

## Appendix D – RFP Particulars

### 1. The Deliverables

1.1. ISI is requesting proposals for the service and maintenance to Elevators.

#### 1.2. Scope of Work

- a. The Proponent shall:
  - i. Provide all labour, and materials necessary to provide full preventive maintenance, adjustment, replacement, and repair service for all vertical transportation systems for those of the Member’s buildings subject to this agreement as listed in the attached **Appendix C – Part Two – Volume Report and Rate Bid Table**.
  - ii. As per the legislation, examine all safety devices and perform all safety tests as required by any National, Regional, or Local codes, regulations or bylaws.
  - iii. Periodically test, adjust, and maintain all programming and software associated with the operation and maintenance of the vertical transportation systems.
  - iv. Submit annually to the Member, in electronic format, a summary of major repairs and replacements completed at each building by each lift. This summary shall consist of all tasks which are considered other than routine preventive maintenance or adjustment, details of the work performed, and all costs associated. Include a list of capital upgrades to meet any code requirements necessary for the next twelve-month period at no additional charges.
  - v. An E-Service report shall be generated and forwarded electronically to each member institution’s contact after the completion of any service work performed on any elevator. This report should be forwarded within five (5) business days **at no additional charges**.
  - vi. The logbooks shall be provided **at no additional charges**.
  - vii. Maintain at its expense an inventory of genuine manufacturer’s parts in both the Proponent’s local and regional warehouses and at each building, including such items as door operating equipment, controller switches and parts, solid state units, selector tapes and drives, door hangers, brake magnets, limit switches, rectifiers and other spare or replacement parts deemed necessary for continuity of service.
  - viii. Renew all wire ropes as often as is necessary to maintain an adequate factor of safety, equalize the tension on all hoisting ropes, and repair or replace cables as

required by prudent operating and maintenance practices or by elevator inspectors having jurisdiction.

- ix. Special attention must be given to proper protection and barricades while performing maintenance/service work at the Member's properties. This includes properly locking and securing elevator machine room doors, access doors to elevator shafts and pit areas.
  - x. Provide assistance and access to the Member, or Member's representative(s), to test, repair or replace any equipment located in the hoistway and not accessible to persons other than the elevator Supplier (e.g., smoke detector or electrical outlets). The supplier shall coordinate with the Member when the technician schedules his route for services in order to avoid any extra cost to the Member. This assistance is to be provided during regular working hours.
  - xi. Condition report to be submitted, as required, for license renewals **at no additional charges**.
  - xii. Provide a complete survey of elevators within one (1) month of the signed contract.
  - xiii. Provide an Occupational Health and Safety type Risk Assessment Report on the expected work to be completed as part of maintenance activities at the start of the contract **at no additional charges**, and provide a Risk Assessment Report prior to completing any major capital replacement work outside the maintenance activities **at no additional charges**.
- b. The Proponent shall:
- i. Maintain, clean, repair, or replace hoist machines (and all components of the hoist machines), rotating electrical equipment, controller parts, microprocessors, integrated circuits, printed circuit boards, brake coils, brake linings, door operating equipment, pumps, motors, pistons, gland packing, hydraulic fluid, door equipment, handrail(s), safety switches and all other mechanical and electrical parts required for the operation of the elevators or lifts, not including buried piping and buried cylinders.
  - ii. Maintain in the building, in which the vertical transportation systems are located, a standard steel storage cabinet with an adequate supply of spare parts for emergency service in the machine rooms or designated locations, at all times. These emergency parts will include but are not limited to: fuses for each size as used on controllers, selectors, and disconnects, springs and contacts for all relays, switches and interlocks, parts for car door sheaves, generator brushes,

signal lamps, bulbs and bases, emergency stop switch, selector contacts, general lubricants and cleaning materials. Such parts and cabinets shall remain the property of and shall be kept secure by the Proponent.

- iii. Regularly and systematically examine and adjust, clean and lubricate the elevator(s) and lift(s) including (but not limited to) the components and systems listed below:
1. **Elevating Device(s):** including worm gear, thrust bearings, drive sheave shaft bearing, armatures, shoes, springs, drums, linings, brake coil, brake linings and components, brake pulley, couplings, flexible mountings and cable sheaves.
  2. **Motor and Motor-generators:** including relays, resistors, windings, commutators, brush holders, brushes, bearings, exciters, tacometers, contacts, coil leads, transformers, timing devices and solid state components;
  3. **Dispatching Equipment:** including relays, resistors, car and hall push buttons, contacts, coil leads, transformers, timing devices, solid state components, and time clocks for peak periods;
  4. **Selector:** including electrical or mechanical drive components, cams, cards, sockets, timing and computing devices, transistors, contacts, relays, resistors, leads, transformers, solid state components and steel selector tape;
  5. **Governor:** including sheave, bearing, shafts, contacts and governor jaws;
  6. **Car:** including power door operator, door protective devices, car door hangers, car frame and car door guides, car door contacts load weighing equipment, car safety devices, car guide shoes including roller guides, gibs, cab exhaust fans, emergency car lighting and sub-flooring;
  7. **Safety stopping devices:** jaws, bearings, equalizing mechanisms, plank switches, linkage, speed governors, tripping assembly, overspeed switches, and tension sheaves;
  8. **Hoistway:** including deflector sheave, secondary sheaves, buffers, governor tension assemblies, guide rails, limit switches, compensating sheave assemblies, compensating chain or cables, travelling cables, hoistway/wellway and machine room wiring, hoistway door interlocks, hoistway door hangers and gibs, auxiliary closer, counterweight and counterweight guide shoes;
  9. **Accessory Equipment:** including all accessory elevator equipment installed prior to commencement of this Agreement unless specifically excluded in this Agreement; and
  10. **Hydraulic pumps and motors:** belt drives, valves, pilots, strainers, mufflers, timers, plungers, guide bearings, packing and packing glands.
- iv. In performing the above indicated work, the Supplier agrees to provide only genuine parts used by the manufacturer of the equipment for replacement or

repair, and to use only those lubricants obtained from and/or recommended by the manufacturer of the equipment.

- v. The Proponent shall on a regular basis, for hydraulic elevators, check the oil level in the reservoir tank and the hydraulic system for possible reduction of oil level. If there is an unexplained reduction in the oil level, proper testing shall be carried out immediately to determine the cause of the loss and report provided to the Member.
- vi. The Proponent shall maintain on-site a copy of the drawings, specifications and wiring diagrams reflecting the current condition of the elevators. The Proponent shall, during the term of the Contract, reflect any changes made by the Proponent to the vertical transportation systems.

### **Routine Maintenance**

- c. The Proponent shall perform the following routine maintenance:
  - i. Perform the following duties as described in the aforementioned;
  - ii. In the course of the examination, should faulty parts be discovered, replace them at once, and should any unusual operations or noises be found, take corrective action immediately;
  - iii. Parts showing excessive wear should be replaced during the next regular examination.
- d. The Proponent will provide routine maintenance examinations as follows:
  - i. At least once a month for a gearless machine.
  - ii. At least once a month for a geared machine.
  - iii. At least once a month for a hydraulic machine.
  - iv. At least once a month for a dumbwaiter.
  - v. At least once every 3 months for a stair chair lift, stair platform lift, vertical platform lift.

### **Extra Work Not Included**

- e. The Proponent shall not repair or replace the car enclosure (including car ceiling lights), handrails, floor coverings, hoistway enclosure, hoistway door and frame finishes, door sills and security systems. Although the proponent has the duty to report back to the Members in a timely manner if they identify any deficiencies.
- f. The Proponent is not expected to do refinishing, cleaning, repair or replacement of cab and door panelling, handrails, floor and floor covering, door frames and sills, illumination lamps and ballasts, intercommunication systems, buried piping and hydraulic jack cylinder, main disconnect switches and their fuses or circuit breakers,

emergency power transfer switchgear, and ventilation fans. Accessory equipment unrelated to normal elevator operation is not the responsibility of the Proponent.

- g. The Proponent shall submit to the Member proposals for repair or replacement of parts damaged by malicious action of others or for alterations and additions not covered by the maintenance contract, including obsolescence of parts and/or equipment. The Member must be satisfied that such parts and/or equipment are not available from other suppliers.
- h. The Supplier is not responsible to cover parts due to vandalism, misuse, acts of God, electrical voltage fluctuations, retrieval/replacement of keys/re-keying or any other cause beyond the Supplier's control.
- i. This agreement does not include the making of test, additions or modifications, to the elevators as may be required by governmental authorities or independent third parties after the contract is signed.
- j. Emergency service outside regular working hours is not included in the contract price. An emergency shall be deemed to exist if passengers are trapped or if more than 50% of the elevators in any one group are out of service.

#### **Safety Devices**

- k. At no time will the Proponent permit the vertical transportation systems to operate while any of the safety devices (mechanical or electrical) are inoperative.
- l. In the event that any of the emergency safety devices such as final limits, safety operated switches, governor switches, overspeed devices, underspeed devices, car safeties, are activated while the vertical transport systems are in use by the public, the Supplier shall submit a written report to the Member detailing the incident and the corrective action taken in a timely manner.

#### **Mis-Adjustment**

- m. The Proponent shall not:
  - i. Change any of the elevator adjustments in such a way as to lead to a de-rating of the performance without written consent from the Member.
  - ii. In particular, but without limitation, shall not:
    - 1. Increase the door dwell times without written instructions from the Member, but shall provide the Member with written advice and

- instructions, if the Supplier's employees think that the door dwell times need to be increased;
2. Decrease the door operating speed;
  3. Change the brake spring setting;
  4. Change the brake lift setting;
  5. Decrease the acceleration;
  6. Decrease the deceleration;
  7. Decrease the contract speed;
  8. Change the peak clock settings and/or pre-programmed timing;
  9. In the course of routine maintenance or trouble shooting, re-adjust any of those settings which affect the performance of the equipment.
  10. Allow *ad hoc* adjustments to the equipment.
- iii. Should it appear that some setting has changed, or some problem has arisen such as to alter the performance of the equipment, the Proponent shall arrange that a qualified adjuster with the appropriate tools, manuals, and training will make the necessary re-adjustments in an organized, systematic way.

#### **Major Parts Replacement and Repair**

Any major parts replacement and repair must be quoted, and Members reserve the right to tender the work above the Member's threshold. The quote may not be required under emergency conditions; however, the Supplier must obtain the Member's approval before proceeding.

- n. When replacing an SCR (Silicon Controlled Rectifier) the Proponent shall ensure that:
- i. The date, time and reason of component failure is noted in the log;
  - ii. The replacement SCR is at least equal in current carrying capacity to the original part;
  - iii. The replacement SCR is at least equal in peak inverse voltage rating to the original part;
  - iv. The new component is installed in accordance with the manufacturer's instructions using, as required, heat sink compound and the correct torque on the mounting device;
  - v. The replacement SCR is compatible with the other SCRs in the same bank.

#### **Solid State Control Device Replacement**

- o. When replacing a solid-state control device the Proponent shall ensure that:
- i. The date, time and reason of component failure is noted in the log;
  - ii. The replacement solid-state control device is at least equal in current carrying capacity to the original part;
  - iii. The replacement solid-state control device is at least equal in peak inverse voltage rating to the original part;

- iv. The new component is installed in accordance with the manufacturer's instructions using, as required, heat sink compound and the correct torque on the mounting device;
  - v. The replacement solid-state control device is compatible with the other solid state control devices in the same bank.
- p. When replacing ropes the Proponent shall:
- i. Use rope terminations of the wedge clamp type;
  - ii. Provide hoist ropes of sufficient number, size and characteristics such that, with the car level at the bottom floor, the removal or addition of 50% of the rated load will cause no more than a 0.5 inch change in car level;
  - iii. Where ropes are used in parallel to share a load, ensure that the ropes are all from one manufacturing run;
  - iv. If Lang's Lay rope is used, provide means during and after installation to prevent the ropes turning (do not use swivel connections);
  - v. Provide sufficient removable counterweight buffer blocking to allow adjustment for rope stretch without requiring cable shortening.

## 2. Material Disclosures

### 2.1. Member institutions:

**2.1.1.** The following is a list of ISI Member institutions. Any one institution, any combination, or all of the below may be active participants in the ensuing agreement. Member institutions may be added, or deleted, as requirements may change throughout the contract period.

- 2.1.1.1.** Acadia University, Wolfville, NS
- 2.1.1.2.** \*Atlantic School of Theology, Halifax, NS
- 2.1.1.3.** Cape Breton University, Sydney, NS
- 2.1.1.4.** Dalhousie University, Halifax, NS and Faculty of Agriculture, Truro, NS
- 2.1.1.5.** Holland College, Charlottetown, PEI
- 2.1.1.6.** Memorial University of Newfoundland, St. John's, NL
- 2.1.1.7.** Mount Allison University, Sackville, NB
- 2.1.1.8.** \*Mount Saint Vincent University, Halifax, NS
- 2.1.1.9.** \*NSCAD University, Halifax, NS
- 2.1.1.10.** Nova Scotia Community College, Various locations throughout NS
- 2.1.1.11.** \*Saint Mary's University, Halifax, NS
- 2.1.1.12.** \*St. Francis Xavier University, Antigonish, NS
- 2.1.1.13.** \*St. Thomas University, Fredericton, NB
- 2.1.1.14.** \*Université de Moncton, Moncton, NB
- 2.1.1.15.** Université Sainte-Anne, Church Point and Halifax, NS
- 2.1.1.16.** University of Kings College, Halifax, NS
- 2.1.1.17.** \*University of New Brunswick, Fredericton Campus, NB
- 2.1.1.18.** \*University of Prince Edward Island, Charlottetown, PEI

\*Institutions who initially indicated their interests to participate in this agreement are marked above with an asterisk.

## 2.2. Participation of Eligible Public Sector Entities

- 2.2.1. The Supplier agrees to make the specified goods and/or services available to any public sector entity eligible to participate in this procurement process upon request. This obligation to allow participation by other public-sector entities does not extend to circumstances in which the Supplier would have to make capital or operational expenditures in order to accommodate subsequent requests for goods or services by public sector entities.
- 2.2.2. Participation by an eligible public-sector entity with an executed adoption agreement will have their volume and account activities reviewed at the end of each contract year during the term of this Framework Agreement.
- 2.2.3. The volume purchased by a public-sector entity will be included in the total purchase volume used to calculate any threshold price change. The Supplier will provide all applicable reporting (at the same intervals and format) for all participating public sector entities.
- 2.2.4. For the purposes of this section, a public-sector entity means any provincial government or provincially funded entity in Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador, including municipalities, universities, community colleges, school boards, health authorities, housing authorities, agencies, boards, commissions, and crown corporations.

## 3. Mandatory Submission Requirements

- 3.1. Submission Form (**Appendix B**; must be in **PDF** format)
  - 3.1.1. Each proposal must include a Submission Form (Appendix B) completed and signed by an authorized representative of the proponent.
- 3.2. Pricing (**Appendix C** – Part Two – Volume Report and Rate Bid Table; must be in **Excel** format)
  - 3.2.1. Each proposal must include pricing information that complies with the instructions contained in Appendix C – Part One – Pricing Instructions.
- 3.3. Each proposal must include responses that follow the same structure and numbering system as outlined in Appendix D RFP Particulars – Section 5. Rated Criteria (**Appendix D**; must be in **Word** format).
- 3.4. References and Project History (**Appendix E**; must be in **Word** format)
- 3.5. Other Mandatory Submission Requirements
  - 3.5.1. A Certificate of Commercial General Liability insurance for third party bodily injury, personal injury and property damage, to an inclusive limit of not less than \$5,000,000 per occurrence and including products and completed operations liability. Each institution may require to be listed as Additional Insured. (must be in **PDF** format)
  - 3.5.2. Workers Compensation Certificate of Good Standing. (must be in **PDF** format)
  - 3.5.3. A Safety Letter of Good Standing from the Nova Scotia Construction Safety Association or an equivalent organization for NB and PEI. (must be in **PDF** format)
  - 3.5.4. A Safety Plan developed by the Proponent. (must be in **PDF** format)
  - 3.5.5. A copy of the Proponent's certified Maintenance Control Program. (must be in **PDF** format)



**Important Note:**

Each proposal (**Appendix D**) must not exceed **twelve** (12) pages in **font size 10**; if the Proponent attaches any sample reports, resumes, they will be counted as part of the page limitation. This page limitation excludes any appendixes, insurance, certificates, and other supporting documents requested in this RFP. If your response is beyond the requested page limitation, the rest of the content will not be read / evaluated by the Evaluation Committee.

**4. Mandatory Technical Requirements**

- 4.1.** The Supplier shall provide maintenance service in accordance with **the A17.1/CSA B44/2019 Safety Code for Elevators & Escalators & CSA-B55 Lifts for Persons with Physical Disabilities code** that is in affect at the time of the commencement date of this agreement.
- 4.2.** The Supplier acknowledges and agrees that the Member is relying on the skill and expertise of the Service Provider in the provision of the Services. As such, the Supplier shall perform the Services in accordance with the level of skill and standard of quality expected of service companies in the industry and in accordance with any and all applicable Codes and qualifications as required by the applicable provincial legislation in the Province in which the work is to be performed.
- 4.3.** The Supplier must have an established system for fully documenting maintenance procedures performed, service calls received and answered and major repairs scheduled and completed.
- 4.4.** The Supplier must have an effective system of self-audit mechanism to ensure designated tasks are completed as scheduled, with the ability to provide written condition report covering each elevator. The condition report submission timeline must comply with Members' individual timeframe. E.g., For University of New Brunswick, requires the condition reports to be submitted during May and August; all reports must be submitted no later than October 1.
- 4.5.** The Supplier must be able to provide spare parts for repair or each unit materials. Parts to be used must be original manufacturer's renewal parts or parts approved by the participating Member. The Supplier shall maintain an up-to-date inventory of commonly replaced spare parts used by participating Members.
- 4.6.** The Supplier shall comply with all National, Provincial, and Municipal Safety requirements while on ISI participating Members' campuses.
- 4.7.** The Supplier shall comply at all times with the COVID-19 safety protocols in place while on ISI participating Members' campuses.
- 4.8.** The Supplier and any approved subcontractors must be registered with the Workers' Compensation Board (WCB), in which case WCB coverage must be maintained for the duration of the resulting contract and any option periods (if applicable).
- 4.9.** Service Level Requirements:
  - 4.9.1.** Services must be available **24 hours** per day, **seven days** per week.
  - 4.9.2.** For non-emergency situations, ISI Members request **24 hours** response time or the next business day, depending on the Member's specific request.
  - 4.9.3.** For emergencies, ISI Members request a **two-hour** responding time, and **one-hour** responding time for the entrapments.
- 4.10.** **Volume Usage Reporting:**

**4.10.1.** The Supplier will be responsible for providing volume reports to ISI reflecting the individual transactions of the participating members. These reports shall be sent to ISI semi-annually. January 1st through June 30th (inclusive) will be due August 15th and July 1st through December 31st (inclusive) will be due February 15th. The information shall be provided in an Excel format and shall be transmitted electronically. Failure to do so may result in cancellation of the agreement.

**4.11. Key Performance Indicators (KPI):**

**4.11.1.** The Supplier will be responsible for providing Key Performance Indicator reports to ISI reflecting the Key Performance measures requested by ISI and agreed to by the Supplier. These reports must be sent to ISI semi-annually. January 1st through June 30th (inclusive) will be due August 15th and July 1st through December 31st (inclusive) will be due February 15th. More frequent reporting may be required during the implementation period or to address a specific performance objective. The failure to provide these reports shall constitute a substantial failure of performance and may result in the immediate termination of the contract.

**4.11.2.** At minimum the KPI report shall include the following:

- 4.11.2.1.** Average responding time to service calls during regular working hours;
- 4.11.2.2.** Average responding time to emergency service calls during and outside regular working hours;
- 4.11.2.3.** Total number of service calls per elevator (for both normal service calls and the emergency calls);
- 4.11.2.4.** Average elevator uptime per Member;
- 4.11.2.5.** Percentage of billing accuracy, cause of billing adjustment, and corrective actions taken.

**4.12. Pre-Conditions of Award**

**4.12.1.** The successful Proponent is to outline any modification or addition to the Terms and Conditions contained within **Appendix A – Form of Agreement**, alterations should be marked on the document.

**4.12.2.** Successful Proponent will submit all legal documents which would require participating members' sign off for review. All other documents need to be binding to the Framework Agreement and any contradictory terms are not permitted.

**4.12.3.** Proponents must identify any binding agreements in place with any Member for the provision of the deliverables that could impede that Member from participating in any agreement that may result from this RFP. For agreements identified Proponents must also detail the process for those Members to cease that agreement to be eligible to participate in any agreement resulting from this RFP. If not listed, ISI will deem there to be no such agreements in place with Members.

## 5. Rated Criteria

- 5.1. The following sets out the categories, weightings, and descriptions of the rated criteria of the RFP. Stage I, II and III will be completed and the top two or three Proponents will move on to Stage IV. ISI may choose to do either Reference checks, Interviews, both or neither. The top ranked Proponent will receive a written invitation to enter direct contract negotiations to finalize the agreement with ISI.
- 5.2. The award will be based on a review of proposals against all evaluation criteria and will not necessarily be awarded based on the lowest price offered.

Rated Criteria Category	Weighting
<b>Stage I: Mandatory Submission Requirements</b>	<b>Pass/Fail</b>
<b>Stage II: Evaluation</b>	
Company Profile and Qualifications	10
Local Support Structure and Experiences - <b>Appendix E</b>	20
Implementation Plan and Exit Plan	10
Billing and Payment	2
Price Management Mechanism	10
Service Repair Work and Parts not covered under the Monthly Full Maintenance Program	10
Value Adds	5
Additional Rated Criteria (clarity, completeness, and confidence level)	3
<b>Stage III: Pricing – Appendix C – Part Two</b>	
- Monthly Full Maintenance Program Fee	30
<b>Total</b>	<b>100</b>
<b>Stage IV: Ranking and Contract Negotiations</b>	
References	20
Interview	30
<b>Total</b>	<b>150</b>

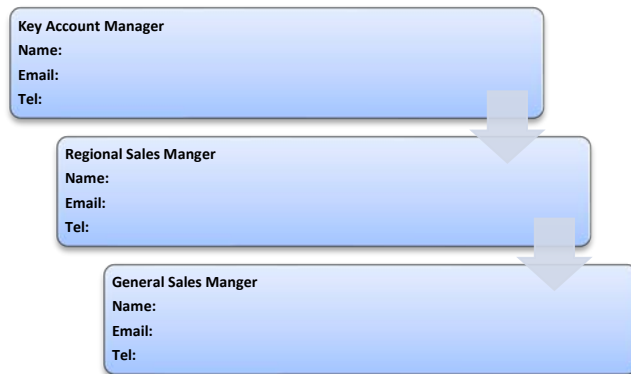
### 5.3. Company Profile & Qualifications

- 5.3.1. Detail the corporate profile and qualifications which would enable the Proponent to successfully provide the services requested in the RFP.
- 5.3.2. Describe your experience providing elevator maintenance to other public entities of varying size and functionality (e.g., universities, hospitals, etc.).
- 5.3.3. Describe how the Proponent will secure the parts to avoid inventory shortage and mitigate the risk of the price increase.
- 5.3.4. Explain how the Proponent addresses proprietary parts and specialty software from other brands.
- 5.3.5. Elaborate on how the Proponent can mitigate this risk if the parts are obsolete.

5.3.6. Provide your written COVID-19 policy/procedures for when your service team conduct work on client’s site.

**5.4. Local Support Structure and Experiences**

- 5.4.1. Provide a list of the key personnel that would be performing the services for ISI participating Members and briefly outline their experiences in this field.
- 5.4.2. Assigned Account Managers’ biographies are required to demonstrate their capability to manage the scope of this RFP. Outline the scope of current contracts undertaken by the assigned Account Managers. Outline what changes would be implemented to balance the new workload of the Account Managers if awarded this contract.
- 5.4.3. Appendix E will be used to assess the proponent’s previous experience providing a similar scope of work.
- 5.4.4. Fill in the flow chart below describing the Proponent's escalation process demonstrating its capability to resolve issues in a timely manner. The positions listed below are for demonstration purpose. The Proponent should update them accordingly.



5.4.5. Outline if the Proponent can provide bilingual services for the French speaking campuses.

**5.5. Implementation Plan and Exit Plan**

- 5.5.1. Outline the proposed Implementation Plan by adapting the Project Management approach to assist Members. Ensuring an effective transition occurs from their existing provider to the new Proponent. Major timelines required for each step outlined in this plan should be clearly indicated.
- 5.5.2. Outline the timeframe required to set up contract pricing and customer account information in the Proponent’s system. The Proponent must establish unique customer / account identification numbers for use by each participating Member at no additional charges.
- 5.5.3. Current incumbent shall collaborate with ISI Participating Members and transfer all historical data from the previous year to the Members within 30-day’s notice to ensure a smooth transition at no additional charges. Also, if there are any outstanding deficiencies for Members’ fleet, the incumbent shall provide the report to the Member at the end of the agreement or anytime if the agreement is terminated. Please confirm if the Proponent is in agreement with this request.

- 5.5.4. Describe details regarding Exit Plan including how the data would be made available to the Participating Members when a change in Suppliers occurs.

#### 5.6. Billing and Payment

- 5.6.1. Define your capability of billing customization.
- 5.6.2. The Supplier should accept payment by cheque, P-Card, Visa Payable Automation or Electronic Funds Transfer at no additional charges. Please confirm if you are in agreement with this request or specify if there are any deviations/inabilities to provide this level of service.
- 5.6.3. Members standard payment terms are net thirty (30) days. Different payment terms may be agreed to when executing the Adoption Agreement. Please confirm if you are in agreement with this request.

#### 5.7. Price Management Mechanism

- 5.7.1. Price for the Monthly Full Maintenance Program Service Fee proposed in **Appendix C – Part Two**, the labour rates proposed in **Section 5.8.1.**, and the Service Surcharges proposed in **Section 5.8.3.** shall be fixed for the **first two contract years** of the ensuing agreement. Please confirm if you are in agreement with this request.
- 5.7.2. For the third contract year, any price increase proposed by the Supplier **must not exceed 2%** per contract year. Please confirm if you are in agreement with this request.
- 5.7.3. For the two three-year option periods, the Proponent is requested to propose your price review mechanism.
- 5.7.4. Any price review proposed by the Supplier must include rationale and must be accompanied by supporting documentation. (i.e., manufacturer's letter, detailed calculations and individual Member impact analysis, third party industry reports) to support any price adjustment. Please confirm if you are in agreement with this request.
- 5.7.5. ISI will not consider any fixed costs, Foreign Exchange Rate fluctuations or overhead adjustments in the price review. Please confirm if you are in agreement with this request.
- 5.7.6. If a proposed price review was agreed upon between ISI and the Supplier, the new price would only be applicable to Members' billing after the effective date of the new rates. The effective date of the rate change must allow Members a minimum of **thirty calendar days** prior notice. Please confirm if you are in agreement with this request.
- 5.7.7. Decreases to the net rate shall be accepted at any time during the term of the agreement. Please confirm if you are in agreement with this request.

#### 5.8. Service Repair Work and Parts not covered under the Monthly Full Maintenance Program.

- 5.8.1. Complete the following hourly rate tables which will form part of the resulting agreement.

The labor rates will be used for service repair work **not covered** under the Monthly Full Maintenance Program.

For clarity's purpose, the definitions of various rates are listed below:

**Regular Working Hour Rate:** 8 am to 5 pm; Monday to Friday inclusive.

**Overtime Hourly Rate:** 5:01 pm to 7:59 am; Monday to Friday inclusive.

Saturday and Sunday Rates shall be the same as the Overtime Rates.

Holiday Rate shall be for all Statutory Holidays.

<b>Fixed Mechanic Rate</b>	<b>November 1, 2021 - October 31, 2023 (CAD\$)</b>
Regular Working Hourly Rate (Excluding HST)	
Overtime Hourly Rate (Excluding HST)	
Holiday Rate (Excluding HST)	

<b>Fixed Helper Rate</b>	<b>November 1, 2021 - October 31, 2023 (CAD\$)</b>
Regular Working Hourly Rate (Excluding HST)	
Overtime Hourly Rate (Excluding HST)	
Holiday Rate (Excluding HST)	

**5.8.2.** For parts not covered by the Monthly Full Maintenance Program, provide the guaranteed mark-up for these parts. The percentage of mark-up shall remain fixed for the contract duration. It may be reviewed and negotiated during the option negotiation process. Fill in the Price Formula below:

**Part's cost + \_\_% mark-up**

**5.8.3.** List all Service Surcharges not covered by the Monthly Full Maintenance Program by filling in the table below. You can add more lines if needed.

<b>Service Surcharge Description</b>	<b>Fixed Price for the First Two Contract Years (CAD\$)</b>	<b>Comments</b>
e.g., Hoistway unlocking devices		

**5.9. Value Adds**

- 5.9.1.** Provide any details that you may consider as having value added as it would apply to this RFP.
- 5.9.2.** Proponents are invited to propose additional percentage discounts if total cumulative participating volumes (by all Ordering Entities) exceed an amount specified.
- 5.9.3.** Proponents are invited to propose any prepayment option discount offers for the resulting agreement. For example, a certain percentage discount will be applied if the Member chooses to pay the single, annual invoice within 30 business days, issued at the commencement of the contract year, or if the Member chooses to pay twice, semi-annual invoices within the agreed timeline with the Supplier.
- 5.9.4.** Describe how you would onboard new elevator purchases when the warranty / initial service period is completed.
- 5.9.5.** Proponents are invited to propose any discount offers for either new construction installations or elevator modernizations awarded to the Proponent.
- 5.9.6.** If Members have another long-term shutdown during the contract term and option periods, what can the Supplier do to help Members achieve cost reduction, meanwhile still comply with legislation requirements? E.g., rotating the units in the same building; thus, the Supplier can provide a discounted rate due to reduced maintenance frequency, fewer service calls, etc.

**5.10. Additional Rated Criteria**

- 5.10.1.** Response will also be evaluated on the following:
  - 5.10.1.1.** Clarity and conciseness of Proponent's response;
  - 5.10.1.2.** Completeness of the Proponent addressing all requested information as per the instructions;
  - 5.10.1.3.** Confidence in the Proponent's ability to meet the requirements as outlined.