contract, Contractor certifies or affirms the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be made, pertaining to the underlying Contract or the FTA assisted project for which this Contract Work is being performed.

In addition to other penalties that may be applicable, Contractor further acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification, the Federal Government reserves the right to impose the penalties of the Program Fraud Civil Remedies Act of 1986 on Contractor to the extent the Federal Government deems appropriate.

Contractor also acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification to the Federal Government under a contract connected with a project that is financed in whole or in part with Federal assistance originally awarded by FTA under the authority of 49 U.S.C. § 5307, the Government reserves the right to impose the penalties of 18 U.S.C. § 1001 and 49 U.S.C. § 5307 (n)(1) on the Contractor, to the extent the Federal Government deems appropriate.

*Contractor agrees to include the above clauses in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clauses shall not be modified, except to identify the subcontractor who will be subject to the provisions.*

## **State Notice Addendum**

The National Cooperative Purchasing Alliance (NCPA), on behalf of NCPA and its current and potential participants to include all county, city, special district, local government, school district, private K-12 school, higher education institution, state, tribal government, other government agency, healthcare organization, nonprofit organization and all other Public Agencies located nationally in all fifty states, issues this Request for Proposal (RFP) to result in a national contract.

For your reference, the links below include some, but not all, of the entities included in this proposal:

[http://www.usa.gov/Agencies/State\\_and\\_Territories.shtml](http://www.usa.gov/Agencies/State_and_Territories.shtml)

<https://www.usa.gov/local-governments>

# APPENDIX

## APPENDIX:

### ADDITIONAL QUALIFICATIONS AND EXPERIENCE

# QUALIFICATIONS AND EXPERIENCE

viii. Provide any additional information relevant to this section.



## LIFE-CYCLE SOLUTIONS

Unlike most mechanical construction providers, TDIndustries is also a full service design, facility management and demand-service provider.

By being a life-cycle mechanical contractor we are able to offer our customers a “one-stop shop” solution for our customers. We understand the unique requirements of critical operating systems.

## SAFETY

### COVID-19 PROTOCOL

With COVID-19 affecting the economy in a negative way, companies have found themselves in a recession-like situation, faster and earlier than expected. With the unknown ahead, TD is proactively working to keep partners safe and clients happy.

To stay ahead of the pandemic and to help ensure the safety of others, TD has implemented protocol for COVID-19 on every jobsite including:



### SAFETY AWARDS

TDIndustries continues to be acknowledged as a leader in safety at the local, regional and national levels, most recently by the Associated General Contractors (AGC) of America where TDIndustries won the Second Place National Construction Safety Excellence Award for a Specialty Contractor with Over 1 Million Work Hours. The award was earned based on results, risk mitigation, hazard identification and control, training and a comprehensive safety program. For many years, those results (EMR, TRIR and other measurements) tell the same story - TD is a leader in the Specialty Contracting Industry. Our safety metrics have consistently been among the best in the country.

In 2019 TDIndustries' Safety Culture was recognized by both AGC and ABC:

- ABC Pinnacle Safety Award
- Second Place National Construction Safety Excellence Award by the Associated General Contractors of America (AGC)



# TD'S WORLD-CLASS SAFETY PROGRAM

Our commitment to safety is reflected in our Core Values. Our Partners are the most valued assets of the company and the welfare of everyone is of the highest importance. We continually and aggressively communicate our safety programs to our Partners and subcontractors.

TDIndustries remains committed to continuously improving our safety programs and culture. In an effort to become a world-class safety focused organization, we began to practice behavioral-based safety. Following this process leads to a more proactive approach, focusing on safe behaviors to prevent injuries. In 2016, we debuted the TD Safety Observation Training (TSOT) program for behavior-based safety training. All leaders from the CEO to foremen have underwent TSOT education.

Safety Observations are the key to improving safety performance by addressing the lead measure indicators and behaviors before they manifest as incidents. These tools will be incorporated into our safety program for this project as well. All local Partners attend our safety orientations which cover all major safety topics for construction sites.



To help ensure a drug-free workplace, we have a comprehensive drug testing program including: pre-employment drug screen, post-incident drug screen, random drug screens and screening upon probable cause. In addition, we require weekly safety meetings, as well as a “Pre-Task Safety Plan” which consists of an outline of individual tasks, any required PPE and how to perform the task safely.

## RECENT SAFETY DATA

	EMR	LTIR	TRIR	TOTAL HOURS WORKED
2019	.63	.03	1.4	6,661,989
2018	.77	.3	2.3	6,136,430
2017	.7	.2	2	5,686,471
2016	.73	.2	2.3	4,671,298
2015	.68	.1	2	4,167,223

## A SAMPLE OF TD TRAININGS AND CERTIFICATIONS FOR SUPERINTENDENTS, SUPERVISORS, AND MORE

All field supervisors or leads are required to take TEXO Safety First, OSHA 10-hour safety training, as well as other TD required training such as PPE, Fall Protection, EEW, Lockout-Tagout, etc.



FIRST AID/CPR



PPE



LADDER



TEXO SAFETY FIRST

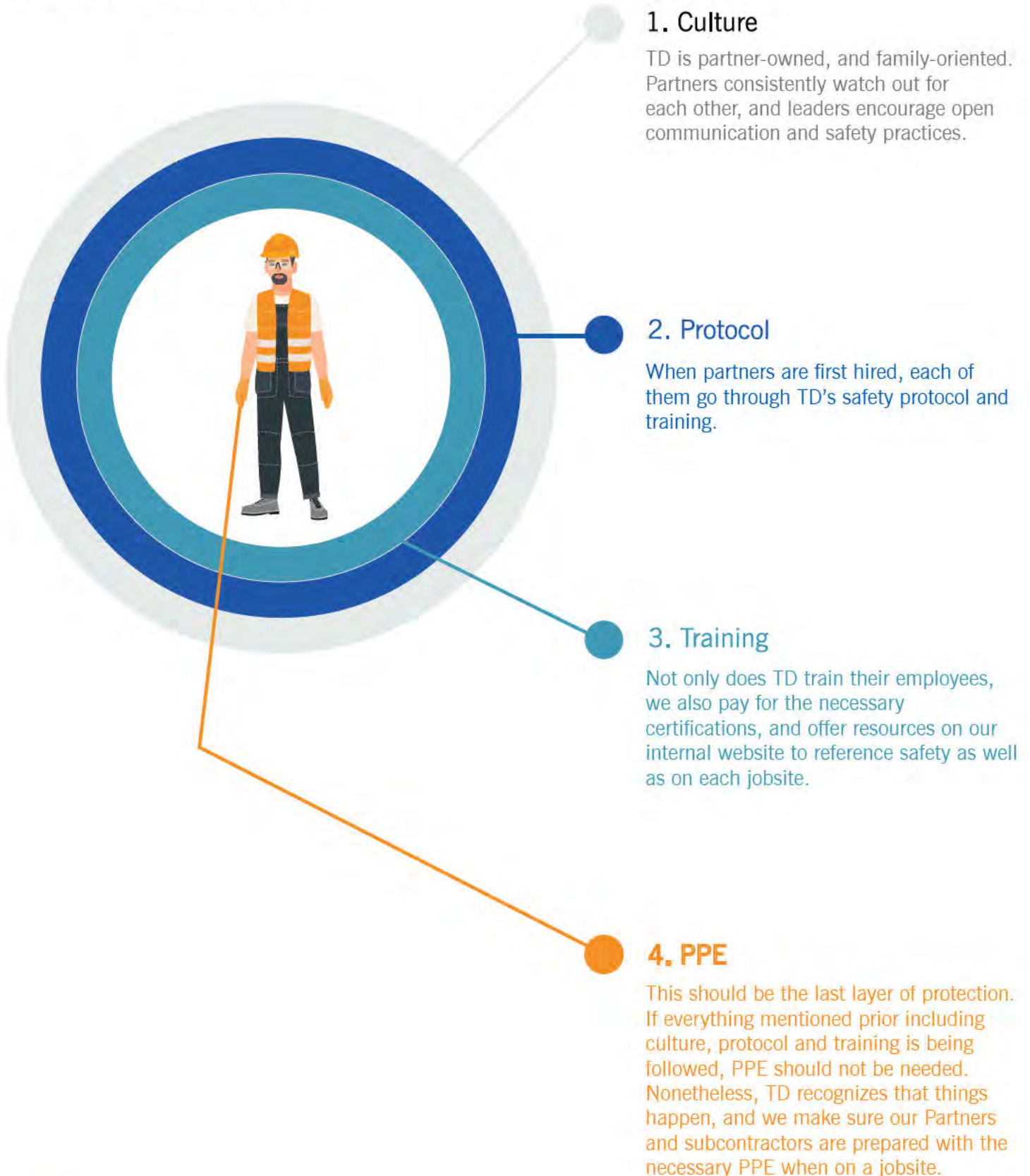


OSHA TRAINING



# WHAT IS THE VALUE OF TD'S SAFETY RESOURCES?

## LAYERS OF PROTECTION





# HOW DOES TD STAY UP TO DATE?

## SAFETY APP

TD teamed with application developer, SmartTagIt, to utilize a new real-time and integrated safety app to send notifications, share pre-task safety plans, inspections, observations, and safety alerts.

The system offers robust reporting and safety metrics. The alerts and observations include Partner feedback on their own severity-level rating of the condition or behavior observed.

### The safety app helps make TD's safety processes:

- » Easier to follow
- » More effective
- » More engaging

The app brings better awareness of hazards and improved planning. It is used by 900+ Partners, including all field leadership and up, plus all service technicians. Partners performing either safety inspections or safety observations have been provided SmartTagIt accounts.

### The app will also:

- » Manage the safety performance on all job sites
- » Fix hazards
- » Provide tools to stop unsafe working behaviors
- Engage in proactive safety processes consistently and often



Sample Pre-Task Safety Plan

## TD'S SAFETY MANUAL



## DIVERSITY PROGRAMS

*Do you currently have a diversity program or any diversity partners that you do business with? Yes No*

*(If the answer is yes, attach a statement detailing the structure of your program, along with a list of your diversity alliances and a copy of their certifications.)*

Valuing differences has always been one of TD's basic values. And that belief is practiced among our Partners, customers, suppliers and vendors, and within our community. TD understands that the diversity among us is our greatest strength and is critical to our continued success. Our CEO, Harold MacDowell, continuously strives for representation and inclusion at all levels of the organization. TD recognizes that diversity and inclusion are not only the right things to do, but are strategic pillars to achieving our success and growth for the future





*At the Heart of Your Building*

## Quality Assurance Plan

**Project Name:** NCPA Cooperative

**Project Number:** RFP #16-21

**Location:** Enterprise-wide

Document Date and Revision: 22-July-2021

## Table of Contents

CONCEPTS & POLICIES.....	3
QUALITY CONTROL /QUALITY ASSURANCE RESPONSIBILITIES.....	4
• The Senior Project Manager.....	4
• The Senior Superintendent .....	4
• The Quality Assurance Manager .....	4
PROCEDURES.....	5
1. PLANNING PHASE.....	5
• Spec Summary Sheet (SSS).....	5
• Project Planning Sessions.....	5
• Procurement .....	6
• Document Management.....	6
• Partner Qualifications .....	6
• Method of Procedure (MOP) .....	6
2. IN-PROCESS PHASE.....	7
• Equipment Verifications.....	7
• First Work.....	7
• Rough-in Inspections.....	7
• Self-Work Completion.....	7
• Subcontractor Quality.....	7
• Control of Nonconformances.....	8
• Pressure Testing.....	9
• Duct Leak Testing .....	9
3. CLOSE-IN INSPECTION PHASE.....	9
• Ceiling Close-In Inspections.....	9
• Wall Close-In Inspections .....	9
4. FINAL INSPECTION PHASE.....	10
TURNOVER .....	10
ATTACHMENTS.....	11

**CONCEPTS & POLICIES**

Quality consciousness in today's building industry has become an essential and valuable aspect of the construction process. TDIndustries stands firmly by our principles to provide the client with the highest quality and standards along with successful turnover of a project free from deficiencies. We understand the value of a proactive Quality Assurance/ Quality Control program and emphasize its importance as a vital contributor in ensuring client satisfaction.

Failures or defects during the installation process can result in a project burdened with large costs and delays, deflated morale, dissatisfied customers and can even result in personal injuries or fatalities. Our model of quality assurance is based on the TDIndustries values to Passionately Pursue Excellence and Build and Maintain Trusting Relationships. We view our quality culture as key to outstanding performance throughout the construction process. On any TDIndustries project, Quality comes second only to Safety.

TDIndustries maintains the Construction Process Manual (CPM) to define and communicate the processes, tools and lessons learned of carrying out a construction project from the beginning of a substantial lead to the turning over control of a site to the Owner. The CPM is supplemented by a project specific Quality Assurance Plan. This plan provides a systematic approach for defect prevention, quality measurement (inspection and testing) and concern resolution, to assure the achievement of project quality objectives. This plan is a living document that will mold itself to the project requirements and can also adjust to any changing of the project.

As an employee owned company, we are committed to fostering a spirit of pride that stimulates our creativity, powers our initiative, perfects our performance and strengthens our already strong sense of responsibility. While specific individuals have assigned tasks toward quality assurance and quality control on a project, ultimately it is the responsibility of all TD Partners involved.

**QUALITY CONTROL / QUALITY ASSURANCE RESPONSIBILITIES**

The responsibilities of the TDIndustries Project Team are to ensure the highest standards of workmanship are being employed and the project is installed skillfully, professionally and in conformance to project requirements and standards. This requires the team to be knowledgeable and informed of the project plans and specifications, materials and equipment being installed as well as applicable local, state and federal codes. In summary:

- **The Senior Project Manager** shall be responsible for assigning responsibilities to Project Managers in the areas of operations, document control and quality support. Together with QA/QC Partners, these individuals shall be responsible for implementing and maintaining conformance with the Quality Assurance Plan for the project.
- **The Senior Superintendent** shall be responsible for the performance of all work on site to be installed safely and per the quality expectations set forth in this plan.
- **The Quality Assurance Manager** shall be responsible for verifying and documenting the conformance of installed systems.
  - Monitor TDIndustries subcontractors for compliance to quality control procedures.
  - Review welding certificates and other applicable qualifications.
  - Witness and maintain documentation of system tests.
  - Distribute test reports, flush reports and all test documentation associated with project to TDIndustries Project Team and Customer's QA Manager as required. QA/QC documents should be filed so that they are available for quick accessibility by all members of the project team.
  - Create and administer internal punch lists. Track status of repair/rework and verify completion of punch lists prior to inspections.
  - Manage job site inspections. These includes preparing, performing and documenting inspections that may include: initial, preparation for final, and final inspections. Trade specific inspections may consist of wall close-ins, shaft close-ins, ceiling close-ins, floor close-ins, and equipment room inspections.
  - Maintain records of all discrepancy reports on the project and periodically review these items with project leadership and craftsman and respond accordingly.
  - Support project team by reviewing QC concerns brought forth by the customer, owner or other client parties. Coordinate discussions between all parties to ensure prompt resolution of issues.
  - Monitor quality of in-house pre-fabrication.

In addition to the above tasks, TDIndustries project team continually observe work in progress and address any installation methods that may lead to an unacceptable or inadequate product.



---

## PROCEDURES

The TDIndustries Quality Assurance process consists of four phases: **Planning Phase, In-Process Inspection Phase, Close-in Inspection Phase and Final Inspection Phase**. These phases are applied to the many mechanical, plumbing and piping systems that are a part of a large-scale construction project. The activities within these phases are described as follows:

### 1. PLANNING PHASE

Project planning never stops. Throughout the project, methods and activities to accomplish compliance with the project drawings and specifications for the project will be determined, performed and monitored for successful completion. Key quality assurance elements of TDIndustries planning process include:

- Spec Summary Sheet (SSS) is a summary of the chosen materials, including, but not limited to pipes, valves, fittings, and sheet metal. System materials are selected in accordance with the project drawings and specifications during the estimating process. These materials are further validated and defined once the project is initiated by the Project Manager and Superintendent. Trade specific means and methods are documented by the Superintendent prior to procurement of the materials.
- Project Planning Sessions is the planning method TD has developed in order to plan job progress and eliminate the negative effects associated with poor planning. It is a guide that provides structure, schedule, and accountability for complete project planning. There are several defined sessions, including trade specific and for startup. These may occur separately or jointly, depending on the type and duration of a project. Planning is started prior to construction and continues throughout the project. Typically, these meetings establish goals, review project drawings, specifications, submittals, the project Quality Control Plan, and serve to confirm that the entire Project Team is prepared to comply with the requirements of the contract documents. Below is a list of what may be expected at a TDIndustries Project Planning Session.
  - Advance review of the requirements relevant to the agenda.
  - Complete full review of all applicable construction drawings, specification sections, submittals, RFIs.
  - Identification of risks and development of mitigation plans.
  - Identification of specific inspection or testing requirements associated with the work. This may include hold points to review first in kind work.
  - Review of project schedules, inspection schedules and coordination of trades.
  - Review of safety requirements, and applicable Pre-Task Safety Plans as appropriate.
  - Review of TD Lessons Learned database for applicable learnings.

Upon completion of the review, all actions, issue resolutions and / or agreements made are

documented. Meeting minutes are distributed to the TDIndustries Project Team and other attendees. A critical part of all Planning Sessions is the follow up of all action plans that are developed. Actions are addressed and updated at succeeding Team meetings.

- Procurement – TDIndustries ensures that all materials, equipment, and subcontracted services are provided and installed in compliance with the plans and specifications for the project.
  - Materials and equipment suppliers will be selected and evaluated based on their ability to provide the specified materials and equipment in compliance with the plans and specifications, prior successful partnership and performance with TD, and service/technical support deliverability. Subcontractors will be evaluated based on prior service and ability to meet the installation requirements of this project.
  - After selection of an equipment/materials vendor or subcontractor, submittals will be prepared and forwarded to TDIndustries for review and comparison by the Project Manager to confirm compliance with the requirements of plans and specifications. Any clarifications or corrections required will be made prior to submission of the specific products to the Contractor.
    - ✓ A submittal log (through the appropriate means) will be monitored to ensure prompt and timely return/approval of submittals so delays in the work can be prevented.
    - ✓ The complete submittal packet as commented upon by the reviewing entity will be forwarded to the vendor/subcontractor for their review, action, and incorporation into the job files.
    - ✓ A copy of all approved submittals are provided to the Quality Assurance Manager for use in ensuring compliance as materials/equipment arrives on site.
- Document Management – TDIndustries ensures that relevant documents, such as plans, specs, drawings, and submittals that are required for project success and quality are available to TDPartners that need them. TDIndustries uses Autodesk BIM360 to deliver this information to our field partner’s hand-held technology, ensuring secure access to the most current approved information wherever they are on the job. Additionally, the 3D BIM model may be provided.
- Partner Qualifications – TDIndustries ensures TD Partners have the skills to perform their work to the applicable codes, specifications and TD requirements. Welding processes and operators are qualified in accordance with ASME Boiler and Pressure Vessel Code, Section IX.
- Method of Procedure (MOP) – TDIndustries ensures thorough consideration of the risks associated with performing work in critical or operating environments through use of a MOP. The intent is to perform all construction activities successfully without impact on our customers. A copy of the MOP template is attached.

## 2. IN-PROCESS PHASE

The in-process phase consists of monitoring installation activities and verifying they meet job specifications. TDIndustries has procedures including visual and physical examination of work in place, leak testing of ductwork, pressure testing of piping and plumbing systems, Quality issue creation and management, and red-line drawings for as-built drawing submittals. By monitoring construction work during installation, any issues are found as early as possible and prevented from recurrence by addressing their causes.

This monitoring process is guided by the use of Checklists within the BIM360 Field Management software module. Any observed irregularities, discrepancies, defects or deficiencies are exposed during this phase and immediately addressed prior to any subsequent inspections. The following actions occur during the in-process inspection phase:

- Equipment Verifications – TDIndustries staff will utilize Equipment Checklists to inspect equipment as it is delivered from the manufacturer. This will ensure that any potential issues are brought forward at the earliest possible opportunity rather than waiting for the installer of the equipment to find them at a later date.
- First Work is evaluated as defined during the planning phase. This includes inspections that verify the work plan from planning phase is being followed, and that quality and workmanship reflect the planning meeting requirements.
- Rough-in Inspections - TDIndustries staff will observe areas of work on a regular basis and verify that the basic scope of work is being installed in compliance with plans and specs and without irregularities.
- Self-Work Completion Review – Quality at the source is a powerful Lean tool practiced by TDIndustries. TD Partners are responsible for the quality of their own work. Field personal will visually check the following in their work area before reporting an area as completed.
  - Quality of installation
    - ✓ Installation meets criteria set forth in codes, specifications, TD workmanship standards, approved submittals and mock ups, when applicable.
    - ✓ Correct materials were used.
    - ✓ Supports are correctly sized, spaced, and installed.
    - ✓ Installations are clean and free of damage.
  - Openings are covered and/or protected from contamination.
  - Internal and external cleanliness of all systems.
  - Adherence to good housekeeping practices.
- Subcontractor Quality –TD QAQC monitors and assesses the acceptability of work performed by TD Subcontractor work. Subcontractors are required to perform work to all required codes and specifications, in addition to TD’s internal quality requirements/

- Control of Nonconformances – Should discrepancies or deficiencies occur in the quality of work, TD will systematically contain the issue and promptly review and make corrections as appropriate. These issues are documented and tracked in BIM360 Field Management as defined below. Each item will detail the condition found, the location, the associated trade, and the required completion date. Foreman or superintendents will arrange for the proper repair, replacement or rework to bring the material or workmanship into conformance. Should there be a need for customer approval, the Project Manager will formalize this through an RFI.

These items will be regularly reviewed in team meetings and monitored for resolution. Once the nonconformance is corrected, the item will be statused by the foreman or superintendent as completed, and reinspection will be performed by QAQC. Once successfully evaluated, QAQC will status the tracking issue as closed.

Fixing problems is not sufficient. TDIndustries systematically prevents recurrence of issues to ensure continual improvement in quality. TDIndustries uses a structured process to perform root cause analysis and to implement solutions. Solutions may involve a combination of enhanced process controls, training, upgrading of personnel qualifications, or improved processes.

- Quality Issues – These are found internally, while work is still in progress, and are items that are nonconforming to code, specification or workmanship guidelines. They may be found during quality walks or in-process inspection. They require cross functional review and resolution. Resolution may include rework, repair, or customer approval to leave in place. The intention is that early detection of issues will prevent items from becoming a Punch List item later in the project.
- Action Items – These are internal items needing attention by a member of the project team. They may be incomplete work, a clash with other trades, or damaged work. They are found internally during quality walks or in-process inspections and may be assigned to internal trade foremen or subcontractors for completion or to the Project Superintendent for resolution with other trades.
- Make Ready Needs – These are actions needing team attention that Items that directly affect schedule and/or critical path. These items may prevent work from being done if not addressed within the requested timeframe.
- Startup – These are equipment readiness items that prevent the proper startup of equipment. These may be triggered by the equipment specific checklists for startup.
- Warranty - work performed after turnover for the customer to address concerns in system or equipment performance or quality. This may be initiated by customer request, or as a follow on an existing concern.



External Punch Lists are addressed in the customer specified system, such as a project form, BIM360, Procore, etc. TDIndustries Quality Assurance Manager will review and evaluate all external Punch Lists or discrepancies published by client or owner. If there is disagreement in the validity of the item, the Quality Assurance Manager and/or others from the Project Team will discuss and reach a resolution with the publisher. TDIndustries recognizes these items must be resolved promptly to support project timelines. It is important to understand that Items to Complete should not be managed as discrepancies and are likely a reflection of work in progress due to the iterative nature of mechanical installations.

- Pressure Testing - TDIndustries QA/QC monitors the performance of all necessary and specified pressure testing of systems and will coordinate any required 3rd party witnesses. All leak detection and final pressure testing and inspections will be performed in accordance with technical specifications and contract documents, as well as TDIndustries procedures. The Sr. Superintendent shall approve and endorse each test based on available information. All pressure testing should be completed prior to shaft, wall, ceiling or floor close-ins. If testing before insulation or close in is not feasible, TD will work with the customer for any required RFIs or waivers. An example of the test report is attached.
- Duct Leak Testing – TDIndustries QA/QC monitors the performance of all required duct leak testing, which is performed per the industry guidelines established in SMACNA HVAC Duct Leakage Test Manual. Results are confirmed to be acceptable per the applicable specification or code.

### **3. CLOSE-IN INSPECTION PHASE**

Additional quality activities are performed at the close-in inspection phase. These typically include ceiling and wall close-ins. TDIndustries QA/QC will examine TD work, documenting any discrepancies in internal punch lists and verifying completion of work prior to scheduled inspection dates. Issues found at this time will become Internal Punch List Items as described above. Timeliness of review and completion of re-work is essential so that project delays do not occur. Readiness for closure will be indicated by a color coded marking on the studs or ceiling grids. Approved work will be documented by photograph. The following details are specific to each type of close in:

- Ceiling Close-In Inspections – Where mechanical or piping systems are located above ceilings, TDIndustries will verify that all systems are installed per current contract drawings, specifications and approved changes. The intent of this inspection is to ensure that all work is tested and installed in a satisfactory manner prior to installation of finished ceilings. This may include but is not limited to hanger spacing, hanger sizes, repairs to insulation, access to valves or equipment, vents and low point drains, identification, fire damper access, filters, valve tags and caulking.
- Wall Close-In Inspections – Where mechanical or piping systems are located inside walls, TDIndustries will verify that systems are installed per the contract drawings, specifications

and approved changes. The intent of this inspection is to confirm that all work being covered up by a finished material is tested and installed in a professional manner. This may include but is not limited to support spacing and sizes, access to valves and/or equipment, correct rough-in dimensions for fixtures, required clean-outs with proper access and completed insulation.

#### **4. FINAL INSPECTION PHASE**

The last phase of the inspection process is the Final Inspection Phase. Preparations and pre-final inspections precede and verify the readiness of an area or system for final inspection and acceptance by the customer and/or the owner.

- TD Industries Startup Team verifies equipment readiness for the Testing Adjusting and Balancing subcontractor. TD Industries will utilize internal pre-commissioning checklists to verify the readiness of equipment and systems for TAB as well as commissioning. While performance of commissioning may be outside the scope of work for TD Industries, the TD Industries Project Team is fully committed to supporting this very important phase of construction as needed.
- TD QA/QC performs pre-final inspections where work is evaluated for completion to required specifications and codes. TD QA/QC uses BIM360 Field Management to track and ensure that items have been completed and accepted prior to the scheduled final inspection.
- TD Quality Manager will walk with the Customer and/or Owner's Quality Assurance representative for the Final Inspection to illustrate that the work is complete and ready for acceptance. The intent is that the applicable area will be signed off and accepted for project turnover. Photographs of the condition of the completed and approved work may be made for record purposes.

TD Industries works to achieve Zero Punch List at time of substantial turnover. Any damage, defects or deficiencies the owner or client exposes during the Final Inspections will be addressed with urgency. The TD Industries Quality Assurance Manager will take the punch list published by client or owner and manage it as an External Punch List item as described previously. All External Punch List items identified at time of substantial completion will be incorporated into the BIM360 Field Management tracking system, and will communicate the issues to the TD Industries Project Manager, and TD Quality Director, as well as the appropriate superintendent and foreman for repair or correction.

### **TURNOVER**

TD Industries wants the final turnover to demonstrate and accentuate our dedication to quality, value and partnership with our customers. The benefits of our commitment to quality execution and system performance, combined with years of "lesson learned" assure that proper quality is implemented early on, and throughout the project.

**ATTACHMENTS**

*To be defined by project team:*

BIM 360 sample checklists

TD-NTXC Above Ceiling Checklist

TD-NTXC Quality Walk Checklist

Pressure Test Report

MOP Template



*At the Heart of Your Building*