



Soliciting Service Contract Bids

We discussed in this Focus On Facilities what a planned maintenance (PM) work order should look like and we went through a sample work order explaining the standardized checklist of things to do when maintaining a piece of mechanical or electrical equipment. That said, quite often a building owner will not have the luxury of a computerized maintenance management software (CMMS) system to help assist in the operation and maintenance management of the building. There may not even be a maintenance technician assigned to the building beyond the services of a custodian whose focus will be to keep the building clean, with limited experience or skill to operate and maintain the mechanical and electrical systems beyond turning up or down a room thermostat or replacing light bulbs.

For purposes of this article, “owner” and/or “building owner” shall include pastors, administrators, principals and presidents.

Another skill level not available in this building may be a certified technician qualified to perform PM work on equipment such as that associated with the refrigeration system or the domestic hot water heater unit.

When a building owner is faced with personnel not trained in operation and maintenance, or the building has equipment that require more expertise than even a skilled maintenance person may have, then the solution is to contract the services of a qualified mechanical and/or electrical service company to deliver the required PM work needs.

In the November 2018 issue of Focus on Facilities we discussed, “What to Request Before Receiving a Maintenance Company’s First Invoice.” This month we broke out how a PM order can be formatted to identify the specific equipment, the pre-maintenance requirements, and the actual maintenance tasks. A service company, to assure the building owner that all this necessary work is being done, should use this PM



work order format that inventories the tasks document as if it was being done in-house. For the building owner, as well as the service company, the uses of such PM work orders can be considered quality control checklists. The things-to-do don’t change whether an in-house technician or a service contractor’s technician does the work and so the process should be the same.

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With completed work order documents, the service company supervisor can spot check the company’s service technician(s) to be assured their company is doing a thorough job. At the same time, the building owner will have a historical record of each piece of mechanical and electrical equipment serviced and maintained upon receipt of the completed PM work order(s).

It is well documented that when equipment receives regular maintenance this routine initiative will contribute to maximizing the useful equipment service life of the

equipment. Analogous to changing the oil in one's automobile engine, if this isn't done on a regular basis the engine probably won't last as long as it would if the engine was serviced on a regular basis. Heating, ventilation, and air-conditioning (HVAC) systems have several moving parts, and these parts can wear over time if not cared for. For example, if bearings aren't lubricated as recommended by the equipment manufacturer then the life of these bearings serving fan shafts, pump shafts, etc. will eventually fail.

Air filters are engineered to collect and they do their job, but at some point filters can collapse and fail if the dust collection load becomes too dense. Again, the technician may be in-house or an outside service contractor, the same PM process needs to be done on a scheduled basis or based on an automated filter alarm from the HVAC system's automatic control safety device.

These are just a couple examples why equipment has to be serviced. When the maintenance becomes complicated, such as servicing an air-conditioning compressor or a gas-fired condensing boiler, then a qualified service firm should be contracted to perform this work. When a company is brought in to perform this work, the building owner needs more than just a tag tied to a piece of equipment stating the equipment was serviced on a specific date, and filters were changed or that the boiler exhaust temperature is within range and there are no carbon monoxide leaks noted on the tag. This is why a building owner needs more assurance than the good name and reputation of the service company. The service contractor needs to produce a copy of the completed PM work orders when submitting the work invoice.

A building owner should recognize that the action-reaction of a service contractor's technician performing the work is to require the company well in advance of calling for service to require the collection of the completed PM work orders. Just like the PM work order tasks completed in-house produces important information for the owner to keep on record such as the frequency of certain tasks completed as part of the building's asset management records, the service company should also provide the tasks completed as part of the company's service contract agreement. Otherwise the building owner should solicit another firm to do the work in accordance with the owner's request-

for-bid requirements. These additional completed work orders will then be inputted into the owner's asset management records.

In years to come and when the building owner begins to think about selling the building, this asset record keeping can become very useful as a means to demonstrate how well the equipment has operated because this equipment was well maintained. At the same time, the building owner can feel comfortable that all the right steps had been taken for this "life-line for building performance" and assure this equipment can be reliable over the years.

So from a building management point-of-view and from an asset management point-of-view, it is important that mechanical and electrical equipment receive proactive, planned maintenance and that the maintenance doesn't go without proper documentation. When hiring a service contractor for the primary mechanical and electrical equipment planned maintenance the contract should clearly state that all work shall be completed using pre-approved work order document(s) and that this documentation gets included with the service company's invoice to the building owner to be used for asset record keeping.

For a list of pre-qualified service contractors that have a good history working with the Diocese of Cleveland, contact a member of the Diocese of Cleveland Facilities Corporation.

For more information:
facilities@dioceseofcleveland.org

