

## PERFORMANCE-BASED TENDER & QA INSPECTION SERVICES – HIGHER EDUCATION



**UMass  
Boston**



The University of Massachusetts is the five-campus public university system and the only public research system in the Commonwealth of Massachusetts. The university system includes five campuses (Amherst, Boston, Dartmouth, Lowell, a medical school in Worcester and a law school in Dartmouth), a satellite campus in Springfield and 25 additional campuses throughout California and Washington with the University of Massachusetts Global. UMass Boston is the only public research university in Boston, the third-largest campus in the University of Massachusetts system, and the third most diverse university in the United States. The UMass Boston Campus encompasses 10 unique building types with approximately 1.8M sf of space, not including student housing.

### BACKGROUND

In 2018, UMass Boston (hereafter 'UMB') commenced in earnest their janitorial services outsourcing initiative to further upgrade the quality of their currently provided janitorial services and move from a traditional custodial task maintenance service delivery model to a performance matrix operations model. Since this service was already being provided under contract, UMB engaged Elliott to guide the development of that performance-based Scope of Work, prepare for them an Initial Cost Estimate (ICE), assist UMB's procurement team in their tendering process, including evaluation of each performance-based design proposal, and upon final contract award, operate as UMB's quality assurance consultant.

### CLIENT OBJECTIVES

- Comply with all UMB procurement guidelines
- Ensure all required janitorial & facilities services workstreams meet UMB's financial, service delivery, best practices goals and diversity guidelines
- Minimize any potential disruption to UMB's user population
- Create a performance-based SOW that may be used as a framework for other University of Massachusetts' school locations
- Formalize all aspects & engagement components related to the solicitation, tender and award of Janitorial Services that can also serve as a template for future tender initiatives.

### STRATEGY

The Janitorial Services tender initiative represented one of UMB's initial service streams intended to transition UMB away from a *task / frequency* to an *outcome-based* Scope of Work, principally because the Boston campus' cleaning services were already being provided under contract (as opposed to 'in-house'). Elliott's Tender Consulting program included the following steps: establish & quantify UMB's overall janitorial services program objectives (via a Focus Group study), complete a detailed review & integration of all related UMB tender documentation, update UMB's infrastructure documentation describing the physical environment within which janitorial services are to be performed, establish & adhere to all required tender protocols & engagement documents, pre-qualify (via Survey Monkey) all prospective bidders, perform an Initial Cost Estimate (the 'ICE', based on UMB's required performance objectives), assist with their COMMBuys (through the State of Massachusetts) contract tender process, establish final cleaning system Design Proposals evaluation criteria, analyze the efficacy of each bidder's Design Proposal, and provide an assessment of that Design Potential for delivering each of UMB's required outcomes.

## THE PROCESS

- Simplify the entire tender process, ensuring confidentiality and objectivity
- Review, update & incorporate all existing physical environment plans
- Define all required SOW services in specific measurable terms
- Define the contract “deliverables” (the outcomes for performing a specific service or workstream) in measurable terms
- Create all contract SOW engagement documents in concert with UMB’s Facilities, Legal & Procurement teams
- Create clear, measurable KPIs that are directly tied to the successful bidder’s compensation
- Incorporate requirements for quantifiable “best practices” in bidder Design Proposals
- Incorporate requirements for “continuous improvement” processes and “deliverables” in bidder Design Proposals
- Standardize all RFP submission deliverables & protocols (ensuring objectivity in evaluating of each bidder’s design proposal) via COMMBuys
- Create an objective, empirical methodology for bidder design proposal evaluation
- Provide detailed evaluation of all bid submissions with a final best proposal recommendation

## RESULTS

In concert with UMB’s Unified Procurement Services Team (UPST), Elliott shortlisted five (5) prospective bidder design proposals for final review based on each bidder’s perceived Best Overall Value. This RFP was structured to facilitate an objective comparison of UMB’s incumbent contractor against any prospective new contractor in order to allow a final decision based solely on the best contractor *and* the best program. Two primary categories formed the basis of UMB’s evaluation, namely the bidder’s proposed Technical Program (twelve formal categories were evaluated) and the bidder’s Final Proposed Price.

Following a shortlisted bidder in person interview process and BAFO bid submissions, the incumbent contractor C&W Facility Services, Inc. was retained. UMB substantially improved their contract SOW, created an objective, measurable performance standard, and reduced their annual cleaning contract cost ~\$500K / year. This final price was slightly higher than the best case (lowest) initial cost estimate established in Elliott’s ICE. Over the three initial year term of this contract UMB estimates saving ~\$1.3M.

## SUMMARY

Because this approach established clear, objective & measurable expectations as to ongoing and sustainable cleanliness of specific items within specific room types, coupled with a formal, rigorous quality inspection program tailored specifically to UMB’s required ‘outcomes’, and included Elliott’s third party reporting identifying where cleanliness defects occurred as well as whether the root cause was related to the cleaning system or an individual cleaner, all stakeholders were able to collaboratively determine a solution that allowed the contractor to not only achieve the required levels of performance, but also regularly earn their performance incentive. The success of this program may provide the University of Massachusetts system with a roadmap for improving the overall performance of their janitorial services across all five campuses.



**About Elliott Affiliates, Ltd.**

Elliott Affiliates, Ltd. (EALTD) is an active provider of janitorial consulting, advisory, inspection, and performance management services. Founded in 1973, we were one of the earliest developers of the performance-based cleaning strategy and have reviewed, created, or modified over 530 of these contracts over the years. Elliott Affiliates, Ltd. is a chartered Maryland corporation and a 100% woman-owned business (WBE).

- [Elliott's RFP/Bid Advisor](#): Provides buyers with a range of services spanning the RFP process.
- [Elliott's eSpecX](#): Makes it easy to create a custom cleaning program, optimized for your best results in minutes.
- [Elliott's EA-Inspect](#): Provides custom inspection service app to monitor and improve the performance of your cleaning program.

**To schedule a free consultation, please email us at [project-admin@ealtd.com](mailto:project-admin@ealtd.com)**

