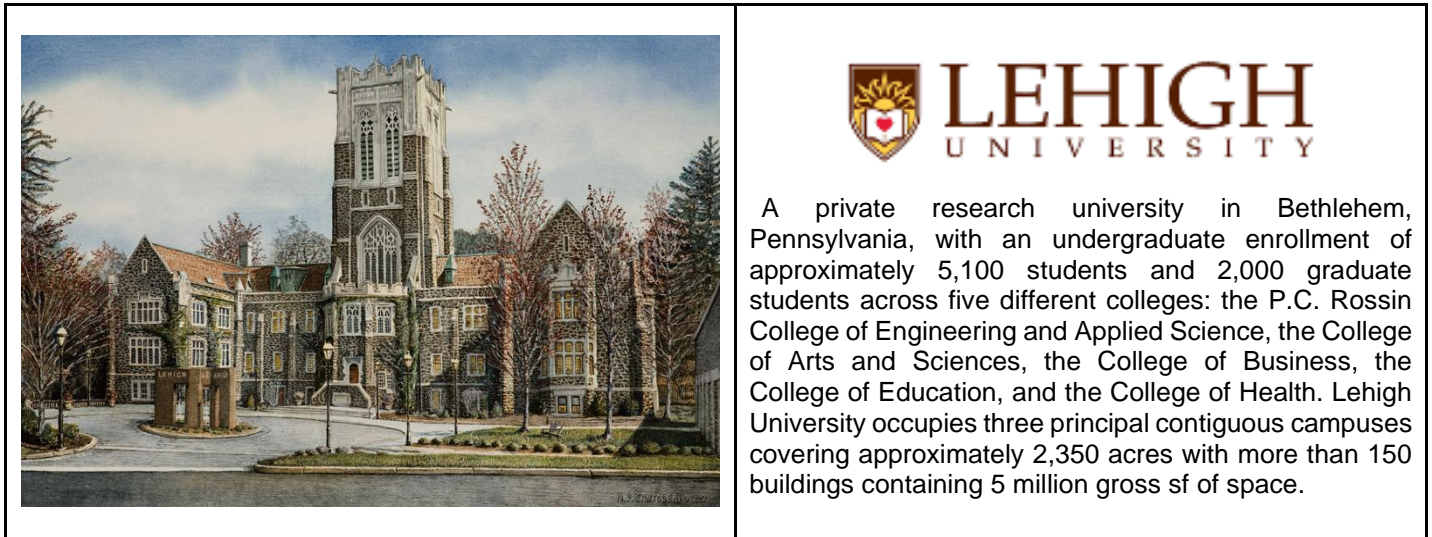


PERFORMANCE-BASED CONTRACT TENDER INITIATIVE – HIGHER EDUCATION



A private research university in Bethlehem, Pennsylvania, with an undergraduate enrollment of approximately 5,100 students and 2,000 graduate students across five different colleges: the P.C. Rossin College of Engineering and Applied Science, the College of Arts and Sciences, the College of Business, the College of Education, and the College of Health. Lehigh University occupies three principal contiguous campuses covering approximately 2,350 acres with more than 150 buildings containing 5 million gross sf of space.

BACKGROUND

Lehigh University’s procurement guidelines require all major contracts to be periodically retendered to ensure the University receives the best value for their contract spend. Over the last three years the University constructed or renovated a number of key facilities on the Bethlehem campus and also wanted to update the services covered by their Janitorial and Facilities Services contract. This outsourcing initiative addressed both of these objectives.

CLIENT OBJECTIVES

- Comply with Lehigh procurement guidelines
- Ensure all required janitorial and facilities services workstreams meet the University’s financial, service delivery and best practices goals
- Minimize any potential disruption to the entire University user population

STRATEGY

Elliott’s 9-Step Tender Consulting program begins with a review of each client’s objectives. It includes a detailed review of all related documentation for each client tender initiative, and updating the infrastructure documentation, tender protocols and required engagement documentation. Elliott facilitates contractor pre-qualifications, performs an Initial Cost Estimate (the ‘ICE’, based on each client’s required performance outcomes), and guides the entire tender process, including stakeholder participation protocols, analysis of the efficacy of each bidder’s recommended cleaning program(s), and provides an assessment of each bidder’s potential to deliver a client’s required results. Elliott’s detailed ICE forecasts the anticipated range of costs each client may expect from their tender initiative based on their specific marketplace and required SOW.

THE PROCESS (IN CONJUNCTION WITH LEHIGH)

- Review the existing physical environment plans
- Update the facilities list to include new buildings and removed buildings when necessary
- Update all required SOW services
- Update “the deliverables” (the activity of performing a specific service or workstream)
- Update all contract engagement documents with Lehigh’s Legal Team

- Create clear, measurable KPIs that can be directly tied to a contractor’s compensation
- Standardize all RFP submission deliverables & protocols (ensuring objectivity in evaluating of each bidder’s design proposal) via Elliott’s Client Portal link (www.ealtd.com)
- Simplify the entire tender process, ensuring confidentiality and objectivity
- Streamline the bid evaluation process
- Establish quantifiable “best practices” requirements into each bidder’s design proposal
- Establish required “continuous improvement” processes and “deliverables” requirements into each bidder’s design proposal

RESULTS

Lehigh’s RFP was structured to facilitate an objective comparison of its incumbent provider against any prospective new contractor to allow a final decision based solely on the best contractor *and* best program. Key factors considered were: proposed service delivery program, including best practices and compatibility with Lehigh’s strategic objectives, efficacy of proposed equipment program and total overall design program cost. Below are select highlights that contributed to Lehigh’s final decision:

- Using Annihilare hypochlorous acid and PURETi Clean Fresh leading edge cleaning solutions
- Expanding eMobility program with electric vehicles and electric charging stations
- Using Elliott’s Quality Assurance (QA) App to aid ‘real time’ alignment of work and required outcomes
- Facilitating Stakeholder alignment by formalizing objective, measurable required outcomes
- Ensuring total contract costs aligned with Lehigh’s approved budget

SUMMARY

Elliott’s PBC tender process	Elliott’s Initial Cost Estimate (ICE)
Complemented Lehigh’s overall objective to update all related infrastructure documents, provided a more formalized engagement agreement, and continued advancing one of the University’s strategic objectives by incorporating more environmentally responsible equipment in the delivery of required recurring services.	Prepared at the beginning of Lehigh’s tender initiative, forecasted an aggregate total cost that was 0.1% less than the selected bidder’s proposal. Although Lehigh’s SOW included a 2% increase in total cleanable square feet, the 2023 contract cost increase on a cost per square foot basis for Lehigh’s expanded scope of services was only 4.8%.
<i>Lehigh incorporated in their new agreement the ability to transition the new janitorial and facilities services agreement to a full performance contract, ensuring their selected contractor remains highly focused on delivering Lehigh’s required outcomes.</i>	

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

