

CONTRACTING FOR FACILITIES SERVICES

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ASSOCIATE DIRECTOR -
CONSTRUCTION AND RENOVATION
SERVICES
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Have a question or comment?
Feel free to ask or share
during the presentation

2

TODAY WE WILL COVER

- In-house vs. Outsourcing
- Types of Contracts
- Bidding

3

Why contract/outsource?

4

Outsourcing Discussion

- Problems with in-house service delivery
- Reduced costs
- Quality of work
- Managing a contract operation is easier

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Operational · Managerial · Fiscal

Reaction to crisis or economic pressure

6

Management approach to improve

- Quality of customer service
- Fiscal performance
- Resource utilization

7

In-house Performance vs Contracting for Services

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Group Activity

At your tables, list:

- 1-2 advantages of keeping services in-house
- 1-2 advantages to outsource

9

In-house Advantages

- Continuity
- Staff loyalty and dedication
- Flexibility in staff utilization
- Emergency response capability
- Lower costs (sometimes)
- Responsiveness
- Quality of work/pride
- Security
- Mutual Trust
- Customer Interaction
- Organizational Cohesiveness
- Knowledge transfer

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Contract Advantages

- Avoid capital costs
- Obtain specialized or infrequently required services
- Meet peak workload demands
- Lower costs (sometimes)
- Obtain management resources of a large, specialized organization
- Volume purchasing power
- Avoid inventory requirements
- Eliminate support space requirements
- Greater flexibility in adjusting to changing service level needs
- Avoid personnel management requirements

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Contracting Considerations

- Public/private
- Procurement delegation
- Urban/rural
- Union/non-union
- Economic climate

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Contracting Facilities Management Services

1 3

Operations & Maintenance Services

- Grounds maintenance
- Snow removal
- Custodial Services
- Pest Control
- Transportation services
- Refuse collection and disposal
- Paving
- Painting services
- HVAC services
- Elevator maintenance and inspection
- Asbestos abatement
- Facilities and equipment PM and maintenance services
- Plant operations
- Management of a particular function or operation
- Management of entire Facilities Management function

1 4

Discussion

Institutions that have tried and/or currently outsourcing their contract services

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Value: *attributed or relative worth, merit or usefulness*

- Financial
- Logistical
- Quality
- Ethical
- Collaborative
- Customer satisfaction
- Trust
- Importance
- Timeliness

1 6

5 MIN BREAK



1 7

Contract

An agreement between two or more persons or parties to do or not to do something.

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Essential Elements of a Binding Contract

- An agreement (offer and acceptance)
- Voluntarily entered into
- By parties having capacity to contract
- Supported by consideration
- To do legal acts or acts

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Basic Documentation

- Specific goods or services to be provided
- Required performance and quality
- Delivery requirements and schedule
- Consideration to be paid and related terms or conditions

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Contractual Procurement Procedures

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Competitive Bidding (IFB)

- Compete solely on basis of price
- Award to responsive and responsible contractor with the lowest offer

2 2

Competitive negotiation (RFP)

- Qualitative evaluation
- Negotiate on basis of specific selection criteria
- May or may not include price
- Mandatory/preferred terms

2 3

RFP Score Sheet

2 4

Negotiated or "Sole Source" contract

- Direct negotiation with single vendor
- Justification required in public sector

2 5

Defining Contractual Requirements

MUST DEFINE

- What we want
- How much
- Standards of quality & performance
- When

CAN DO THIS BY:

- Plans/specifications
- Statement of performance objectives or standards
- General statement of requirements

2 6

Obtaining Offers

- Advertisement
- Solicitation
- Pre-bid /pre-proposal meeting
- Addenda
- Type of offer

2 7

Formal Contract

- Plans and/or specifications
- Request for bid/proposal document
- Contractor's offer/proposal
- Bonds
- Terms or conditions negotiated following selection of contractor

2 8

Contract Management

- Contract Administrator
- Pre-performance conference
- Inspection procedures
- Performance incentives/penalties
- Payment
- Claims and disputes procedures
- Renewal procedure

2 9

In-house services

PERCEIVED ADVANTAGES

- Loyalty
- Dedication
- Commitment
- Continuity
- Responsiveness
- Flexibility
- Quality
- "Corporate knowledge"

PERCEIVED DISADVANTAGES

- "It takes too long"
- "It costs too much"
- "My neighbor is a _____ and he could have done it in half the time"

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To be successful, an institution's decision process needs to be ...

- Performed within the context of the institution's mission and culture
- Seen as a strategic choice
- Consultative and inclusive of customers, functional area specialists and administrators
- Able to qualitatively and quantitatively define the institution's requirement for the functional area's performance
- Balanced and cognizant of all management/operating alternatives

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At the end of the day...

"Only the provision of a service can be contracted for, not the responsibility for it".

"In the eyes of the consumer, the ultimate accountability will always rest with the institution."

3 2

- There *is* a contract alternative
- Understand the advantages and disadvantages of the alternatives
- Understand contracting principles
- Recognize perceptions/seek reality
- Inject competition

3 3

BREAK

3 4

Maintaining, Renovating, Restoring and Preserving Historical Properties

3 5

TODAY WE WILL COVER

- Various definitions of "historic"
- Efficient use of space
- Difference between renovation, restoration, preservation and maintenance
- Current historic restorations on the Lawn

3 6

VARIOUS DEFINITIONS OF "HISTORIC"

DEFINITION OF HISTORIC PROPERTY FROM SECRETARY OF THE INTERIOR STANDARDS

A district, site, building, structure or object significant in American history, architecture, engineering, archeology or culture at the national, State, or local level.

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UVA's "Historic" Structures

3 8

Evaluation Methodology

One goal of the Historic Preservation Master Plan was to develop a ranking of historic structures and landscapes which lists them with respect to their importance to the University's historic development and character.

To establish the list, an approach was developed which allowed all of the resources to be judged in a consistent manner.

This required understanding how the building or landscape fit within the history of the University and included an interior and exterior survey of each building or landscape and an evaluation of the buildings or site's integrity.

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Definitions

- Fundamental
- Essential
- Important
- Contributing
- Not-contributing

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Ranking

Based on the information gathered, each building and landscape was assessed and assigned a preservation priority – a ranking identifying the resources level of importance in terms of the University's historic character. The priorities are divided into six groups:

- Fundamental to University history and present character, which applies exclusively to the Jefferson building and Grounds.
- Essential to University history and present character.
- Important to University history and present character.
- Contributing to University history and present character.
- Not Contributing to University history and present character.
- Significant outside the University context.

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BUILDINGS BY PRESERVATION PRIORITY[illegible][illegible]

42

EFFICIENT USE OF SPACE

4 3



OLD CABELL HALL
SECRETARY OF STATE
JOHN F. KERRY

4 4



OLD CABELL HALL
DALAI LAMA

4 5



**OLD CABELL HALL
FM TOWN HALL MEETING**

4 6



4 7

**DIFFERENCE BETWEEN
RENOVATION
RESTORATION
PRESERVATION
MAINTENANCE**

4 8



PAVILION X & THE ROTUNDA

5 2



ROTUNDA

5 3



ROTUNDA

5 4



O'NEIL HALL

5 5



O'NEIL HALL
NEWLY RENOVATED

5 6



O'NEIL HALL
INTERIORS



5 7



**PAVILION III
COLUMNS**

5 8

BUILDING WITH LIME



5 9

History

Limes have been used in buildings for at least 7000 years, since at least 5000 B.C. Evidence of remaining structures and ruins we know that the Romans developed lime technology around 2000 years ago. Achievements of medieval cathedrals and castles were dependent upon lime technology.



**IT IS ESSENTIAL TO UNDERSTAND
BUILDING LIMES FOR THE PROPER
REPAIR AND HEALTH OF OUR
HISTORIC STRUCTURES.**

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Limes vs. Cements (OPC)

L I M E

- Strength (like for like)
- Vapor permeability
- Autogenous healing
- Flexibility
(accommodates movement structural as well as thermal and seasonal)
- Environmentally friendly (reabsorption of Carbon dioxide CO₂)

C E M E N T

- Hardness
- Non-vapor permeable
- Soluble salts production
- Rigid
- Entrapment of moisture thus causing greenhouse affect producing Unhealthy Building Syndrome

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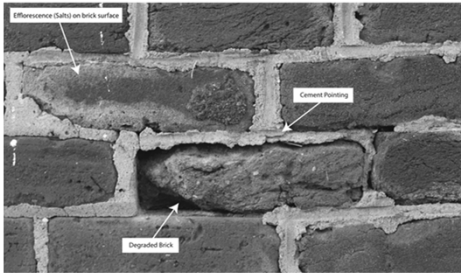
Examples

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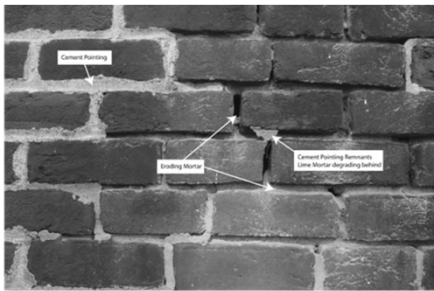
EAST RANGE
REPOINTING AND REMOVAL OF CEMENT MORTAR

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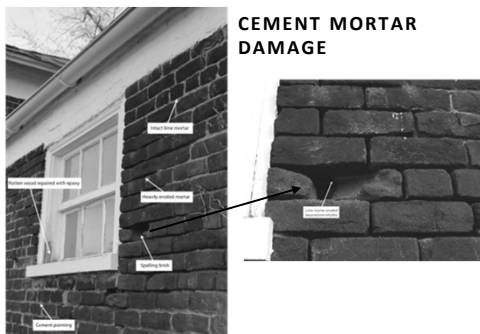
CEMENT MORTAR

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CEMENT MORTAR DAMAGE

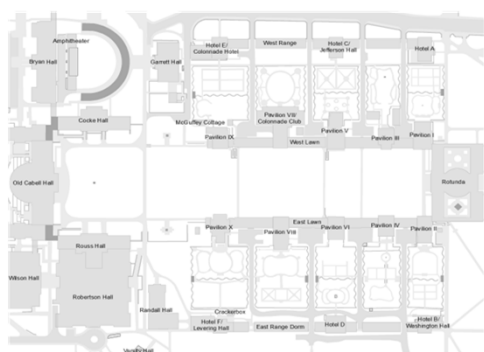
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Historic Restorations & Renovations on the Lawn

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PAVILION III
BEFORE RESTORATION – TUSCAN COLUMNS

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**TUSCAN
COLUMN
RENOVATION**

EAST LAWN STUDENT ROOM
COLonnADE BETWEEN PAVILION VIII
AND IX.
REMOVAL OF CEMENTITIOUS AND
PAINT COATINGS.

7 1



**TUSCAN
COLUMN
RENOVATION**

EAST LAWN STUDENT ROOM
COLonnADE BETWEEN PAVILION VIII
AND IX.
REMOVAL OF CEMENTITIOUS AND
PAINT COATINGS.

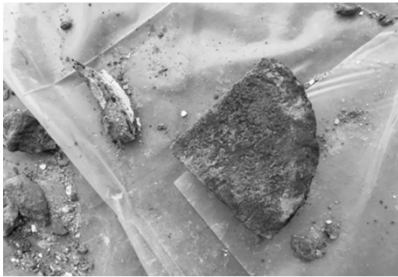
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TUSCAN COLUMN RENOVATION

EAST LAWN STUDENT ROOM
COLONNADE BETWEEN PAVILION VIII
AND IX
REMOVAL OF CEMENTITIOUS AND
PAINT COATINGS

7 3



TUSCAN COLUMN RENOVATION ORIGINAL WOOD – MOLDED BRICK

7 4



TUSCAN COLUMN RENOVATION

ORIGINAL BRICK COLUMN
CEMENT PLASTER HAS BEEN
COMPLETELY REMOVED

7 5



TUSCAN COLUMN RENOVATION
STONE BASE BEFORE REMOVAL OF PATCHING AND COATINGS

7 6



TUSCAN COLUMN RENOVATION
TUSCAN SAND STONE BASE AFTER REMOVAL OF COATING AND MODERN PAINTS. LOCAL SANDSTONE WAS USED TO CARVE THE ORIGINAL BASES.

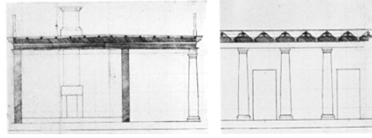
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TUSCAN COLUMN RENOVATION
WOODRUP PHOTOGRAPHERS JACE MANN, TIM PROFFITT, LANCE NOTHOUSE AND ROBERT GALT REPAIRED THE 200-YEAR-OLD TUSCAN COLUMNS THAT LINE THE LAWN WITHIN THE ACADEMICAL VILLAGE.

7 8

Pavilion Roof & Railing



History

AN IMPORTANT ASPECT OF THOMAS JEFFERSON'S DESIGN FOR THE ACADEMICAL VILLAGE IS THE INCLUSION OF THE COLONNADE CONNECTING THE TEN PAVILIONS ON EITHER SIDE OF THE LAWN, WHICH PROVIDES WEATHER PROTECTION TO THE WALKWAYS. BENEATH, ORIGINALLY, THE COLONNADES WERE COVERED WITH WHAT JEFFERSON CALLED A "TERRAS ROOF," AN INTRICATE SYSTEM OF TAPERED JOISTS AND SERRATED FRAMING TOPPED WITH A DECK AND RAILING THAT PROVIDED A WALKWAY BETWEEN THE SECOND FLOOR ENTRANCES TO THE PAVILIONS WHILE ALSO ACHIEVING THE DESIRED AESTHETIC EFFECT OF A FLAT ROOF ABOVE THE DORMITORIES.

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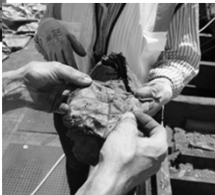


ROOF AND RAILING
BEFORE RENOVATION

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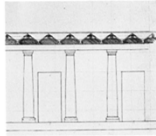


ROOF AND RAILING
BEFORE RENOVATION



ROOF AND RAILING
ARTIFACTS

8 1



ROOF AND RAILING
ORIGINAL ROOF



8 2



ROOF AND RAILING
ORIGINAL ROOF

8 3



ROOF AND RAILING
MASONRY REWORK



8 4



ROOF AND RAILING
ROOFING AND DECKING



8 5



ROOF AND RAILING
RAILING RENOVATION

8 6



ROOF AND RAILING
RAILING FABRICATION

8 7



ROOF AND RAILING
BEFORE (TOP) AND AFTER (BOTTOM)

8 8



ROOF AND RAILING
COMPLETED ROOF AND RAILINGS

8 9



ROOF AND RAILING
TEAM MEMBERS INCLUDED STAFF FROM PROJECT SERVICES (CARPENTERS, MASONS, ...) AND FACILITIES PLANNING & CONSTRUCTION (HISTORIC PRESERVATION)

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Questions and/or comments?

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THANK YOU

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