

**COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT**

Contract Number: LU214-18-012

This contract entered into this 14th day of December 2018 by The Budd Group, hereinafter called the "Contractor" and Commonwealth of Virginia, Longwood University hereinafter called the "Purchasing Agency."

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From March 1, 2019 through December 31, 2020.

The contract documents shall consist of:

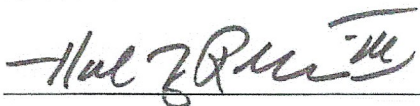
- (1) This signed form;
- (2) The following portions of the Request for Proposals dated May 25, 2018:
 - a. The Statement of Needs;
 - b. The General Terms and Conditions together with any negotiated modifications of those General Terms and Conditions;
 - c. The Special Terms and Conditions together with any negotiated modifications of those Special Terms and Conditions;

Addendum 1, dated June 7, 2018;
Addendum 2, dated June 15, 2018;
Addendum 3, dated June 22, 2018;
Addendum 4, dated June 29, 2018;
Attachment 1, dated October 29, 2018; and

- (3) The Contractor's Proposal dated July 16, 2018; and the following agreement, all of which documents are incorporated herein.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

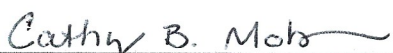
CONTRACTOR:

By: 

Title: CAO
(Print or Type Name and Title)

Date: 12/14/2018

PURCHASING AGENCY:

By: 
Cathryn B. Mobley, designee in the absence of
M. Louise Waller

Title: Interim Vice President for Administration & Finance

Date: 12/14/18

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS: The eVA Internet electronic procurement solution, web site portal www.eVA.virginia.gov, streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet e-procurement solution by completing the free eVA Vendor Registration. All bidders or offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the bid/proposal being rejected.

Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

- a. For orders issued July 1, 2014, and after, the Vendor Transaction Fee is:
 - (i) DSBSD-certified Small Businesses: 1%, capped at \$500 per order.
 - (ii) Businesses that are not DSBSD-certified Small Businesses: 1%, capped at \$1,500 per order.
- b. Refer to Special Term and Condition "eVA Orders and Contracts" to identify the number of purchase orders that will be issued as a result of this solicitation/contract with the eVA transaction fee specified above assessed for each order.

For orders issued prior to July 1, 2014, the vendor transaction fees can be found at www.eVA.virginia.gov.

The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, typically within 60 days of the order issue date. Any adjustments (increases/decreases) will be handled through purchase order changes.

NEGOTIATIONS
for
RFP#LU214-18-012
Custodial Services

Attendees: For Longwood University (Longwood)
M. Louise Waller, Interim Vice President for Administration and Finance
Cathryn B Mobley, Associate Vice President for Administration and Finance
Angela R. Stimpson, Executive Director, Facilities Management
Deborah J. Cooper, Buyer Specialist/Contracts Administrator

For The Budd Group (Budd)
Joe Budd, Chief Executive Officer
Jon Larsen, Chief Operating Officer
Katie McConnell, Business Development Manager

Negotiations were conducted at Longwood University on this date. The following points were provided to Budd in advance of the meeting.

1. It has come to the University's attention that there were properties both on and off campus that were either included in the RFP in error, excluded in error or the cleaning frequency/level was incorrect. We have revised the CHART OF LONGWOOD ON AND OFF CAMPUS PROPERTIES WITH GROSS SQUARE FOOTAGE AND FLOORING TYPES that was included as an ATTACHMENT in the RFP that reflects the correct cleanable square footage currently being serviced and will continue to be under the new contract. Please provide a FINANCIAL PROPOSAL based on the revised chart.
2. The following clarification of service at the Longwood House (President's home) shall be included in the contract:
 - No inside cleaning or outside patio or porch cleaning.
 - Gardener that works for Landscaping and Grounds – full time position.
 - Pest control – must be scheduled.
3. Are you able to afford any type of on demand event set up assistance for event table and chair deliveries? The University current has 275 event chairs, 50 event tables and (35) 40-gallon trash cans that occasionally need to be delivered to service special events in nontraditional spaces such as the library, atriums and occasionally outside. While it is rare that all would be out for one event, occasionally multiple events could happen in the same day. A scenario may be 50 chairs to the library and 4 tables and a trash can to an office. There are currently less than 100 of such events per year. For every set up there is also a takedown, so each item is touched twice. If you are unable to include such services directly, but able to sub-contract either the labor or the labor and equipment, the University would be open to discussing such solutions. Should you be able to accommodate this request, it must be performed by staff separate from the custodial staff. Additionally, while we do our best to have such deliveries a day before the event and taken down the day after, sometimes these need to be done in the late afternoon; is this doable?
4. Could you please clarify if we have a large event using 20 trash cans would you service them or is this an example of an 'on demand' add on service? Examples would be: Oktoberfest, Spring Weekend, Graduation and Alumni Weekend on Lankford Mall and Stubbs Lawn. There are less than 15 such events

per year (not including Athletic events). If on demand/add on service, the University would like to look at possibly including it in the basic contract services.

5. The snow removal equipment listed below is currently being used on the contract:

- Two (2) Toro Grandstand with a snow plower and a rotary broom.
- Snow shovels.
- Winter uniforms (proper clothing).
- Two (2) push spreaders for dropping ice melt.
- Longwood provides sprayers and a container to fit a utility vehicle. If they need to be replaced, the contractor must cover that. Longwood provides the liquid brine and will continue to do so.

What type of snow removal equipment are you going to use?

6. The RFP sections identified below are being modified as follows:

Section D.1. – Residential Facilities, Page 6

- Remove mopping floors behind the machines.
- Change “clean lint traps in the washers and dryers” to “clean lint traps on the dryers each morning”.
- Add: All Contractor employees will be considered “essential” and follow the same procedures as the University’s essential personnel during inclement weather. The Contractor shall provide snow/ice removal for all exterior areas (to include all areas within 10 feet of exterior doors, steps and ramps). The Contractor shall assist the Landscaping and Grounds staff with spreading salt and/or brine during inclement weather. Contractor employees shall be managed by the Director of Landscaping and Grounds during inclement weather events for snow/ice removal.

Section D.2. – Academic/Administrative Office Buildings, Page 7

- Add: All Contractor employees will be considered “essential” and follow the same procedures as the University’s essential personnel during inclement weather. The Contractor shall provide snow/ice removal for all exterior areas (to include all areas within 10 feet of exterior doors, steps and ramps). The Contractor shall assist the Landscaping and Grounds staff with spreading salt and/or brine during inclement weather. Contractor employees shall be managed by the Director of Landscaping and Grounds during inclement weather events for snow/ice removal.

Section D.3. – Athletic Facilities, Page 7

- Last paragraph is changed to read, “Athletic facilities will need custodial service when events are being held, including trash collection/clean up. Event schedules will be provided.

Section D.6. – LU REF Properties, Page 8

- The last sentence is changed to read, “spreading salt and/or brine”.
- Add to the end of paragraph: “Contractor employees shall be managed by the Director of Landscaping and Grounds during inclement weather events for snow/ice removal.

- Add: “All trash shall be pulled and removed from buildings and carried off campus to the compactor/open top container by the start of the business day (8:00 a.m.)”.

Negotiations began with introductions. A general discussion about the above points occurred. It was determined that additional information/clarification was needed before going further. Specifically, Budd asked if they could conduct a comprehensive campus tour to identify the exact cleanable square footage to be included in the contract. Longwood agreed to this and the tour was scheduled for Wednesday, November 7, 2018. Longwood and Budd agreed to a second meeting that was scheduled for November 15, 2018.

November 15, 2018

In the second meeting, Longwood and Budd agreed to an Initial Contract Period of one (1) year and nine (9) months instead of two (2) years, so that subsequent optional renewal periods would align with the calendar year. The Initial Contract Period is March 1, 2019 through December 31, 2020.

Budd asked if they could request an increase after one (1) year, based on the Consumer Price Index (CPI) for the county Longwood is located in (Prince Edward). Longwood agreed to this request.

Budd’s revised financial proposal presented at this meeting was \$1,962,600.00, which included three (3) Utility Technicians, one (1) Box Truck and \$35,000 in ACA costs. Longwood stated they needed to have an internal meeting to review the revised financial proposal and confer with University Events and Ceremonies, to ensure the proposed staffing level was adequate. This meeting was scheduled for November 26, 2018.

November 26, 2018

In the Longwood internal meeting, it was determined the University Events and Ceremonies staffing level was high and services could be managed with two (2) Utility Technicians instead of three (3). Budd was conferenced in to the meeting and asked to provide a financial proposal with two (2) Utility Technicians. The final financial proposal that Budd submitted was \$1,928,850. Longwood accepts Budd’s final financial proposal.

END OF ATTACHMENT 1



PROPOSAL

FOR CUSTODIAL SERVICES

Developed for:

LONGWOOD
UNIVERSITY



RFP #: LU214-18-012

Submittal Address:

Longwood University
201 High Street
Lancaster Hall. Room 207A
Farmville, Virginia 23909

Due Date:

July 19, 2018



July 19, 2018

To the Review Committee,

Thank you for your interest in The Budd Group and for inviting us to submit our Custodial Services Proposal for Longwood University. The Budd Group has enjoyed working with several independent schools throughout the southeast and we look forward to the prospect of working at your school.

We have based our proposal on our current experience in similar high education environments and our understanding of the labor market in Farmville, VA and the surrounding area. It is our desire to be a valued partner and to be good stewards of the environment and of your resources. We commit to providing customized solutions that are both economically and operationally feasible.

The Budd Group will provide the required custodial services as outlined in the scope of work. We have thoroughly reviewed and understand the work requirements and cleaning specifications. Our goal is to transition the program seamlessly and provide one point of contact for custodial services. We plan to generate efficiencies among the team, while maintaining quality, through management oversight, accountability, training and industry best practices. Thus, allowing you to focus on your core business- education.

We are confident in our unique ability to meet and exceed your expectations and we welcome the opportunity to review our overall program and discuss any adjustments that will benefit your school.

If you have any questions or need additional information, please feel free to contact me at (919) 630-3730.

Sincerely,



Katie McConnell
Business Development Manager
The Budd Group



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Section: Section Title:

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- 2 Offeror Data Sheet, included as ATTACHMENT C to the RFP
- 3 Responses to all requirements set forth in Section IV.
 - A STATEMENT OF NEEDS-Executive Summary
 - B A brief history of the company and their experience providing the goods/services described herein.
 - C Specific methodology, approach, and plans for providing the proposed goods/services describe herein- Operations Plan and Policies
 - D Names, qualifications and experience of personnel to be assigned to the contract-
 - E Resumes of key managers and supervisors, as well as the person at the corporate, who will be responsible for the overall contract, to be assigned to the contract.
- 4 Small Business-Subcontract Plan- Attachment B
- 5 Financial Proposal
- 6 APPENDIX
 - Sample Implementation Plan
 - Employee Recognition Program
 - Employee Care Fund
 - Sample Quarterly Business Review Agenda





Section 1

- ▶ COMPLETED RFP COVER SHEET AND ADDENDA
ACKNOWLEDGEMENTS



Issue Date: May 25, 2018 RFP#LU214-18-012
Title: Custodial Services Commodity Code: 91039

Issuing Agency: COMMONWEALTH OF VIRGINIA **OPTIONAL PRE-PROPOSAL CONFERENCE**

Longwood University Tuesday, June 12, 2018 at 11:00 a.m.
Materiel Management and Purchasing Lancaster Hall, Room 223
201 High Street, Lancaster Hall, Room 207A Longwood
University Farmville, Virginia 23909

Location Where Work Will Be Performed: Longwood University, Farmville,
Virginia 23909 Initial Period Of Contract: January 1, 2019 through December
31, 2020.

**Sealed Proposals Will Be Received Until: July 10, 2018 at 2:00 p.m. Local Time For
Furnishing The Goods/Services Described Herein. Proposals Shall Be Date/Time Stamped By
The University Upon Receipt.**

All Inquiries For Information Should Be Directed To: Cathryn B. Mobley, Associate Vice
President for Administration and Finance, using ATTACHMENT A – WRITTEN PRE-
PROPOSAL QUESTION FORM emailed to materielmanagement@longwood.edu or faxed to
(434) 395-2246. **Deadline for submitting questions is 12:00 noon on June 19, 2018. The
University will not accept any questions after this deadline.**

**PROPOSALS MUST BE MAILED OR HAND DELIVERED DIRECTLY TO ISSUING AGENCY
SHOWN ABOVE. Note: If you**

**use an express delivery service, you may be told Farmville, VA/Longwood University is a
next day delivery location from your location, but make sure the carrier guarantees
delivery by 2:00 p.m.**

In Compliance With This Request For Proposals And To All The Conditions Imposed
Therein And Hereby Incorporated By Reference, The Undersigned Offers And Agrees To
Furnish The Services In Accordance With The Attached Signed Proposal Or As Mutually
Agreed Upon By Subsequent Negotiation.



State Corporation Commission (SCC) ID#: _____ or statement describing why offeror is not required to have a SCC ID# must be furnished with your proposal.

eVA Member: ☒ Yes ☐ No

Check all that apply: Small Business ☐
Woman-Owned ☐ Minority-Owned ☐

eVA Vendor ID#: VS0000059894

DSBSD Certificate Number _____ Expiration Date ____/____/____

Note: Offeror shall be a registered eVA vendor on the date and time designated for receipt of proposals to receive an award on this contract. See paragraph X on page 6 of the General Terms and Conditions for eVA registration information.

Name And Address Of Firm:

The Budd Group
1101 Aviation Parkway, Suite A
Morrisville, NC 27560

Date: July 16, 2018

By: *Katie McConnell*

Signature in Ink

Name: Katie McConnell

E-mail: kmccconnell@buddgroup.com

Title: Business Development Manager

Phone: (919) 630-3730
(Toll Free, if available)

Fax: (919) 544-1212
(Toll Free, if available)



ATTACHMENT A – WRITTEN PRE-PROPOSAL QUESTION FORM

Project: Custodial Services
Longwood University
Farmville, Virginia 23909

Attention: Cathryn B. Mobley, CPA, CUPO, VCCO, VCO
Associate Vice President for Administration and Finance
Lancaster Hall, Room 217C
Longwood University
Farmville, Virginia 23909
Fax: 434-395-2246 | Email: materielmanagement@longwood.edu

The following questions are against RFP# LU214-18-012

<u>Section, Page, Paragraph, Line(s)</u>	<u>Question</u>

The deadline for submitting questions is **12:00 Noon, June 19, 2018**. All responses to questions will be made by addendum. **The University will not accept any questions after this deadline.**

Question(s) submitted by:

<p><i>Katie McConnell</i></p> <p>_____ Name</p>	<p>The Budd Group</p> <p>_____ Company</p>
<p>Email Address: <u>kmccconnell@buddgroup.com</u></p>	
<p>Phone # <u>(919) 630-3730</u></p>	<p>Fax # <u>(919) 544-1212</u></p>



LONGWOOD UNIVERSITY

201 High Street
Farmville, Virginia 23909
tel: 434.395.2093
fax: 434.395.2246
trs: 711

June 7, 2018

ADDENDUM 1 TO ALL OFFERORS:

Reference Request for Proposals (RFP): LU214-18-012
Commodity: Custodial Services
Dated: May 25, 2018
For Delivery To: Longwood University
Materiel Management & Purchasing
Farmville, Virginia 23909
Optional Pre-Proposal Conference (OPPC): June 12, 2018 at 11:00 a.m. Local Time
Written Pre-Proposal Questions Due: June 19, 2018 at 12:00 Noon Local Time
Proposal Due Date: **July 10, 2018 at 2:00 p.m. Local Time**

This Addendum 1 to the RFP is being issued to clarify the date of the Optional Pre-Proposal Conference.

1. Reference Section IX. SPECIAL TERMS AND CONDITIONS, Page 28, Paragraph 13. OPTIONAL PRE-PROPOSAL CONFERENCE: The first sentence is changed to read: An optional pre-proposal conference will be held at 11:00 a.m. on June 12, 2018 in Lancaster Hall, Room 223.

All other general terms, conditions, and specifications shall remain the same.

Note: A signed acknowledgment of this addendum must be submitted with your proposal. Signature on this addendum does not substitute for your signature on the original proposal document. The original proposal document must be signed.

Very truly yours,



Cathryn B. Mobley, CPA, CUPO, VCCO, VCO
Associate Vice President for Administration and Finance

The Budd Group

Name of Firm



Business Development Manager

Signature/Title

07/17/2018

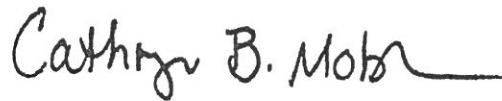
Date

Office of the Director of Materiel Management,
Central Stores, and Property Control



Note: A signed acknowledgement of this addendum must be submitted with your bid. Signature on this addendum does not substitute for your signature on the original bid document. The original bid document must be signed.


Very truly yours,



Cathryn B. Mobley, CPA, CUPO, VCCO, VCO
Associate Vice President for Administration and Finance

The Budd Group

Name of Firm

 Business Development Manager

Signature/Title

07/17/2018

Date

54. Reference Section IV, Pages 6-7, Paragraph D, Line 3: Will the tarping of the floor in Willett require a fork lift driver?

RESPONSE: No.

55. Reference Section IV, Page 9, Paragraph F: Is there record of frequency of mishap cleanings?

RESPONSE: No.

56. Reference Section IV, Page 10, Paragraph L: Is there record of frequency of filter changes?

RESPONSE: See response to question 45 above.

57. Reference Section IV, Pages 10-11, Paragraph M: Are you all satisfied with your present exterminator?

RESPONSE: The present exterminator is contracted by the current contractor. They have been very responsive.

58. Reference Section IV, Page 11, Paragraph N: To be clear as it is stated 2 ways in the RFP, both interior and exterior are to be cleaned by the contractor?

RESPONSE: Yes.

59. Reference Section IV, Page 12, Paragraph O, Line 5: What is the preferred toiletry package (i.e., what is in it) and do the beds need to be dressed with linens?

RESPONSE: Toiletry package should, at a minimum, include soap, garbage bag, shampoo, and a wash cloth). Yes for special events; otherwise, a linen pack is provided and the guest makes their own bed.

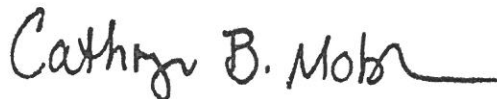
60. Reference Section IV, Page 10, Paragraph K: Is there a record of the frequency on relamping?

RESPONSE: No; the frequency is based on when bulbs burn out.

All other general terms, conditions, and specifications shall remain the same.

Note: A signed acknowledgement of this addendum **must** be submitted with your bid. Signature on this addendum does not substitute for your signature on the original bid document. The original bid document must be signed.

Very truly yours,



Cathryn B. Mobley, CPA, CUPO, VCCO, VCO
Associate Vice President for Administration and Finance

The Budd Group

Name of Firm



Business Development Manager

Signature/Title

07/17/2018

Date

21. When will bids be opened and will they be opened publicly? If not, how will they be opened?

RESPONSE: The procurement method for this contract is Competitive Negotiation by the issuing of a Request for Proposals (RFP). Public opening of proposals submitted under competitive negotiation is not required by law. Proposals received will be opened and reviewed for completeness before distributing to an evaluation committee for their review and scoring.

All other general terms, conditions, and specifications shall remain the same.

Note: A signed acknowledgement of this addendum **must** be submitted with your bid. Signature on this addendum does not substitute for your signature on the original bid document. The original bid document must be signed.

Very truly yours,



Cathryn B. Mobley, CPA, CUPO, VCCO, VCO
Associate Vice President for Administration and Finance

The Budd Group

Name of Firm

 Business Development Manager

Signature/Title

07/17/2018

Date



Section 2

▶ OFFEROR DATA SHEET- ATTACHMENT C



ATTACHMENT C – OFFEROR DATA SHEET (TO BE COMPLETED BY OFFEROR AND RETURNED WITH PROPOSAL)

- A. **Qualification of Offeror:** The Offeror must have the capability and capacity in all respects to fully satisfy all of the contractual requirements. Indicate below the length of time you have been in business providing the goods/services required herein.

55 Year(s) Month(s)

- B. **References:** List three (3) contacts (preferably a college or university, if available) for whom you have provided this type of goods/services that the University has your permission to contact.

1. Company/Name of Contact Person: Virginia Tech/Greg Canady
Address: 270 Southgate Center, Blacksburg, VA 24061
Phone Number: 540-231-9614
Dates of Service: 2011- Present
Email Address: gregmc1@vt.edu

2. Company/Name of Contact Person: High Point University/Steve Potter
Address: 833 Montlieu Avenue, High Point, NC 27262-3598
Phone Number: 336-841-9125
Dates of Service: 2011- Present
Email Address: spotter@highpoint.edu

3. Company/Name of Contact Person: Anderson University/Charles Dickerson
Address: 316 Boulevard, Anderson, SC 29621
Phone Number: 864-231-2000
Dates of Service: 2006-Present
Email Address: cdickerson@andersonuniversity.edu





Section 3

▶ RESPONSES TO ALL REQUIREMENTS SET FORTH IN SECTION IV





Section A

▶ STATEMENT OF NEEDS



Why Choose The Budd Group?

Great People. Smart Service. Your Success

- ▶ Successfully managing over 75,000 million square feet of cleanable space throughout the southeast = a dense presence in the education market and a strong labor base for recruitment
- ▶ Operations Support and Implementation/Transition Team - 4 Operations Managers, Field Service Coordinator, Regional Operations Manager, Business Analyst = additional support for the on-site team for the transition and throughout the life of the contract.
- ▶ 90% client retention rate = long term partnerships spanning 55 years
- ▶ Local, long term industry partnerships with our Sealed Air, Diversey, Karcher, Tennant and Windsor suppliers = same day delivery, vendor training and preventative maintenance programs
- ▶ Lowest employee turnover rates industry wide = competitive pay rates and benefits to attract qualified, long-term associates that can generate efficiencies and reduce customer costs
- ▶ Customized program built around individual site needs = currently providing a variety of services to our clients that includes custodial, maintenance, staffing support, utility and grounds-keeping services
- ▶ The financial resources and capability to be flexible with client's growth and changing environments (The Budd Group is debt free)= we currently have additional staffing support available for special projects and the ability to manage any changes within client's scope of work
- ▶ Cost Control Measures, Key Performance Indicators: The Budd Group strives to be good stewards of your money = transparency
- ▶ CIMS (Cleaning Industry Management Standards) Certified with Honors for Green Buildings = Sustainability



Executive Summary

The Budd Group Partnership Program designed exclusively for Longwood University will incorporate over 55 years of experience in providing your team with excellent service more cost effectively. It is our desire to be a true partner and a seamless extension of your staff.

The Budd Group's program will provide financial savings while improving the service, allowing you to create the best possible environment for your students, staff and visitors.

Our Services Begin with Great People

Experienced and dedicated on-site management is the key to success for all of our facility programs. Your program includes a staffing plan which assigns highly trained experts to your facilities. We will self-perform all services as outlined in the scope of work requirements and will not subcontract.

The Budd Group also provides management support for your account on a local, regional and corporate level. Our goal is to provide redundancy of oversight and a highly reliable service program. In addition to our on-site janitorial team, you will receive extensive support and customer service from the following local management team members.

The following local managers will support your facilities on a weekly and monthly basis:

Damon Scott	Implementation/Education Specialist
Sam Ross	Area Operations Manager
Greg Stump	Regional Director of Janitorial Operations
Donna Odom	Field Services Coordinator
Vanita Davis	Business Analyst
Katie McConnell	Customer Service Manager
Jon Larsen	COO and Executive Sponsor



Executive Summary

Operating Highlights of Our Smart Service Program

Transition and Start Up

A comprehensive transition and start up plan will begin at a minimum of 30 days before the established start date to ensure a smooth transition. A dedicated transition team will be assigned for the first 30 days of the implementation. Our transition and education manager experts, Sam Ross and Damon Scott, will be dedicated to the facility during the transition and will lead the team to ensure there are no interruptions. Our transition program includes a solid communication plan that helps transitioning employees and your key staff members have a clear understanding of the transition every step of the way.

Training and Development

The Budd Group has developed a specific facilities training program for higher education. The foundation of our training program was built upon **best practices** from our operating groups and from our suppliers such as Sealed Air. Sealed Air is a national leader for the production of Green Sealed cleaning chemicals that are implemented into our *Healthy High Performance Cleaning* program. Our supplier partnerships allow us the opportunity to develop our staff which gives our customers and you the assurance of qualified technicians and associates taking great care of your facilities.

Quality Assurance Program

The Budd Group follows a comprehensive quality assurance program to ensure desired levels of service are kept consistently. Our program focuses on daily inspections, daily checklists, reinforcement training, customer surveys, and robust reporting systems. The reporting system will focus on a number of key performance indicators (KPIs) that will be set and agreed upon by both Longwood University-Belfield School and The Budd Group.

The KPIs may include:

- Work orders written by area
- Work orders closure rate by areas
- Cost reductions
- Staffing levels
- Facility inspection scores
- Survey scores
- Safety practices
- Sustainability practices
- Customer satisfaction



Executive Summary

Sustainability Program

The Budd Group will provide a comprehensive sustainability program that focuses on best green practices for janitorial services. Our program will take proven best-in-class practices and customize it around the goals and unique requirements of your current sustainability program. Our sustainable practices will focus on training, reporting (LEED), cleaning chemicals and equipment.

In an effort to display our commitment to sustainability, The Budd Group has obtained the Cleaning Industry Management Standard Certification for Green Buildings (CIMS-GB) with Honors. CIMS-GB is a nationally recognized certification program that provides third-party verification for cleaning operations that seek to develop a comprehensive green cleaning program and offer sustainable cleaning services. The CIMS-GB framework is designed to improve performance in the areas of sustainable product usage, improved occupant wellness, asset preservation, and waste diversion.

Systems and Reporting Program

Technology and automation will be a key component of the program. Integrating our cloud-based systems allows us to obtain and analyze data, real time, and make proactive service adjustments without any disruption of service. The Budd Group has invested in the following software systems:

- ▶ **Cloud-based Inspection Software** will be utilized to facilitate inspections. This system allows access to inspection forms from any smart device and provides very comprehensive trend reports that allow our on-site team to quickly adjust our program to increase quality.
- ▶ **Avionte** will be utilized to recruit and on board new employees fast and effectively. Some of the key feature of this cloud-based staffing and recruiting management software include: applicant tracking, order processing, contact management, resume parsing, document management, mobile searching, and background check tracking.
- ▶ **Budd University** will be utilized to facilitate and track all management training. This cloud-based system will provide initial and on-going training for all managers. Training topics include (but not limited too): safety, equipment, chemicals, and customer service and company policies.





Section B

- ▶ A BRIEF HISTORY OF THE COMPANY AND EXPERIENCE PROVIDING GOODS/SERVICES



Company Overview

The Budd Group is a private, family-owned and operated corporation with a long-standing tradition of hard work, integrity, and excellent customer service. The Budd Group was founded in 1963 and employs more than 4,500 associates throughout the Southeast. Facilities serviced include Class A Environments, Colleges and Universities, Private Schools, Manufacturing Sites, Industrial and Production facilities, Healthcare and Clean Room Environments, Retail, Churches and Recreational facilities. The company's annual revenue is \$140,000 million.

The Budd Group's core values are best exemplified by its founder and chairman, Richard Budd, whose motto has always been **"Do what you say you're going to do."** These simple, yet key, words are the driving force that has propelled the family-owned company from a modest janitorial supply company to a highly successful conglomeration of businesses with primary focus on janitorial, grounds and maintenance services.

Our company has enhanced the beauty, performance, and cleanliness of facilities and institutions for over 55 years. Through our in-house resources and preferred vendor resources, The Budd Group provides our customers with a comprehensive menu of facility services that results in exceptionally valuable partnerships. These services include a diverse range of Custodial-janitorial, grounds and maintenance services.

**"Do what you say you're
going to do."**



Richard Budd



Company Overview

The Budd Group delivers janitorial services to millions of square feet of space throughout the Southeast. By enhancing the cleanliness of our customer's facilities, The Budd Group helps our clients not only enhance their brands and preserve their assets but also improve employee satisfaction and retention by creating healthier, more environmentally-responsible facilities.

The Budd Group offers a diverse range of janitorial services, which include, but are not limited to:

- ▶ Full Service Cleaning Programs
- ▶ Day and Weekend Porter Services
- ▶ Floor Care Programs
- ▶ Specialty Cleaning Services
- ▶ Maintenance Services
- ▶ Emergency Environmental Services
- ▶ Window Cleaning Services
- ▶ Waste Removal
- ▶ Recycling
- ▶ Event Cleaning Services
- ▶ Parking Deck Cleaning



At The Budd Group, we are committed to providing the best service possible to our customers. We know that consistency and excellence are essential and that your janitorial services hinge on hiring the right people. We operate under the principles of ISSA Cleaning Industry Management Standard (CIMS) to deliver a more purposeful, customer-focused execution of our cleaning services. We also offer comprehensive green cleaning solutions under the guidelines of the United States Green Building Council (USGBC).

In addition, we embrace and seek out state-of-the-art technology to promote efficient work processes, information flow, communication, and quality control. We have teamed with Diversey and their "Responsible Solutions" program to develop a comprehensive green cleaning solution for our entire customer base. Through the utilization of technology and by optimizing business processes, we are able to offer our customers real value and a competitive edge.



Experience and References

The Budd Group has the people, service, technology, processes and experience to deliver **reliable**, **dependable** and **efficient** Custodial-janitorial services. We will provide high-quality and timely janitorial services by completing the scope of services, accomplishing the required objectives and meeting the project deadlines outlined in this RFP.

The Budd Group specializes in cleaning professional environments, and we have a rich history of providing custodial services to many companies across the Southeast. With over 55 years of experience delivering top-notch facility services, The Budd Group is uniquely qualified to provide you with an exceptional janitorial program.

The Budd Group services 10,000 – 2,000,000+ square feet in a single location and we provide janitorial services to more than 75 million square feet at facilities throughout the Southeast.

We currently service over 625 custodial contracts throughout our client footprint, and the references provided on the following page demonstrate our ability to manage accounts like yours and provide you with exceptional janitorial services.



Colleges and Universities

Wake Forest University - (Winston-Salem, NC)

John Shennette

(336) 758-4623

shenetjj@wfu.edu

Piedmont Technical College (Greenwood, SC)

Brenda Holland

(864) 941-8332

Holland.B@ptc.edu

Seminole State College of Florida (Sanford, FL)

Gary Snyder

(407) 708-2366

snyderg@seminolestate.edu

Presbyterian College (Clinton, SC)

Susan Maddux

(864) 833-8205

smaddux@presby.edu

Tri-County Technical College (Pendleton, SC)

Ken Kopera

(864) 313-7668

KKopera@tctc.edu



Colleges and Universities

Guilford Tech Community College (Jamestown, NC)

Lenore Coleman
(336) 334-4822, Ext. 55014
lwclem@gtcc.edu

Danville Community College (Danville, VA)

Ruth Whitt
(434) 797-8450
rwhitt@dcc.vccs.edu

William Peace University (Raleigh, NC)

John Cranham
(919) 508-2336
jcranham@peace.edu

Converse College (Spartanburg, SC)

Rick Jolley
(864) 596-9041
rick.jolley@converse.edu

North Greenville University (Tigerville, SC)

Mick Daniel
(864) 977-7018
mick.daniel@ngu.edu



School Systems

Rock Hill School District #3 (Rock Hill, SC)

Michael Cox
(803) 242-6449
mcox@rock-hill.k12.sc.us

Chester County School District (Chester, SC)

Bobby Roddey
(803) 581-9309
broddey@chester.k12.sc.us

Charleston County School District (Charleston, SC)

Dennis Burgess
(843) 746-1314
dennis_burgess@charleston.k12.sc.us

Winston-Salem/Forsyth County School District (Winston-Salem, NC)

Darrell Walker
(336) 727-2095
dwwalker@wsfcs.k12.nc.us

Hall County School District (Gainesville, GA)

Joe Cravero
(770) 534-1080
joe.cravero@hallco.org





Section C

▶ SPECIFIC METHODOLOGY, APPROACH, AND PLANS FOR PROVIDING GOOS/SERVICES



Staffing Plan

The Budd Group's Staffing Model including full and part-time labor for 59 associates and will per the RFP retain all eligible incumbent team members for 90 days:

1 Dedicated Account Manager- One Point of Contact

The Budd Group will utilize a highly qualified, dedicated Account Manager to oversee and develop the entire staff. The Account Manager will also be the main communication liaison between The Budd Group and Longwood University. The work schedule of the Account Manager will vary but will typically work during the first shift but will also oversee some of the night time project work.

A Site-Based Operations Manager will assist the Account Manager with the daily operations of the custodial department and will act as an additional point of contact for the Longwood Facility Management Team.

A Site Based Administrative Assistant will manage the work order systems and assist with inventory management duties.

Donna Odom, the dedicated Regional Field Services Coordinator will assist the account manager with hiring, recruiting and retention efforts.

Shift Supervisors and Team Leaders will be in place as well in order to monitor employee performance and coordinate on-the-job training. Other highlights of our staffing plan include the following:

Day Shift

The first shift will be staffed with a Day Shift Team Leaders and Day Cleaners from 5:00 AM to 1:00 PM. These team of people will be responsible for the daily cleaning of the facilities so that APPA Level 2 standards are kept. This team will also be responsible for all the recycling.

Evening Shift

All project floor work will generally take place during third shift. Start times will vary from 8:00 PM to 10:00 PM depending on the size of the project and the availability of the building. This shift will consist of a Shift Supervisor, Team Leaders and Floor Technicians.

Additional Monthly Support

Virginia Tech-Mentor

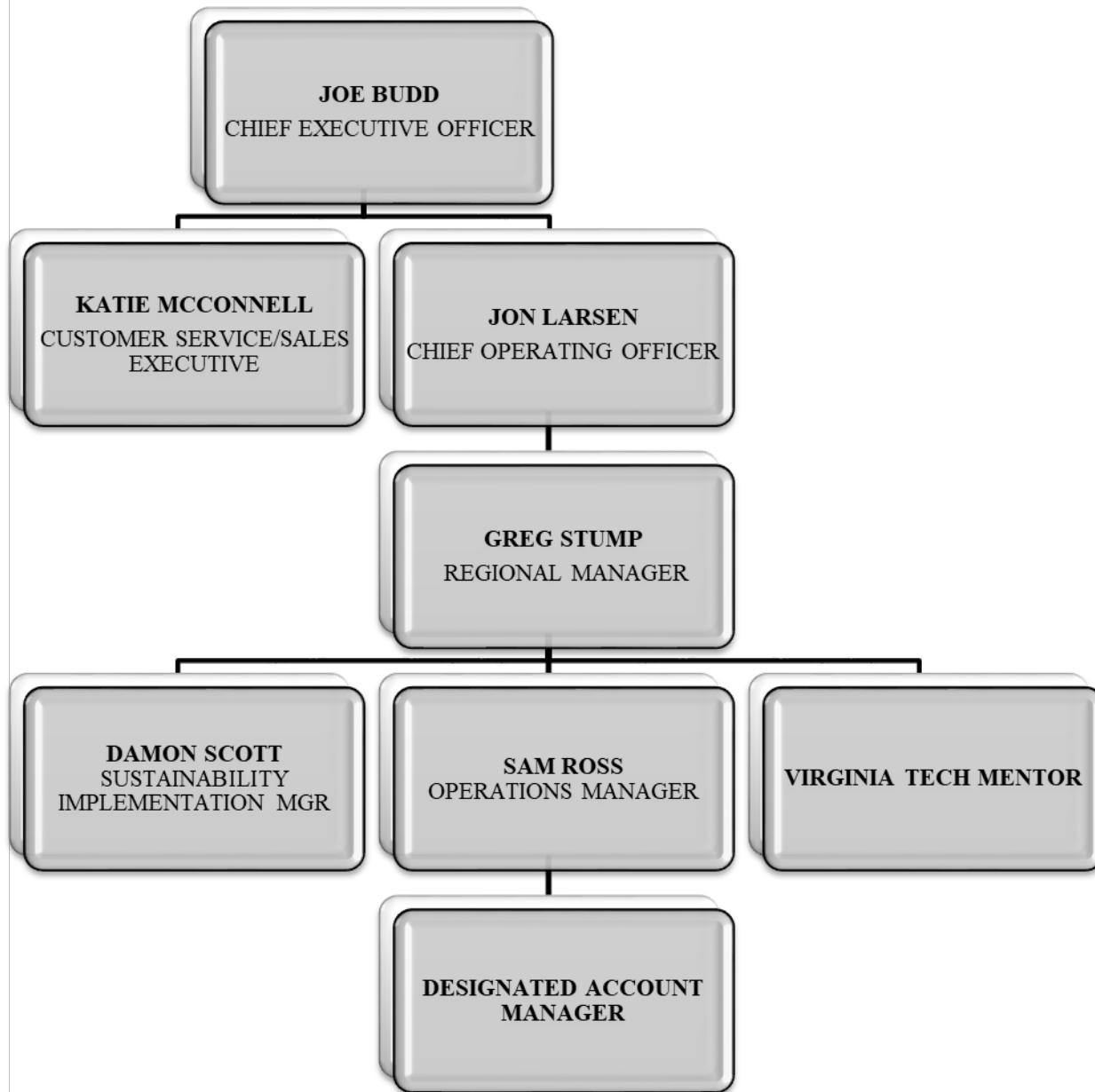
Damon Scott-Education Specialist

Sam Ross- Operations Manager

Greg Stump-Regional Manager

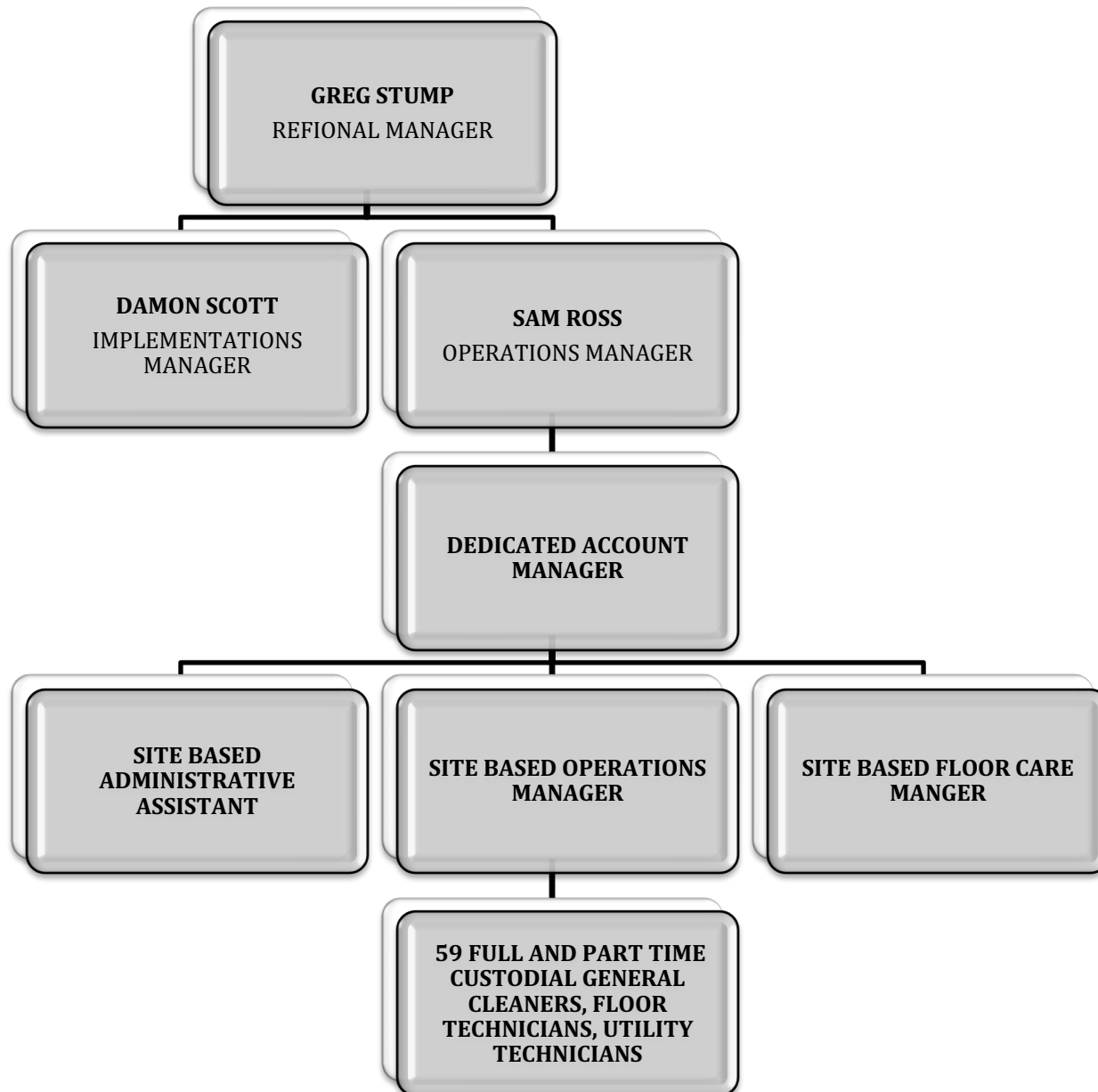
Jon Larsen- COO and Executive Sponsor (Quarterly Support for Business Review Meetings)





Site Based Reporting Structure

Annual Cleaner Hours: 56,043- Annual Management Hours: 5740- Annual Hours: 61,783- Productivity Rate per General Cleaner: 3831 per hour



Team Cleaning and Zone Cleaning

The Budd Group plans to implement the team cleaning method primarily in the residence halls, administration and academic areas and the zone cleaning model for high profile areas, such as the student center, etc. This hybrid model will enable us to deliver quality service more efficiently while meeting the APPA level goals per the RFP.

Benefits of the Hybrid Model

- ▶ Higher quality of cleaning performed in less time
- ▶ Specialized job training
- ▶ Supervision on each team
- ▶ Accountability among the team
- ▶ Accountability among the team
- ▶ Lower equipment cost is needed
- ▶ Team work concept
- ▶ Safer way to work



Longwood Quality Assurance and Communication Plan

Strategy:

Establish, communicate and document a multi-level quality assurance program to ensure customer satisfaction. Inspections conducted at site and branch level to ensure quality. Information communicated with client formally monthly and quarterly. Established relationship managers, Greg Stump, Katie McConnell and Sam Ross to hold entire team accountable. Provide executive level commitment to support the team and plan through the quarterly review program.

Key Players:

Greg Stump, Regional Mgr.
Sam Ross, Operations Mgr.
Katie McConnell, Relationship Mgr.
Jon Larsen, COO and Executive Sponsor

Janitorial

Type	Responsible	Frequency	Notes
Daily Site Inspection	Site Manager	Daily	Site manager normal daily review
Branch Inspection	Janitorial Operations	Weekly	Inspection done by branch staff to validate work done by on site team
Client Meeting	Janitorial Branch Manager	Monthly	Formal monthly meeting between branch management and Longwood staff
Client KPI Review Meeting	Branch and Executive Team	Quarterly	Formal review with executive level attendance. KPI Review



Operations Plan and Policies

The Budd Group will provide the required janitorial services as outlined by your company. We have thoroughly reviewed and understand the specific scope of work requirements and cleaning specifications. We will proudly self-perform all services and will not subcontract janitorial services for your facilities.

Our experience allows us to maximize our management resource in relation to expanding our scope and enhancing customer service and a proactive approach to address your service needs.

The Budd Group has designed a comprehensive plan of operation. We have established the program according to the nature of services expected, the scope of work requirements, and the amount of labor required to consistently and professionally maintain your facilities.

The Budd Group will utilize an Onsite, Dedicated Manager to oversee and direct the staff. This manager will communicate with you and your designated liaisons on a daily basis. Additionally, they will monitor employee performance and coordinate on-the-job training and execute daily, weekly and monthly inspections. Our Operations Managers will supervisor and perform monthly inspections.



Management Support

The Budd Group feels that the key to a smooth running operation is the management support, on-site supervision, and a strong line of communication between Longwood University and The Budd Group.

The Budd Group will have management support personnel available 24 hours a day to support our operations at your campus.

Management Reports

The Budd Group utilizes a variety of reports to measure and outline our progress and success. We will work with you to review current software and reporting systems and, if necessary, incorporate Budd Group systems to ensure we are capturing the pertinent data. Reports focus on the following areas: Time and Attendance, Labor Distribution, Accounts Payable Distribution and Vendor Profile, Job Cost Report, Inspection Reports and Work Request Reports.



Operations Plan and Policies

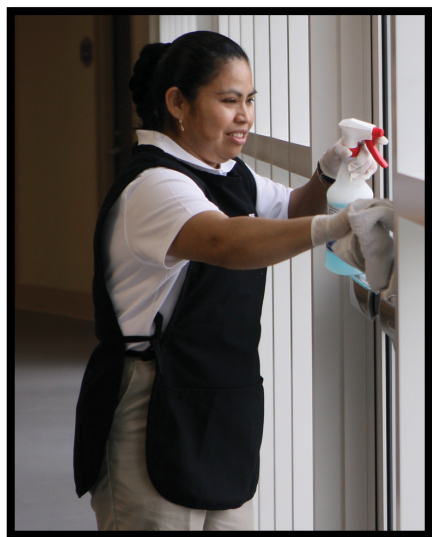
Covering Absenteeism

The Budd Group realizes the need to minimize employee absenteeism. However, with the economic factors facing us today, absenteeism will never be completely eliminated. Therefore, providing appropriate training and cross-training of employees is critical in today's marketplace. The Budd Group cross-trains on-site employees so they can fill in should an employee be absent. Additionally, The Budd Group recruits part-time employees that will be available on short notice to cover employee outages. These employees will not be charged back to the client, but will be compensated from the dollars generated through employee absenteeism.

Uniform Policy

The Budd Group recognizes that the appearance of our employees reflects on both our customer and The Budd Group. We also realize the importance of the safety of our employees at each facility. The Budd Group will see that each employee is provided with the necessary uniform and any personal protective equipment required to perform his/her job. These uniforms are provided at no cost to the employee. The laundering and upkeep of the uniforms is the responsibility of the employee unless otherwise noted. **Each employee is expected to be in uniform at all times while on-the-job and portray a neat and professional appearance.**

The Budd Group has a number of uniform options. The pictures below display the various uniforms that are typically utilized for employees. A uniform consists of a collared shirt with neutral colored pants. A typical uniform for a general cleaner working 2nd or 3rd shift consists of a Budd Group logo smock or apron, or a collared shirt or t-shirt, neutral colored pants and non-slip shoe covers.



Operations Plan and Policies

Corrective Action Plan

The Budd Group has a general process outline for handling customer complaints and corrective action plans, but the final process outline is typically customized to meet the particular needs of each facility once the contract has started. During the implementation phase of our program, the general process will be discussed with Longwood University and a more defined process will be agreed upon and implemented.

The following outlines the general process that will be used as a starting point:

- ▶ Longwood University will have the option for issuing a work order by three methods: phone, email or web portal. A work order can either be a complaint about services or a special request. The client may choose just one option or all three for the normal protocol of submitting a work order. This will be established in the implementation phase.
- ▶ The work order will be logged into our quality/inspection system by our staff so that it can be tracked by the Area Manager and additional management staff.
- ▶ The work order will be assigned to the appropriate Budd Group employee and an automatic email notification will be sent out to the employee.
- ▶ The employee will address the work order with your site contact.
- ▶ Once the work order has been addressed, the employee will then close out the work order on the quality/inspection system. This informs all managers that the issue has been resolved.
- ▶ A follow up visit or phone call to the customer will then be facilitated by the Area Manager to ensure everything was taken care of.
- ▶ The Area Manager evaluates all work orders on a daily and weekly basis to see if additional training is necessary in order to correct the issue.
- ▶ If training is necessary, then a formal training session is provided by the Area Manager to the particular employee (or group of employees).

We also offer incentives such as gift cards, catered lunches, etc. for employee teams that meet Key Performance Indicators.

A summary of work orders and corrective action plans are prepared on a quarterly basis and presented to your team in the Quarterly Review Meetings.



Operations Plan and Policies

Continuous Improvement Plan

The Budd Group's quality program offers a customized set of processes that are implemented and measured at your facilities. To ensure a purposeful, customer-focused execution of services, we are committed to operating under the principles of CIMS, and our focus on quality and accountability allows us to meet your needs and expectations in a more efficient, cost-effective manner.

Our basic operating principle is based on the words of our founder, Richard Budd, who said, "Do what you say you are going to do." To meet this promise, The Budd Group janitorial division utilizes a quality assurance program based on seven fundamental tools:

- ✓ Proactive communications
- ✓ Key performance indicators
- ✓ Work order reports
- ✓ Inspections
- ✓ Team meetings
- ✓ Customer surveys
- ✓ Program review meetings

In addition, our multi-level management team performs regular quality audits and customer visits to ensure the highest level of cleaning service is being performed at your facilities.



Training and Development

The Budd Group believes in offering all employees the opportunity for development. We know that by investing in the training and development of our employees, we will improve their performance, job satisfaction, and ultimately their retention. We identify employees who consistently perform and form best practices in their daily tasks. These employees are utilized as mentors or trainers for new employees.

Our experience has shown that this investment has a direct effect on their performance, and ultimately, on customer satisfaction. In this effort, we have partnered with local technical schools, churches, and universities to offer programs and courses to enhance our employees' knowledge and improve their skill set.

Quality starts with Training

Safety Training

The Budd Group desires all our employees to be healthy, productive, and safe from harm. Our employees receive several hours of general safety training, which covers job safety, lifting, falls, and chemicals. Topics covered in our training program include:

- ▶ Emergency evacuation (site specific)
- ▶ Safety in the workplace
- ▶ Hazardous materials
- ▶ Chemical labels and MSDS (Materials Safety Data Sheets)
- ▶ Slips, trips and falls
- ▶ First Aid
- ▶ Back Safety
- ▶ Blood borne pathogens
- ▶ Wet floor procedures
- ▶ Personal Protective Equipment
- ▶ Equipment Safety
- ▶ Lockout / Tagout (where applicable)



Training and Development

Standard Orientation

The Budd Group's standard orientation begins with a presentation on The Budd Group's standards of performance. The orientation covers basic on-the-job safety, how to clock in and out (WinTeam timekeeping), what to do when arriving at the client site, and how to handle emergencies, etc. An evaluation is given to determine how much information the employee has retained. Any areas needing further clarification are reviewed during a one-on-one discussion and highlighted in the orientation handbook.

Customized Orientation – Handbook

The customized orientation will include:

- Introduction
- Sign-In Procedures
- Dress and Demeanor
- Position Policies and Procedures
- Code of Conduct
- Attendance and Punctuality Policy
- Performance Standards for the Position
- Specific Policies for client's site
- Job and Role Description
- Job Related Specifications
- Energy Conservation
- Handling, Storage and Disposal of Hazardous and Toxic Chemicals and Materials
- Security Procedures
- Recycling
- Sexual Harassment Training
- Diversity Training

Our training program consists of the following major components:

- **Safety and Job skill training** – via video and on-site training
- **Observation, demonstration and verification of proficiency** – our site management team and local and regional management resources provide hands-on instruction and verification of proficiency
- **Mentoring** – each new hire is assigned a seasoned employee who is given a curriculum to share with their understudy
- **On the job coaching** – from their supervisor
- **Monthly training** – each project supervisor conducts monthly training on one facilities topic and one safety topic each month
- **Continuing education** – top performers are given an opportunity to get additional training and certifications through our vendors, trade organizations, and local schools



Employee Recruitment and Selection Process

We truly believe that our most valuable asset is our “Great People” and we treat them with the utmost respect. We are a family-run business and that family atmosphere filters down to our workforce. We offer competitive pay rates and benefits for our industry to all eligible employees. The Budd Group understands the unique needs of various environments and we are committed to providing professional, consistent, high quality services for facilities of distinction. Your employees and visitors are our customers. They rely on us to provide a safe, clean and pleasant environment that helps increase performance and extends the life of the buildings while reducing and managing overall costs. To be truly successful, we have a carefully planned and executed process for finding, selecting and training the “right” person for each job.

Below is an overview of The Budd Group’s employee recruitment and selection process, should there be a need to hire additional team members.

It is a common practice within The Budd Group to evaluate all employees working at the current sites for possible employment. All current employees will be invited to interview with The Budd Group. Once the interview process is complete, The Budd Group will request feedback on each employee we are proposing to hire with our organization. If the feedback is positive and the employee passes all background checks, drug testing and E-Verify – then an offer of employment will be extended to the individual.



Employee Recruitment and Selection Process

Selection Process

Potential candidates are reviewed and selected based upon qualifications and experience as they relate to specific position requirements. All applicants are required to file a recent (within 30 days) Criminal Record Report with their application. ***The application will meet all the required information from Regent University including a complete background check.*** Every employee will also meet all federal requirements for employment.

The Budd Group is registered and participates in the federal work authorization program to verify information of all new employees.

After all paperwork is successfully completed and an acceptable background report is complete, the applicant is personally interviewed by our local Field Service Coordinator. The best candidates are then set up for a second interview with our Project Manager and/or operations manager. Candidates chosen for employment are then required to pass a drug test administered by a local medical testing facility.

Additionally, **The Budd Group has elected to use E-Verify. This tool confirms the identity and eligibility of individuals to work in the United States.** The Budd Group voluntarily elected to utilize this system to ensure our customers and stake holders that our employees have the proper documentation to work within our organization. No potential employee will be allowed to work at any of your facilities without having passed all background procedures as required by you and The Budd Group.



When an agreement for employment has been made, the employee receives instruction on employee orientation, work safety and training procedures. Upon passing the drug test, employee begins The Budd Group orientation and training process. After training is complete, the employee is assigned to a specific site.

100% Background Checks
100% Drug Testing
100% eVerify



Employee Recruitment and Selection Process

Drug-free Workplace Policy

In addition to criminal background investigations, review of education, employment and personal references, and a motor vehicle record investigation, The Budd Group administers drug testing to all employees (100%).

The Budd Group understands that all forms of tobacco products (chewing tobacco, dip, snuff, cigarettes, cigars, etc.), alcohol, and drugs are prohibited on your property. We are committed to the health of your employees and visitors. Our services program provides a safe and healthy environment in which to work, and we certify that our employees will not smoke while on your properties.

Drug and alcohol tests will be administered under the following conditions:

Testing of Applicants

- **Pre-Employment Testing.** After a conditional offer of employment is made, all applicants are required to undergo a test for the presence of illegal drugs as a part of the pre-placement procedure. Any applicant who fails or refuses to submit to, tampers with, or fails to pass the pre-employment drug screen shall have his or her conditional offer of employment withdrawn. If test results are positive, the offer of employment will be withdrawn.
- **Random Testing.** All employees may be required to submit to drug testing on a random basis. Selection of employees for random testing shall be conducted through the use of a random number generator or other neutral selection process. Additionally, The Budd Group will participate in random drug tests performed at our customer's work sites as required by our customers. A waiver will be signed regarding random tests at time of placement at that work site. If the employee's results come back positive, he or she will be subject to immediate dismissal.
- **Post-Accident Testing** - Employees shall be tested for the presence of drugs after any accident or occurrence that results in an injury on the job as defined by the Occupational Safety and Health Administration. If drugs and/or alcohol are found in an employee's system, he or she may be terminated and forfeit eligibility for medical and indemnity benefits from Workers' Compensation insurance. Employees shall also be tested after the occurrence of any vehicular accident that occurs while on the job, regardless of whether a personal injury occurs. If drugs and/or alcohol are found in their system, they may be terminated.
- **Testing of Drivers** - All employees whose job entails driving Company vehicles or customer vehicles may be required to submit to drug testing on an annual basis, regardless of whether the employee has been involved in an on-the-job vehicular accident.
- **Additional Testing** - Additional testing may also be conducted as required by applicable state or federal laws, rules, or regulations.



Employee Retention and Benefits

The Budd Group realizes that hiring high quality employees and providing strong training programs is only part of the battle toward maintaining an excellent work force. In addition, it is essential to focus on employee retention and satisfaction. The Budd Group is committed to building a team of *Great People* by recruiting and hiring the most qualified, service-focused individuals to take care of our customers. We truly believe that our most valuable asset is our *Great People* and we treat them with the utmost respect.

We are a family-run business and that family atmosphere filters down to our workforce. **We offer competitive pay rates and benefits plans to all our employees.** In addition, we offer employees the opportunity for career advancement and we invest in them with job site education and ongoing training and development.

Wage Information

The Budd Group has developed a competitive wage scale based off the local employee market information plus our experience with several accounts we service within the state.

Low Turnover

The Budd Group is committed to keeping turnover low while consistently exceeding client satisfaction. The national average rate for turnover in the facility services industry is approximately 150%. The Budd Group understands that high turnover rates eventually lead to poor service performance, so we offer our employees a number of benefits that focus on keeping turnover rates low. These benefits include competitive pay rates, quality training and recognition for good performances. As a result, The Budd Group's turnover rate is substantially lower than the national average. After the 90 day transition program, The Budd Group's turnover rate is less than 60%, with management turnover of less than 6%.



Employee Retention and Benefits

Proposed Benefits

The following is a list of our current standard benefits for Budd Group employees at your facilities. These are our proposed benefits that are competitive for our industry. ***We are open to discussing other alternatives and are willing to tailor a benefit plan for our staff at your facilities.***

Health, Dental, Vision, Life, Accident and Disability Insurance Options

Full-time employees eligible to participate.

Several options and levels of coverage are available which includes: limited and major medical, dental, vision, accident, life and disability.

401(k)

Full-time employees eligible to participate

After one year of service, all full-time employees are eligible to participate in a 401(k) retirement plan.

Vacation

The vacation requirements are unique for the various clients we currently serve. The Budd Group will work with you to develop a customized vacation benefit program that meets your specific needs.

Referral Program

Full-time and part-time employees eligible

Employees are eligible to receive a \$50 referral fee when they refer a new employee that is hired to work at The Budd Group. The referral fee is paid after the first 90 days.

Holidays

Holiday pay will apply to the following eight (8) holidays where we pay all full-time employees their normal scheduled working hours at their normal pay rate.

Credit Union Membership

Budd Group employees have the opportunity to become a member-owner of our Credit Union partner. This membership gives our employees immediate access to the many benefits, including: free basic checking, savings options, and free online/mobile banking.



Employee Retention and Benefits

Proposed Benefits (continued)

Flexible Spending Account

A flexible spending account (FSA) allows associates to set aside pre-tax dollars for out-of-pocket medical, dental, vision and dependent care expenses.

Eligible expenses include:

- Doctor office visit co-pays
- Prescription drug co-pays
- Dental services
- Orthodontia
- Eye glasses
- Contacts and lens solution
- Eye surgery
- Daycare expenses

Uniforms

Provided at NO COST to the employees. Uniform includes polo type logo shirts and khaki style pants.

Special Incentives

- ▶ Employee of the Month
- ▶ Perfect Attendance Program
- ▶ Gift Certificates for Achievements
- ▶ Tickets to Local Athletic Event or Concert
- ▶ Safety Awards

RECOGNITION – “It Makes a Difference”

- ▶ New hire letter from Joe Budd
- ▶ Birthday card from management team
- ▶ Safety recognition for safe practices (Red/Green Card)
- ▶ Regular visits from executive team
- ▶ Personal letter from CEO/President – recognizes special efforts recognized by client or management team

Insurance Plans

The Budd Group offers a full suite of medical, dental, vision and life insurance plans for all employees. Please see the following page for an overview of our medical, dental, vision, accident, disability, and life insurance plans.



Employee Retention and Benefits

Summary of Benefit Offerings

The Budd Group is pleased to offer Medical, Dental, Vision, Life, and Accident options to all full time employees, after a 90 day new hire waiting period. The Budd Group has multiple eligibility groups that are based on our client's needs. Our leadership or supervisory package includes Medical, Dental, Vision, Life, Accident Insurance, Disability and FSA. Medical, Limited Medical, Flexible Spending, Dental and Vision coverage is offered through pre-tax payroll deductions. Life, Disability and Accident coverage is offered through post-tax payroll deductions.

BCBS Major Medical: The Budd Group offers coverage in a BlueCross BlueShield PPO 123 plan policy at a subsidized cost.

Stanley Flexible Spending Accounts: Dependent Care and Medical Flexible Spending accounts are offered.

Reliance Standard Limited Medical Policy: The limited medical policy offered is an affordable option for employees who want a medical policy, but choose not to purchase the BCBS major medical coverage.

Guardian Dental and Eyemed Vision: We offer affordable dental and vision policies that cover basic services for a low copay.

Lincoln Financial Group's Voluntary Employee, Spouse, & Child Life Insurance: Life insurance policies are available for employees and eligible dependents, for up to 5x the employee's annual salary.

Lincoln Financial Group's Voluntary Disability: Short Term and Long Term Disability policies cover 60% of an employee's salary during a qualified leave of absence.

Allstate Accident Policy: As a "gap" insurance option, we offer an Allstate policy that provides reimbursement for medical bills incurred due to an accident, and also proves reimbursement for 3 physicians visits per year, even if the appointment is not accident related.



Employee Retention and Benefits

Retention and Associate Incentive Plan

The Budd Group believes that it is essential to focus on employee retention and satisfaction. We are committed to building a team of Great People by recruiting and hiring the most qualified, service-focused individuals to take care of our customers. We truly believe that our most valuable asset is our Great People and we treat them with the utmost respect. The Budd Group also targets the following additional areas to minimize turnover as much as possible.

- ▶ Transfers/reassignment
- ▶ Flexible scheduling
- ▶ Opportunities for career advancement & promoting within
- ▶ Extensive employee orientation
- ▶ Supervisory leadership
- ▶ Multiple interviews w/ The Budd Group management team
- ▶ Merit and incentive pay through programs designed specifically for your facilities

While competitive wages are important, other factors influence an employee's job satisfaction. We have found much success in providing various benefits, recognition and incentive programs to our employees that have help to significantly reduce turnover. It starts with a simple philosophy, **“Retain your Employees, Retain your Customer.”** We will work with you to identify programs that make the most impact at your facilities. Some programs are standard with no additional cost and others are customized and funded by our clients. In addition to the standard benefits previously listed, we also offer:

- ▶ Employee of the Month/Quarter, Employee Appreciate Lunches
- ▶ Perfect Attendance Program, Monthly Gift Certificates for Achievements
- ▶ Tickets to Local Athletic Event or Concert
- ▶ Quality Assurance Award, Tuition Reimbursement
- ▶ On the Spot Awards - Part of the Budd Group Quality Assurance Program is the concept of “Catching someone doing something RIGHT.” Our management team provides on-the-spot recognition in the form of gift cards to recognize strong performance, provide a thank you or “just because”
- ▶ Safety Awards - The Budd Group actively promotes a safe working environment.

As part of our employee retention commitment, we also offer exceptional service recognition and safety programs, one-on-one training, employee and birthday recognition programs, and client-tailored processes and programs that have allowed us to retain our exceptional employees.



Employee Retention and Benefits

Retention and Associate Incentive Plan (continued)

Below is an overview of our Employee of the Month program. This program has been very successful at the other facilities we service.

Employee of the Month (Sample Plan)

All employees that meet the following qualifications/scoring will be entered into a drawing for the Employee of the Month Award which includes a certificate and a cash award (Visa gift card).

Qualifications/Scoring for employee of the month:

- **Attendance** - attendance is one of the primary components of the job. Employee of the month scoring recognizes this fact, so any employee that misses a day of work during the month, whether the day is excused or not, is eliminated from that month's drawing.
- **Quality of work** - the quality of work that an employee performs will be judged in two ways; inspections and complaints/compliments from building personnel. One complaint or one inspection score below 90 during the month, will eliminate that employee from the drawing.
- At the end of each month, all employees in each manager's area that have perfect attendance, have inspection scores of 90 or above, will be entered into the drawing. Employees that receive compliments from building personnel will have more entries placed in the drawing, thus increasing their chances for winning. A maximum of up to 10 entries per employee is allowed. One winner will be chosen in each area and the employee will be given a Visa Gift Card and a certificate.

It's our culture to reward and recognize employees for performing at praise-worthy levels. We work with employees and our clients to offer programs that meet everyone's needs and promote quality control. It's our policy to work with employees who do not meet quality expectations by offering additional training and coaching opportunities.

Alternative Benefits and Incentives

The Budd Group has presented an overview of our standard benefit plans. These plans have been established by our company to be cost effective and are competitive for our industry. However, we are open to work with you to customize plans that will enhance our benefit programs for our associates. This may include grandfathering (continuing benefits) of current staff, paying for holidays, additional vacation, or a contribution to associates toward a health or related company sponsored benefit plan. We welcome the opportunity to discuss this with you and share associated cost based on plan options selected.



Quality Assurance

7 Steps to Quality

Our basic operating principle can be best summed up in the words of our founder, Richard Budd, who said, “Do what you say you’re going to do.” This simple statement provides a powerful underlying principle that lies at the heart of our commitment to our customers. To meet this promise, The Budd Group utilizes a Quality Assurance Program based on the following seven fundamental tools.

1.) Proactive Communication

We know that the key to any successful service program is regular, proactive communication. That’s why from day one we establish consistent forms of communication with key staff members, our on-site team members and other key representatives. This will include, but is not limited to: weekly transition meetings before services start, weekly Budd Group on-site staff meetings after services start, monthly safety meetings and quarterly review meetings.

▶ QUALITY ASSURANCE AND SAFETY

2.) Key Performance Indicators (KPIs)

It is The Budd Group’s philosophy to continually measure our performance and improve our operations. We utilized KPIs to measure our success every day. Our team will work with you to establish KPIs which will include (but not limited too) the following: custodial inspection scores, work order closure rates, staffing levels, cost reductions and client surveys.

3.) Daily/Weekly Work Order Tracking and Reporting

Closing work orders in a timely manner will be paramount for our service program. Our on-site team will utilize a work order system for work order tracking and reporting. All key team members will have access to this system through their smart phone which will provide fast alerts of new work orders and quick communication once the order has been closed. The system also provides comprehensive work order reports which allow our team to focus on areas of improvement as they occur.

4.) Inspections

Scheduled and random inspections will be performed by our on-site management team on a daily basis. Data from these inspections will be collected through our cloud based system which allows any smart devices such as iPhone and iPads to be utilized for data collection. The system summarizes the data, calculates trends and measures our overall quality of the program. This allows our on-site team to quickly pinpoint areas for improvement and develop a plan of execution.



Quality Assurance

5.) Employee Team Meetings

Team meetings give The Budd Group the chance to review, with the on-site employees, areas of concern and opportunities for improvements. In addition, they allow the employees to give feedback or ask questions to help them to improve their work efficiency and effectiveness. Team meetings are also utilized to introduce any new safety or training topics.

6.) Customer Surveys

The Budd Group utilizes a cloud based customer survey program, which allows us to send survey requests to your employees. The responses we receive are quantified allowing us to measure the satisfaction of the individuals throughout your facilities. Survey feedback is incorporated into our on-going improvement plan with deficiencies addressed in writing via a formal action plan.

7.) Quarterly Review Meetings

Quarterly review meetings are held with The Budd Group and key contacts. The program review meetings allow The Budd Group to report any program accomplishments and areas for improvement. They also enable both organizations to establish priorities for the months ahead.

Implementation of Quality Program

Our Quality Program is implemented by our on-site management team along with our local and regional managers. In addition, our designated customer service associate and our corporate management team perform regular quality audits and customer visits to ensure the acceptable level of service is being performed throughout your facilities.

Reporting and Metrics for Key Performance Indicators

The Budd Group utilizes a number of key performance indicators (KPIs) to ensure that quality standards are met continuously. These KPIs are monitored (reviewed) on a weekly, monthly and quarterly basis depending on the category. The Budd Group will develop KPIs around the following categories:

- Work orders written by area
- Work orders completed and outstanding by areas
- Preventative maintenance status (overdue status)
- Repeat Failure analysis
- Cost reductions
- Staffing levels



Quality Assurance

Our team will also work with you to develop KPIs around the following best practice categories:

- Facility inspection scores (grounds and buildings)
- Employee survey scores
- Safety practices
- Sustainability practices
- Purchasing of supplies and materials
- Repairs and associated costs

The Budd Group utilizes a number of on-line reporting tools to provide real time information on the general performance of the account. The Budd Group is very open to working collaboratively with your team in developing or improving any type of KPI reporting system.



Quality Assurance

The Budd Group believes that the key to providing high quality service is to maintain strong communication with our clients. The Budd Group has invested in key technology tool that is a cloud based customer service tracking program, to facilitate open and accessible client communication. This technology tracks all cleaning work orders and collects all data for daily inspections.

Our quality/inspection system is easy to use, fast and effective. Our clients receive immediate attention, will be able to track the response efforts by The Budd Group and will have access to the entire message history for each request.



With this inspection technology, The Budd Group performs on-site inspections using mobile devices (such as iPad, iPhone, or Android) to let you know exactly what is happening and where. Any complaints are organized and distributed to those responsible so problems can be immediately resolved. Our clients can also create job schedules, manage work orders, track inventory and much more.

We provide you with the ability to:

- ✓ Submit a request directly to The Budd Group from your computer or smart device.
- ✓ Instantly notify all responsible personnel, allowing quick response time.
- ✓ Track the resolution and timeliness of your request.
- ✓ Access trend reports for quality inspections from your computer or smart device

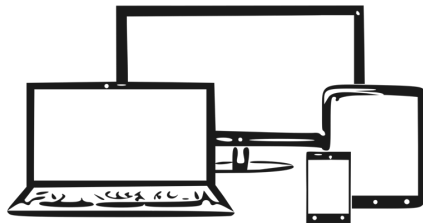


Quality Assurance

Mobile Surveys

The Budd Group's quality/inspection software also provides our customers with the ability to access custom surveys quickly by using a mobile device. This capability increases productivity by tracking trends in the data gained from surveys, making it faster and simpler to get the job done. Surveys can be assigned and completed with use a smart device. This serves to not only increase communication between The Budd Group and your organization, but also allows for greater trend-tracking by management.

- ✓ Employees and visitors can easily complete a mobile survey with their smartphone, give feedback and request immediate attention to any issue they observe.
- ✓ Mobile surveys help you to create a better experience for your employees and visitors.
- ✓ You can rest assured that The Budd Group will meet your expectations in a productive and time-efficient manner.



The Budd Group offers many unique value-added benefits that ensure quality assurance, and allow you to create a better experience for your employees and visitors.



Safety

The Budd Group Makes Safety a Priority!

Safety is a Core Value at the Budd Group; one that does not change over time. Our safety strategies, programs and priorities are designed to engage, educate and encourage employees to take responsibility for their own safety and the safety of those they work closely with. The consistent and constant pursuit of this company value empowers employees to recognize and communicate unsafe conditions and behaviors as well as to strive for an injury-free career at The Budd Group.

Safety Strategy

The Budd Group will foster a safe working environment for everyone. Our goal is zero accidents. To achieve this goal, we will:

- Promote safety awareness, education and engagement
- Involve, energize, encourage and expect management and employee responsibility for safety
- Identify, evaluate, communicate, correct and prevent hazards
- Analyze data to pinpoint and address trends
- Communicate standard safety procedures and reporting requirements
- Provide timely and appropriate training

Safety Compliance Program

The Budd Group is committed to maintaining health and safety standards equal to or better than those required by law. The Budd Group partners with public and private sector safety and loss control professionals to review, evaluate and focus our safety and health efforts. We are familiar and in complete compliance with OSHA, AHERA, SCDHEC, and EPA requirements and shall immediately report any injuries (major and minor) to the Project Manager and Site contact.

Safety Training for Employees

Using a variety of delivery tools, employees receive a safety and health orientation when they are first hired or assigned to work in a new area. They are trained on the specifications of their position, with emphasis upon the safest way to perform the essential functions of the job. All employees are trained in the application of chemicals and the use of equipment to facilitate safe conditions for the employees and visitors. Each employee is provided the necessary personal protective equipment and instructed on its use. We also enforce the use of personal protection equipment at all times. To maintain safety awareness and engagement throughout the year, The Budd Group delivers additional targeted safety content (training, activities, games and discussions) frequently.

Safety Leadership Team

At the Budd Group, our employees are our greatest asset and we have enhanced our commitment to safety through The Budd Group Safety Leadership Team (SLT). The SLT leads our initiatives in developing and implementing behavioral based safety practices and programs.



Safety

The SLT is comprised of leaders in our operations team, HR team, our Risk Management Partners (RMP), and our president, Yasser Youssef.

Our approach focuses on working together with our field and corporate teams to balance safety, quality, and productivity as the key to sustainable success in business. To that end, the SLT constantly solicits and evaluates employee feedback regarding health and safety, assisting our leadership team in evaluating employee feedback, identifying opportunities for improvements, creating solutions to address recurring and severe workplace hazards, and finally, designing and facilitating reasonable accountability measures for all our associates.

We are dedicated to further our journey of continuous improvement in all aspects of our business, especially your safety and welfare.



24/7 Injury Triage

Medcor's innovative telephonic injury triage service provides injury assessment for employees at workplaces that cannot support a medical clinic on-site. Medcor also provides appropriate treatment and referrals to employees. When an employee becomes ill or injured at work, a decision needs to be made about what should happen next. With Medcor Injury Triage, injured employees can speak over the phone with a specially trained nurse the moment after an injury occurs. Using Medcor's proprietary software, a triage nurse will assess the injury's severity and make recommendations for the best course of action. This service is provided 24 hours a day, seven days a week. Costly emergency room visits and unnecessary clinic visits are avoided, while needed treatments are obtained sooner because the nurse recommends the level of care that is most appropriate to meet the injured employee's needs. When off-site care is needed, Medcor makes appropriate referral recommendations to preferred providers. The results are reductions in claims, costs, and litigation. All calls are recorded to ensure quality care and deter fraud. Language translation is available as well.

Risk Management

The Budd Group utilizes risk management partners to assist us in safety/environmental compliance and for enhancing our safety processes and awareness companywide. Our risk management partners audit our sites to ensure we educate our staff in safe practices and customize training specific to the task and responsibilities.

Our risk management partners provide Safety, Training and Program Management to The Budd Group employees. A risk management team will assess current and previous loss history to determine the best use of risk management recourses. Their teams will work with us to promote safety, audit client sites, conduct accident reviews, identify training opportunities, and other safety related areas. Our risk management partners allow us to better understand and adapt quickly to your expectations.



Green Cleaning and Sustainability

The Budd Group is Committed to Sustainable Janitorial Services



As a member of the U.S. Green Building Council (USGBC), The Budd Group is dedicated to managing our business – and your facilities – in an environmentally responsible manner. Accordingly, it is our corporate policy to protect the quality and diversity of our environment and continually improve our performance with regards to sustainable and ecologically-sound best practices.



The Budd Group truly understands your commitment to sustainability and has enjoyed working with numerous facilities in implementing the program in the buildings we currently service. Much like the green trends for the industry, our sustainability program is ever changing and developing. The Budd Group looks forward to bringing new best practices and green solutions to you as they develop in the marketplace. Whether you are pursuing a particular LEED certification level or simply want to incorporate “greener” elements into the cleaning services, The Budd Group can reduce the environmental impact through our Green Programs that meet or exceed green cleaning standards for LEED certification. ***The Budd Group currently has a LEED GA certified manager on staff.***

The core practices of our current sustainability program include the following:

- Utilization of cleaning chemicals and consumables (paper and trash liners) which meet or exceed Green Sealed, Ecologo, EPA or Green Label standards.
- Utilization of microfiber technology for dusting and floor care. This includes microfiber cloths, hand held microfiber dusting tools, microfiber dust mops, and microfiber wet mops.
- Utilization of cleaning equipment that meet or exceed the standards for green cleaning of LEED certified buildings.
- Facilitate green cleaning training based upon “Healthy High Performance Cleaning” – a cleaning program designed to meet or exceed all standards for LEED certification.
- Energy conservation: utilizing day cleaning when possible and utilizing team cleaning so that minimum light and air conditioning is needed for night time cleaning.

When it comes to choosing the best cleaning solutions, practices, equipment, and personnel training, our Green Cleaning Program defines our commitment to environmentally conscious cleaning and sanitation procedures. The main goal is to promote and maintain a safe and healthy workplace while improving the environmental quality of our operations and the surrounding communities.



Green Cleaning and Sustainability

The Budd Group's foundational Green Cleaning Program was developed around the USGBC criteria and meets or exceeds all LEED EBOM requirements. It is our practice to customize the Green Cleaning Program around the goals and unique requirements of the individual client. Once the goals are established and the unique requirements are defined for the client, a customized green cleaning policy is developed and will address the following:

- ▶ **Sustainable Products:** All cleaning chemicals and consumables purchased will meet the criteria for Green Sealed, Ecologo, EPA, and Green Label. In addition, all cleaning chemicals and consumables purchased will utilize the "ready to dispense" system which uses chemical concentrates through a dilution system that minimizes chemical use/waste and reduces the amount of packaging used for the chemicals.
- ▶ **Sustainable Equipment:** All cleaning equipment purchases will meet the sustainability criteria as defined by USGBC. For example, all of our vacuums cleaners are certified by the Carpet and Rug Institute's "Green Label" testing program which means they meet the criteria for dust and sound levels. All cleaning clothes will be microfiber. This includes dusting cloths and mops (wet/dry).
- ▶ **Standard Operating Procedures:** A complete standard operating procedure (SOP) will be established for the account. The SOP will contain all the information for maintenance of equipment and the guidelines handling / storing of cleaning chemicals. A key component of the SOP will include our green cleaning training program called "Healthy High Performance Cleaning – Green Cleaning for Green Buildings". A sample copy of this program is separately attached. This program meets or exceeds all the criteria for every certification level of LEED and guarantees the most LEED points if a certification is pursued.
- ▶ **Training:** All green cleaning training will be based upon on our "Healthy High Performance Cleaning – Green Cleaning for Green Buildings" program. We will also provide complete training for the hazards, use, maintenance, disposal and recycling of cleaning chemicals.
- ▶ **Strategies for Promoting Hand Hygiene:** A complete hand hygiene strategy will be designed specifically for the facility and will give the client a number of options to follow such as touchless hand sanitizer dispensers.
- ▶ **Occupant Feedback:** As part of our program, The Budd Group will be requesting regular feedback from the building management team and the building tenants (if permitted). Feedback is facilitated using online surveys and regular quarterly meetings.
- ▶ **Documentation:** As part of our program, The Budd Group will maintain all the necessary documentation for LEED if a particular building is LEED certified – for example: training logs, equipment maintenance logs, sustainable purchases logs, etc. The Budd Group understands these LEED requirements and has the necessary experience to ensure that all information is documented correctly according to LEED standards.



Green Cleaning and Sustainability

CIMS and CIMS-GB with Honors Certifications

The Budd Group has been awarded the ISSA Cleaning Industry Management Standard (CIMS) and CIMS-Green Building (CIMS-GB) certifications with Honors for the 5th consecutive year. The Budd Group is thrilled to be recognized as a part of an elite group of successful, quality cleaning companies across the globe.



CIMS and CIMS-GB were created through a true consensus-based process, involving top organizations from the cleaning, facility management, and purchasing communities, in a true collaborative effort representing more than 100,000 industry constituents. Administered by ISSA® and the American Institute for Cleaning Sciences (AICS), CIMS and CIMS-GB focus on the essential elements of a well-run, customer-centered, and sustainable organization. Those organizations that wish to achieve certification must undergo a comprehensive on-site assessment by a fully independent and accredited assessor who evaluates the organization's compliance with the Standard.

CIMS is built around six areas of management best practices that have proven to be the foundation of high-performance, customer-focused, and sustainable cleaning. Independent, accredited assessors verify that The Budd Group has met the industry standard for the following:

- Quality Systems
- Service Delivery
- Human Resource
- Management Commitment
- Health, Safety & Environmental Stewardship
-  Green Building

It has since been and will continue to be our focus to ensure our quality of cleaning management exceeds that required from the CIMS Program.

Less than 80 companies within the United States have this level of certification.

The Budd Group adds value to our customers through our green operations:

- Complying with green product standards and certifications
- Securing valuable leed points for green cleaning activities
- Implementing sustainable cleaning programs
- Maintaining healthy, high-performance buildings



Green Cleaning Program and Sustainability



CIMS-GB standards are based upon the requirements for green cleaning for LEED set by the USBGC. This certification allows The Budd Group to provide customers with precisely what they need to secure points under the LEED for Existing Buildings: Operations and Maintenance (LEED-EBOM) Green Building Rating System, while greening their operations overall.

An overview of the Standard and Certification Program is available upon request.

Green Cleaning Training

For Green Cleaning training of our employees, The Budd Group utilizes Diversey's **"Healthy High Performance Cleaning,"** which encompasses *Green Cleaning for Green Buildings*. A complete copy of the training manual is available upon request. Test material for the certification is available upon request.

The Healthy High Performance Cleaning's training process reduces the negative impacts of cleaning on health and the environment. The program focuses in on 14 key areas:

- ▶ People with Special Needs
- ▶ Dusting and Dust Mopping
- ▶ Entryways
- ▶ Floor Care
- ▶ Carpet Care
- ▶ Restrooms
- ▶ Food Areas
- ▶ OSHA Blood-Borne Pathogen Standard
- ▶ Measuring & Diluting Concentrated Cleaning Products
- ▶ Indoor Plants
- ▶ Integrated Pest Management
- ▶ Recycling
- ▶ Spills
- ▶ Trash

**Caring
for a
healthy
future**



The training material for Healthy High Performance Cleaning is accepted by the USGBC for their LEED certification program of buildings. This training program is also accepted as a certified cleaning system for indoor air quality by GreenGuard (www.greenguard.org).



Implementation Plan

Phase I: Prior to Contract Start-up

I. Customer

- ▶ Designate representative(s) to be contacts for The Budd Group
- ▶ Organization of keys and access to facilities
- ▶ Prepare checklist of all contractor responsibilities
- ▶ Coordinate required training for The Budd Group employees

II. The Budd Group:

- ▶ Review the Customer's operating procedures and policies
- ▶ Deploy the management team to help support and organize the opening process
- ▶ Designate a working supervisor for job site
- ▶ Coordinate opening process with local office:
 - Interview existing qualified and experienced employees
 - Hire all personnel/supervision
- ▶ Schedule start-up meeting(s) with facility representatives
- ▶ Review existing vendor contracts
- ▶ Develop job descriptions for on-site housekeepers/grounds/maintenance technicians
- ▶ Purchase equipment and supplies
- ▶ Coordinate with site representatives on all special procedures; i.e., safety, rules and regulations
- ▶ Orientation of all personnel and begin training necessary for start-up
- ▶ Adapt quality control process to specifically meet the needs of each facility

Phase II: Start-up – The Budd Group

- ▶ Management team on site
- ▶ Establish follow-up with campus representatives
- ▶ Inspect all phases of operation and review existing facilities

Phase III: Follow-up – The Budd Group

- ▶ Scheduled meeting(s) with campus representatives to review progress, fine-tune operation
- ▶ Review inspection process for quality results
- ▶ Evaluate personnel performance
- ▶ Follow-up training



Equipment, Chemicals and Supplies

Our cleaning equipment program is designed specifically for the LEED certification program. Everything from high speed buffers with dust control to HEPA vacuum cleaners that meet Carpet and Rug Institute (CRI) standards are a part of our program.

If any additional equipment is needed, we are able to purchase equipment through Windsor under The Budd Group's national agreement. As a part of this agreement, National Sales Support provides under and out of warranty service and support. All major equipment is scheduled for quarterly PM Service and will be repaired as needed at other times. The Account Management on a monthly basis will inspect all equipment and any repairs are scheduled immediately. Any equipment with repairs that will cause unsafe or OSHA issues will be tagged and removed from service until repaired. When a piece of equipment becomes unrepaired and is void of its Green Seal or Energy Star certification, it will be replaced with new equipment and maintained as stated above.

Specification sheets for equipment are available upon request. We are open to work with you to determine a plan to utilize any existing equipment and work through any cost reductions/additions accordingly.

Floor Care Cleaning Techniques

The Budd Group has teamed with Diversey, who is a national leader for production of Green Sealed cleaning chemicals to develop a comprehensive green cleaning solution. The Budd Group will utilize Diversey's Floor Care Manual to ensure that your floors are consistently cleaned and maintained at the highest level.

A copy of the Diversey Floor Care Manual, which gives an overview of the cleaning techniques The Budd Group utilizes for the cleaning of all floor types, is available upon request.



Equipment, Chemicals and Supplies

Equipment Maintenance

The Budd Group understands that the procurement and maintenance of all equipment required for the successful execution of this contractual obligation shall be the contractor's responsibility.

As part of our commitment to meet your requirements and exceed your expectations, The Budd Group has partnered with TecServ to ensure that our equipment is maintained and replaced in a timely manner.



TecServ is the leading provider of equipment repair and maintenance. With over 35 years of experience, TecServ has more than 400 professionally trained and strategically placed technicians to service and maintain equipment.

TecServ has:

- Fully stocked vehicles for on-site repairs
- A toll-free call center that is available 24/7 to accept service requests and to provide The Budd Group peace of mind
- Asset management, historical records, and "live" call updates that are available through a state of the art dispatch system
- "NEW" Web Portal that provides instant access to all service calls and historical information all from one location with the click of a button

Through TecServ, our equipment is covered for all breakdowns and it's maintained through a quarterly preventative maintenance program. TecServ's extensive direct labor technicians provide The Budd Group with immediate service updates and the ability to handle "Emergency" calls, ensuring that our customers' facilities are cleaned with the best equipment and our quality of service is never compromised.



Equipment, Chemicals and Supplies

The Budd Group has teamed with Sealed Air to develop a comprehensive green cleaning solution.

All cleaning chemicals that The Budd Group utilizes for the daily cleaning meet the criteria for Green Sealed, EcoLogo, EPA, and Green Label. In addition, all cleaning chemicals utilize the “ready to dispense” system which uses chemical concentrates through a dilution system that minimizes chemical use/waste and reduces the amount of packaging used for the chemicals.

The Budd Group has a strategic partnership with SupplyWorks and Sealed Air to furnish our service team with the necessary supplies and materials to meet the needs of your site. SupplyWorks and Sealed Air bring the necessary resources to The Budd Group that allows us opportunities to test and utilize the newest technologies throughout the cleaning industry today.



Our partnership with SupplyWorks provides our clients with a unique, flexible, certification program called CleanZone. CleanZone is designed to create a healthy workplace through the implementation of environmentally preferred products and procedures. With the CleanZone certification, facilities have implemented a number of green practices and materials that mitigate health risk and save money.

Our selection of cleaning products is determined by janitorial line of business leadership team and SupplyWorks. We realize every facility is unique and work with each Client and our local management team to identify any chemicals, supplies, or unusual processes that may be required and identify usages prior to start of services.

The USGBC requires that 90% of chemicals purchased each year must meet either a Green Seal or EPA standard. Our chemical program is designed to meet all the requirements for LEED certification. The Budd Group is currently using “Green Seal” cleaning chemicals for our general cleaning solutions. The Green Seal options for floor care are optional and can be utilized upon request and any additional cost will be billed back to the customer.

All of our chemicals are purchased from Sealed Air, a national leader in cleaning chemicals. MSDS (SDS) sheets for each of the products we use are available upon request.





Section D

- ▶ Names, qualifications and experience of personnel to be assigned to the contract



Our Services Begin with Great People

Experienced and dedicated on-site management is the key to success for all of our facility programs. Your program includes a staffing plan which assigns highly trained experts to your facilities. We will self-perform all services as outlined in the scope of work requirements and will not subcontract.

The Budd Group also provides management support for your account on a local, regional and corporate level. Our goal is to provide redundancy of oversight and a highly reliable service program. In addition to our on-site janitorial team, you will receive extensive support and customer service from the following local management team members.

The following local managers will support your facilities on a weekly and monthly basis:

Damon Scott	Implementation/Education Specialist
Sam Ross	Area Operations Manager
Greg Stump	Regional Director of Janitorial Operations
Donna Odom	Field Services Coordinator
Vanita Davis	Business Analyst
Katie McConnell	Customer Service Manager
Jon Larsen	COO and Executive Sponsor





Section E

- ▶ Resumes of key managers and supervisors, as well as the person at corporate who will be responsible for the overall contract, to be assigned to the contract



Below is an overview of the key local and regional management personnel who will be responsible for the performance of the Longwood University contract:

Greg Stump, Regional Manager

- Over 20 years of operations and sales experience in business and facility services industries.
- Facilitates inspections with Account Manager.
- Provides training services to dedicated Account Manager and on-site staff.
- Employee recruitment, orientation, and training.
- Certified Building Service Executive (CBSE) - the most prestigious symbol of excellence in the building service contracting industry.

Sam Ross, Senior Operations Manager

- Over 12 years of experience in customer service and facility management services.
- Certified in all green cleaning chemical training with Johnson Diversity.
- Facilitates weekly inspections with on-site supervisors for each campus
- Specification development (changes, additions, or deletions).
- Provides training services to on-site supervisors and on-site staff.



Site Based Account Manager's Job Description

SUMMARY: Oversees and directs the Facility Custodial Operations function for the client by performing the following duties personally or through a team of direct support staff and vendor partners, in an efficient and economic manner, so that all students, administration, staff, and visitors are assured of a clean, safe, attractive, and healthy place in which to learn, work and live.

JOB DUTIES:

- Manages, coordinates, and exercises functional responsibility for facility custodial management operations services within the campus which includes building, grounds and fleet maintenance, janitorial services; responsible for the overall direction, coordination, and evaluation of these areas related to custodial services.
- Ensures client satisfaction with the facility custodial management and plant function and sees that contractual obligations are being met and expected benefits are realized.
- Develops and maintains effective working relationships with client leadership teams, operational teams, faculty and staff, with the overall objective of enhancing the long-term educational experience of the students.
- Leads team of managers, supervisors, and administrative assistants by conducting regular meetings to review service expectations, brainstorm, and problem solve, etc.
- Identifies specific individual training and development needs, provides bonus plan recommendations, and conducts performance reviews and other HR duties for direct report staff.
- Establishes/maintains custodial standardization and consistency with best-in-class educational facility management and plant operations practices, including financial and physical maintenance.
- Provides input and direction regarding issues as requested by the client, managers and supervisors.
- Coordinates facility custodial management reporting per needs of the client, including monthly accounting and operational updates and issues.
- Documents cost avoidance and savings.
- Manages monthly CMMS reporting and tracking, continuously analyze CMMS data to benchmark operations and drive improvement.
- Performs and documents scheduled custodial inspection of facilities.
- Prepares, submits and manages facility operating, capital and PPRSM budgets with client's goals and objectives addressed, tracks variances and adjusts spending as necessary.
- Oversees all activities which could impact the uptime custodial operational posture of the facilities.
- Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws including interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.
- Manages other duties as assigned.



MINIMUM REQUIREMENTS:

- 10+ years' custodial experience in educational, industrial, commercial, or office (excluding residential, hotel experience) facility management (operational experience is preferred) 5+ years of leadership experience leading exempt-level employees.
- Experience with preparation of, and adherence to, annual facility custodial budgets.
- Project Management experience.
- Bachelor's degree (B.A. or B.S.) from four-year college or university a plus.
- Experience with PPRSM (Provision for Plant Replacement, Renewal and Special Maintenance) budget management and administration a plus.
- Experience with APPA educational facilities management program a plus.
- Proven ability to successfully lead a team.
- High proficiency in MS applications including Word, Excel, and Outlook.
- Strong interpersonal and problem-solving skills.
- Excellent verbal/written communication and presentation skills.
- Proven record of providing excellent customer service.
- APPA Certified Educational Facilities Professional (CEFP), BOMI Real Property Administrator (RPA) designation, IFMA Certified Facility Manager (CFM®), and/or IREM Certified Property Manager (CPM®) designation(s) preferred. The above referenced position summary is a guideline designed to present an overview of the job duties and is not intended to be a comprehensive list of responsibilities and requirements.

I have read and understand the duties of the job listed above and have been given a copy of my job description. I understand that the duties of this job may be changed and/or modified at any time.

Signature

Date

Print Name



Job Descriptions for Working Personnel

General Cleaner

Position Summary: Keeps premises of commercial or institutional building in clean, safe and orderly condition by performing the following duties

Position Responsibilities: Include any or all of the following. Other duties may be assigned by supervisor.

- The general cleaner cleans offices, hallways, lobbies, lounges, rest rooms, corridors, elevators, stairways, locker rooms, and other areas. Replenishes paper and soap products in bathrooms, cleans mirrors, walls, showers, sinks, metal work and toilets. Empties wastebaskets, and empties and cleans ashtrays. Transports trash and waste to disposal area.
- Sweeps, mops, vacuums and/or refinishes floors. Cleans rugs, carpets, upholstered furniture, and draperies. Washes walls, ceilings, vents and woodwork. Washes windows, blinds, door panels, ledges and sills. Cleans water fountains. Dusts furniture, light fixtures, and equipment. Replaces light bulbs.
- Assists in project cleaning, which includes lifting and removing furniture from rooms. Provides assistance with any outside cleaning, which may include sweeping sidewalks and picking up trash.
- Operates various types of equipment and machinery, which include wet vacuums, hand trucks, vacuum cleaners, carpet extractors, floor buffers, automatic scrubbers, etc.
- Assists in the completion of the workload in the absence of other service workers.
- Reports any malfunctions / maintenance problems to the supervisor. Discusses work problems and/or schedule problems with supervisor and / or management. May be required to lock and / or unlock doors. Attends training meetings and sessions as directed.



Lead Person

Position Summary: Provides supervision over a small team who keeps premises of commercial or institutional building in clean, safe and orderly condition by performing the following duties

Position Responsibilities: Include any or all of the following. Other duties may be assigned by supervisor.

- The Lead Person is a working supervisor who cleans offices, hallways, lobbies, lounges, rest rooms, corridors, elevators, stairways, locker rooms, and other areas. Replenishes paper and soap products in bathrooms, cleans mirrors, walls, showers, sinks, metal work and toilets. Empties wastebaskets, and empties and cleans ashtrays. Transports trash and waste to disposal area.
- Sweeps, mops, vacuums and/or refinishes floors. Cleans rugs, carpets, upholstered furniture, and draperies. Washes walls, ceilings, vents and woodwork. Washes windows, blinds, door panels, ledges and sills. Cleans water fountains. Dusts furniture, light fixtures, and equipment. Replaces light bulbs.
- Assists in project cleaning, which includes lifting and removing furniture from rooms. Provides assistance with any outside cleaning, which may include sweeping sidewalks and picking up trash.
- Operates various types of equipment and machinery, which include wet vacuums, hand trucks, vacuum cleaners, carpet extractors, floor buffers, automatic scrubbers, etc.
- Assists in the completion of the workload in the absence of other service workers.
- Reports any malfunctions / maintenance problems to the supervisor. Discusses work problems and/or schedule problems with supervisor and / or management. May be required to lock and / or unlock doors. Attends training meetings and sessions as directed.

Floor Technician

Position Summary: Floor Technicians are generally responsible for the overall floor maintenance of hard surface and carpet (stripping, waxing, buffing, shampooing, extraction & bonneting) of areas that include offices, patient rooms, classrooms, corridors, lobbies, entrances, stairwells and other public areas such as cafeterias. Other required duties may be assigned by the supervisor such as light maintenance (bulb changing, etc.).

Position Responsibilities: Include any or all of the following. Other duties may be assigned. Job description subject to change.

- This job requires the use of specialized, power equipment.
- Perform preventative maintenance check on all equipment prior to use.
- Floors care, including routine mopping (dry and damp), buffing and burnishing on hard surface floors and stairwells.
- Maintenance of floor care equipment
- Other duties as assigned by supervision or management.



Supervisor

Position Summary: The Supervisor oversees all employees engaged in cleaning and maintaining premises of commercial or institutional buildings.

Position Responsibilities: Include any or all of the following. Other duties may be assigned. Job description subject to change.

- Resolves and responds to employee and customer issues.
- Assigns tasks to workers and inspect completed work for conformance to standards.
- Oversees and follow up on safety requirements with new employee including site-specific training.
- Purchases, issues and orders necessary supplies and equipment and ensures that all equipment is in good operating condition.
- Records employees' hours worked or supervise the time keeping.
- Performs the duties of workers they supervise if needed.
- Responsible for site inspections and send to customers updated monthly reports on the condition of the building or work in progress.

Supervisory Responsibilities: Supervises number of employees. Carries out supervisory responsibilities in accordance with the organizations' policies and applicable laws.





Section 4

▶ Small Business Subcontracting Plan- ATTACHMENT A



ATTACHMENT B – SMALL BUSINESS SUBCONTRACTING PLAN

Definitions

DSBSD: Department of Small Business and Supplier Diversity.

Small Business: “Small Business” means an independently owned and operated business which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years. Note: This shall not exclude DSBSD-certified women- and minority-owned businesses when they have received DSBSD small business certification.

Women-Owned Business: Women-owned business means a business concern that is at least 51% owned by one or more women who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, or in the case of a corporation, partnership or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, and both the management and daily business operations are controlled by one or more women who are citizens of the United States or non-citizens who are in full compliance with the United States immigration law.

Minority-Owned Business: Minority-owned business means a business concern that is at least 51% owned by one or more minority individuals or in the case of a corporation, partnership or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals and both the management and daily business operations are controlled by one or more minority individuals.

All small businesses must be certified by DSBSD by the due date of the solicitation to participate in the SWaM program. Certification applications are available through DSBSD online at www.dmbv.virginia.gov (Customer Service).

Offeror's Name: N/A

Preparer Name: Ratie McConnell **Date:** 07/17/2018



Instructions

- A. If you are certified by DSBSD as a small business, complete only Section A of this form. This shall not exclude DSBSD-certified women-owned and minority-owned businesses when they have received DSBSD small business certification.
- B. If you are not a DSBSD-certified small business, complete Section B of this form. For the offeror to receive credit for the small business subcontracting plan evaluation criteria, the offeror shall identify the portions of the contract that will be subcontracted to DSBSD-certified small business in this section. Points will be assigned based on each offeror's proposed subcontracting expenditures with DSBSD-certified small businesses for the initial contract period as indicated in Section B in relation to the offeror's total price.

Section A

If your firm is certified by DSBSD, are you certified as a **(check only one below)**:

☐ Small Business Certification Number: _____
☐ Small and Women-owned Business
☐ Small and Minority-owned Business
 Certification Date: _____



Section B

Populate the table below to show your firm's plans for utilization of DSBSD-certified small businesses in the performance of this contract. This shall not exclude DSBSD-certified women-owned and minority-owned businesses when they have received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.

Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement

Small Business Name & Address DSBSD Certificate #	Status if Small Business is also: Women (W) Minority (M)	Contact Person, Telephone & Email	Type of Goods and/or Services	Planned Involvement During Initial Period of the Contract	Planned Contract Dollars During Initial Period of the Contract
Spotless Window Cleaning Company. 5321 Distributor Drive. Richmond VA 23225 SWAM # 658138	Small	Kevin Carpenter 804-231-0749 sales@spotlesswindowcleaning.com	Building Cleaning (Exterior) , Window Washing, Waxing, Polishing, Steam Cleaning	Interior and Exterior Window Cleaning Two Times per Year per RFP.	5.4% \$92,400.00
Diamond Paper Company. 802 Monument Street Danville VA 24541 SWAM # 652826	Small	Daniel Ware 434-793-4421 diamondpaper@dpaper.net	Paper & Consumables	Provides all consumable products listed per the RFP.	5.3% \$91,035.00
Excel Management Services 200 East Cary Street, Richmond, VA 23219 SWAM #005396		Billie Brown 804-771-9680 Billie.excel@verizon.net	Labor	Provider of labor services and solutions	31.3% \$563,247.72
Totals \$					\$746,682.72





Section 5

▶ FINANCIAL PROPOSAL



5. The Budd Group's Financial Proposal

The Budd Group shall employ all labor and supervision necessary for the operations of this contract and pay employees in accordance with the Fair Labor Standards Act as amended or any other applicable statutes. The fiscal arrangement set forth in this proposal is based on existing or requested client conditions (personnel requirements, procedures submitted, etc.) and levels of labor cost (wage expectations); commodity cost; federal, state and local payroll taxes; minimum wages; health insurance premiums; and license fees now in effect. In the event of a material change in these items, the fiscal arrangement shall be negotiated to reflect such change, upon a mutually agreeable basis.

Total Annual Cost: \$1,777,816.00

- A. Basic Custodial Services
 - 1. Residential Facilities: \$203,508.46
 - 2. Academic/Administrative Office Buildings: \$776,472.19
 - 3. Athletic Facilities: \$160,544.28
 - 4. Health & Fitness Center, Campus Recreation and Midtown Fitness Performance Center: \$16,947.35
 - 5. University-Owned Rental Property: \$59,768.75
 - 6. LU REF Properties: \$88,575.27
- B. Special or Emergency Cleaning: \$3,600.00
- C. Spot Upholstery and Curtain/Drapery Cleaning: \$15,600.00
- D. Floor Matting: \$17,464.00
- E. Trash Collection: \$38,500.00
- F. Collection and Process of Recyclables: \$38,500.00
- G. Light Bulb Maintenance: \$16,500.00
- H. HVAC Filter Maintenance: \$16,500.00
- I. Pest/Varmint Control: \$11,748.00
- J. Exterior Window Cleaning: \$96,800.00
- K. On-Demand Custodial Services: \$18.00 per hour, per person
- L. Overhead (Site Based Management Staff, Area Operations Support, Implementation Manager, Executive Support for Quarterly Business Review Meetings): \$216,788.52





▶ APPENDIX

- ✓ Sample Implementation Plan
- ✓ Employee Recognition Program
- ✓ Employee Care Fund
- ✓ Sample Quarterly Business Review Agenda



SAMPLE Implementation Plan

Item #	CATEGORY	ACTION	RESPONSIBLE	TACTIC	START DATE	Target Complete Date	ACTUAL Complete Date	Landscaping Solutions	Maintenance Solutions	Janitorial Solutions	PROGRESS or COMMENTS
19	Uniforms	Requirements Gathering	Branch/Operations Manager	Determine Client requirements for EE uniforms.	23-Feb-16	23-Feb-16	23-Feb-16	X	X	X	<Here> Client Specific Notes - Developed After Agreement
20	Uniforms	Management	Branch/Operations Manager	Select Management Uniforms	23-Feb-16	23-Feb-16	23-Feb-16	X	X	X	Oxfords with Logo and Name (typically)
21	Uniforms	Hourly EE's	Branch/Operations Manager	Select Hourly EE's Uniforms	23-Feb-16	23-Feb-16	23-Feb-16	X	X	X	Polos, Smocks, Lab coats, etc...
3	Human Resources	Current EE Retention	Branch/Operations Manager, FSC	Conduct Hiring event/meeting for current EE's the client wishes to retain.	24-Feb-16	24-Feb-16	24-Feb-16	X	X	X	<Here> Client Specific Notes - Developed After Agreement
1	Human Resources	Current EE Retention	Implementation Manager, Sales	Determine client requirements for retaining any of their current Employee's.	15-Feb-16	26-Feb-16	3/4/2016	X	X	X	<Here> Client Specific Notes - Developed After Agreement
2	Human Resources	Current EE Retention	Implementation Manager, Branch/Operations	Schedule hiring event/meeting for current employee's the Client wishes to retain.	22-Feb-16	26-Feb-16	3/4/2016	X	X	X	<Here> Client Specific Notes - Developed After Agreement
4	Human Resources	Current EE Retention	Branch/Operations	Extend Offers to Current EE's.	26-Feb-16	26-Feb-16	3/4/2016	X	X	X	<Here>
16	Communications	Disaster Recovery / Emergency Response	Implementation Manager, Sales	Establish Client Specific Emergency Management / Disaster Recovery plan.	26-Feb-16	26-Feb-16		X	X	X	Utilize Budd recommended plan with Client Sign-Off if Client has no plan in place.
22	Uniforms	Ordering	Branch/Operations Manager	Order ALL required Uniforms	26-Feb-16	26-Feb-16	7-Mar-16	X	X	X	Order a few extra Uniforms where Budget's allow for Emergency/Accident situations
26	Equipment	Requirements Gathering	Branch/Operations Manager	Create list of ALL equipment needs	23-Feb-16	26-Feb-16	3/7/2016	X	X	X	Include proper PPE's
31	Supplies	Requirements Gathering	Branch/Operations Manager	Prepare Supplies list of all required Supplies	23-Feb-16	26-Feb-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement"
34	Supplies	Procurement	Branch/Operations Manager	Create an on-going account with Supplies provider for replenishing orders	22-Feb-16	26-Feb-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement"
36	Supplies	Inventory Process	Branch/Operations Manager	Establish ordering protocol	22-Feb-16	26-Feb-16		X	X	X	Who places orders, (and a back-up) How orders are placed, (must include evaluation of
37	Supplies	Safe Storage Procedure	Branch/Operations Manager	Create a Safe Storage Procedure for all Chemicals	22-Feb-16	26-Feb-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement"
38	Supplies	Chemical Spill Containment	Branch/Operations Manager	Establish a Chemical Spill Containment plan	22-Feb-16	26-Feb-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement"
40	Financial & Administrative	Accounting	Implementation Manager, Branch/Operations	Determine the Billing Protocol	23-Feb-16	26-Feb-16		X	X	X	Billing Frequency Invoice Format Bill To information
73	Training	Maps	Implementation Manager,	Secure maps for ALL EE's of the facility	23-Feb-16	26-Feb-16		X	X	X	Maps should be in color if possible Maps should contain identifying factors, (room
74	Training	Workflow	Implementation Manager,	Determine and document employee workflow	23-Feb-16	26-Feb-16		X	X	X	This is the manner with which the teams or individuals will clean most efficiently.
5	Human Resources	Current EE Retention	Branch/Operations Manager, FSC	Receive Acceptance of Offers from Retained EE's.	2-Mar-16	2-Mar-16		X	X	X	EE's must successfully pass drug screening and background check.
27	Equipment	Procurement	Branch/Operations Manager	Place equipment orders and arrange for delivery solutions	29-Feb-16	2-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
32	Supplies	Procurement	Branch/Operations Manager	Place orders for Start-Up quantities of Supplies and arrange for delivery solutions	29-Feb-16	2-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement"
6	Human Resources	Current EE Retention	FSC	Process background checks and Drug Screenings for current EE's the client wishes to retain.	3-Mar-16	4-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
8	Human Resources	Staffing Plan	Branch/Operations Manager, FSC	Determine any remaining hiring needs for staffing plan after Current EE's slated for retention complete Everify and background checks.	4-Mar-16	4-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
9	Human Resources	Staffing Plan	Branch/Operations Manager, FSC	Initiate hiring efforts	22-Feb-16	4-Mar-16		X	X	X	Utilize online resources, staffing agencies, sub-contractors, etc...
15	Human Resources	Staffing Plan	Implementation Manager,	Identify and solution ALL remaining staffing needs	4-Mar-16	4-Mar-16		X	X	X	This item is not complete until ALL staffing needs are fulfilled.
7	Human Resources	Current EE Retention	FSC	eVerify Retained EE's.	7-Mar-16	9-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
10	Human Resources	Staffing Plan	Branch/Operations Manager, FSC	Interview and process applicant pool of non-current EE's.	7-Mar-16	9-Mar-16		X	X	X	(Account for additional personnel to fill-in for absent EE's)
12	Human Resources	Staffing Plan	Branch/Operations Manager, FSC	Make job offers to non-current EE's	9-Mar-16	9-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement

SAMPLE Implementation Plan

Item #	CATEGORY	ACTION	RESPONSIBLE	TACTIC	START DATE	Target Complete Date	ACTUAL Complete Date	Landscaping Solutions	Maintenance Solutions	Janitorial Solutions	PROGRESS or COMMENTS
41	Quality Assurance	Quality Plan	Implementation Manager	Schedule training for Quality Plan and Landscape Maintenance Log	7-Mar-16	9-Mar-16		X	X	X	Training should include both EE's AND Client.
43	Quality Assurance	Client Surveys	Branch/Operations Manager	Create Client Specific / Location Specific Site Surveys	7-Mar-16	9-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
50	Quality Assurance	Site Inspections	Branch/Operations Manager	Establish a protocol for Budd site inspections	7-Mar-16	9-Mar-16		X	X	X	Identify who will be conducting the inspections. Set expectation with client that each site inspection
51	Quality Assurance	Salesforce1	Regional SF Expert	Set up Salesforce1 inspection tool	7-Mar-16	9-Mar-16				X	<Here> Client Specific Notes - Developed After Agreement
52	Quality Assurance	CIMS Binder	Implementation Manager	Verify completion of CIMS / Procedures binder	7-Mar-16	9-Mar-16				X	Use CIMS Audit Checklist as a measure of completeness.
54	Quality Assurance	Training	Implementation Manager	Verify that all Training materials are ready for presentation	7-Mar-16	9-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
11	Human Resources	Staffing Plan	FSC	Process Background checks for non-current EE's.	10-Mar-16	11-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
13	Human Resources	Staffing Plan	Branch/Operations Manager, FSC	Receive Job offer acceptance for non-current EE's	11-Mar-16	11-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
14	Human Resources	Staffing Plan	FSC	Process Drug Screenings and Everify for non-current EE's.	14-Mar-16	14-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
80	Training	Ehub	Branch/Operations Manager	Schedule Manager Ehub Training	14-Mar-16	15-Mar-16		X	X	X	Requires participation from Accounting
42	Quality Assurance	Quality Plan	Implementation Manager	Conduct training for Quality Plan	14-Mar-16	16-Mar-16		X	X	X	Training should include both EE's AND Client.
75	Training	Program Development	Implementation Manager,	Create Training Programs for all requirements	14-Mar-16	18-Mar-16		X	X	X	Training Programs should consist of, but not be limited to:
76	Projects	Punch Lists	Implementation Manager,	Develop individual "punch list" for each location Monthly and Quarterly Landscape Audit	14-Mar-16	18-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement"
66	Job Start-Up	Keys	Implementation Manager	Receive final sign off that all Keys are identified and are ready for use	22-Mar-16	22-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
67	Job Start-Up	CIMS Binder	Implementation Manager	Presentation of CIMS/Procedures binder to client	22-Mar-16	22-Mar-16				X	<Here> Client Specific Notes - Developed After Agreement
24	Uniforms	Distribution	Implementation Manager, Branch/Operations Manager	Schedule Uniform Distribution Meeting	23-Mar-16	23-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
76	Training	Training Sessions	Branch/Operations Manager	Conduct Training Sessions	23-Mar-16	23-Mar-16		X	X	X	Receive sign off from ALL EE's upon completion of training
77	Training	Walk Thru	Branch/Operations Manager	Conduct Site Walk Thru with EE's to introduce site and review most efficient site workflow process	23-Mar-16	23-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
79	Training	Computer Smart Phones	Implementation Manager, Branch/Operations Manager	Conduct any required computer, software, smart phone, application training	21-Mar-16	25-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
81	Training	Ehub	Accounting	Conduct Managers Ehub Training Webinar	21-Mar-16	25-Mar-16		X	X	X	Requires participation from Accounting
23	Uniforms	Ordering	Branch/Operations Manager	Receive ALL required Uniforms	28-Mar-16	28-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
25	Uniforms	Distribution	Branch/Operations Manager	Conduct Uniform Distribution Meeting	30-Mar-16	30-Mar-16		X	X	X	Discuss Appearance expectations.
29	Equipment	Procurement	Branch/Operations Manager	Receive all equipment	28-Mar-16	3/30/2016		X	X	X	<Here> Client Specific Notes - Developed After Agreement
33	Supplies	Procurement	Branch/Operations Manager	Receive all Start-Up supplies	28-Mar-16	30-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement"
63	Job Start-Up	Management	Implementation Manager	Verify that Budd Group Management Team is on site for Job Start	30-Mar-16	30-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement

SAMPLE Implementation Plan

Item #	CATEGORY	ACTION	RESPONSIBLE	TACTIC	START DATE	Target Complete Date	ACTUAL Complete Date	Landscaping Solutions	Maintenance Solutions	Janitorial Solutions	PROGRESS or COMMENTS
60	Job Start-Up	Final Review	Implementation Manager	Conduct final inspection of all site materials for readiness	31-Mar-16	31-Mar-16		X	X	X	Equipment Start-Up Supplies
61	Job Start-Up	Staffing	Implementation Manager	Final Review of all staffing positions to ensure that each position is filled and trained	31-Mar-16	31-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
62	Job Start-Up	Management	Implementation Manager	Schedule Budd Management team to be on site for Job Start	31-Mar-16	31-Mar-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
78	Training	Janitorial Closets	Branch/Operations Manager	Stock all janitorial closets on walk thru's	30-Mar-16	1-Apr-16				X	Put all Equipment and Chemical/Supplies in place during this time. This ensures EE's know where everything is located and how to get there.
18	Communications	Action Plans	Branch/Operations Manager	Create Location Specific Action Plans (30/60/90 day plans)	12-Apr-16	12-Apr-16		X	X	X	Plans include but are not limited to: KPI's, Staffing, Changes in Scope, etc...
56	Quality Assurance	Site Audit	Implementation Manager	Schedule 90 day site audit	30-May-16	30-May-16		X	X	X	<Here> Client Specific Notes - Developed After Agreement
58	Quality Assurance	Compliance Audit	Implementation Manager	Schedule Compliance Audit	30-May-16	30-May-16		X	X	X	Must occur 4 weeks after Start Date
57	Quality Assurance	Site Audit	Implementation Manager	Conduct 90 day Site Audit	6-Jun-16	6-Jun-16		X	X	X	Procedures in place and executed, CIMS, RMP Safe Practices
59	Quality Assurance	Compliance Audit	Implementation Manager	Conduct Compliance Audit	6-Jun-16	6-Jun-16		X	X	X	Must occur 4 weeks after Start Date
30	Equipment	Evaluation Process/Schedule	Implementation Manager,	Establish a schedule and process for regular equipment reviews identifying defective equipment and unsafe	Ongoing	Ongoing		X	X	X	Field to coordinate training and maintenance plans with TecServe rep at point of delivery.
64	Job Start-Up	Review Meeting	Implementation Manager	Schedule Job Start Review meeting	Ongoing	Ongoing		X	X	X	<Here> Client Specific Notes - Developed After Agreement
65	Job Start-Up	Review Meeting	Implementation Manager	Conduct Job Start Review meeting	Ongoing	Ongoing		X	X	X	1 week prior to start date
35	Supplies	Inventory Process	Implementation Manager, Branch/Operations Manager	Establish inventory tracking process	TBD	TBD		X	X	X	Process will include Chemical labeling procedures
39	Supplies	Waste Disposal & Recycling	Branch/Operations Manager	Establish a Waste Disposal & Recycling Plan	TBD	TBD		X	X	X	Review any potential client needs for composting, specific recycling guidelines, co-mingled vs. sorted, etc...
44	Quality Assurance	Client Surveys	Implementation Manager	Schedule frequency of Client Surveys	TBD	TBD		X	X	X	<Here> Client Specific Notes - Developed After Agreement
45	Quality Assurance	Client Inspections	Implementation Manager, Branch/Operations	Set expectation with client for participation in regular management level inspections	TBD	TBD		X	X	X	Establish weekly or bi-weekly frequencies.

SAMPLE Implementation Plan

Item #	CATEGORY	ACTION	RESPONSIBLE	TACTIC	START DATE	Target Complete Date	ACTUAL Complete Date	Landscaping Solutions	Maintenance Solutions	Janitorial Solutions	PROGRESS or COMMENTS
46	Quality Assurance	Client Inspections	Implementation Manager, Branch/Operations Manager	Set expectations for Client self-evaluation inspections	TBD	TBD		X	X	X	Client conducts their own inspections and provides Budd with their findings
47	Quality Assurance	Client Inspections	Branch/Operations Manager	Create site specific checklist for client self-evaluation inspections	TBD	TBD		X	X	X	<Here> Client Specific Notes - Developed After Agreement
48	Quality Assurance	Client Inspections	Implementation Manager,	Present client with their checklist for self-evaluation inspections	TBD	TBD		X	X	X	<Here> Client Specific Notes - Developed After Agreement
49	Quality Assurance	Site Inspections	Branch/Operations	Create a site specific inspection process for site	TBD	TBD		X	X	X	Create a Site Specific Inspection Checklist.
82	Training	Complaint/Request Process	Implementation Manager, Branch/Operations Manager	Schedule Client training for Complaint / Request Process / Request information for SchoolDude/ Asset & Floor Plan Information/Discuss who will be responsible for delegating work orders, tracking completion and quality of	TBD	TBD		X	X	X	<Here> Client Specific Notes - Developed After Agreement
83	Training	Complaint/Request Process	Implementation Manager	Conduct School Dude training/ Request Process - What users will be responsible for entering work orders?	TBD	TBD		X	X	X	<Here> Client Specific Notes - Developed After Agreement
84	Training	Complaint/Request Process	Implementation Manager	Receive Client sign-off on Complaint / Request Process	TBD	TBD		X	X	X	<Here> Client Specific Notes - Developed After Agreement
85	Training	Ordering Process	Implemntation Manager/Account	Request information on parts/supplies process for maintenance/	TBD	TBD			X		<Here> Client Specific Notes - Developed After Agreement
86	Training	PM Process	Implementation Manager/ Account	Request information on current PM schedules,/HVAC/Boilers/Filters/Etc./Fire	TBD	TBD		X	X		
87	Projects	Calendar	Branch/Operations Manager	Develop an overall projects calendar	TBD	TBD		X	X	X	Quarterly CSR's.
88	Alternative Labor Solutions	Requirements	Implementation Manager,	Determine need for Alternative Labor Solutions	TBD	TBD		X	X	X	Only when necessary. Utilize sourcing options to fill employment
89	Alternative Labor Solutions	Procurement	Implementation Manager	Create a written pan for selecting Alternative Labor Solution	TBD	TBD		X	X	X	Verify plan meets with any client specific requirements for selection Selection process MUST include presentation of proof of insurance
90	Alternative Labor Solutions	Procurement	Implementation Manager	Request Bid Proposals for Alternative Labor Solution	TBD	TBD		X	X	X	<Here> Client Specific Notes - Developed After Agreement
91	Alternative Labor Solutions	Procurement	Implementation Manager,	Make the selection of Alternative Labor Solution	TBD	TBD		X	X	X	<Here> Client Specific Notes - Developed After Agreement
92	Alternative Labor Solutions	Procurement	Implementation Manager, Branch/Operations Manager	Incorporate Solution(s) in EE Training	TBD	TBD		X	X	X	<Here> Client Specific Notes - Developed After Agreement
93	KPI's	Establish KPI's	Operations Manager	Establish KPI's which are clearly defined and numerically measurable.	TBD	TBD		X	X	X	<Here>Client Specific Notes - Developed After Agr
94	KPI's	Schedule KPI review Meetings	Operations Manager	Establish meeting frequencies and identify meeting participants.	TBD	TBD		X	X	X	
55	Quality Assurance	Training	Implementation Manager	Verify that all Training sessions have been completed				X	X	X	Obtain signatures from ALL trained EE's as proof of training.
56	Soil Quality	Agronomist Review	Operations Manager	Schedule Agronomist for Soil sampling.				X			The Budd Group utilizes an Agronomist with a PhD for
57	Soil Quality	Agronomist Review	Operations Manager / Agronomist	Conduct soil testing and review of property.				X			<Here> Client Specific Notes - Developed After Agreement
58	Soil Quality	Agronomist Review	Agronomist	Perform sample analysis.				X			<Here> Client Specific Notes - Developed After Agreement
59	Soil Quality	Agronomist Review	Operations Manager	Receive results of testing				X			<Here> Client Specific Notes - Developed After Agreement
60	Soil Quality	Agronomist Review	Operations Manager	Implement plan in accordance with Agronomist recommendations.				X			<Here> Client Specific Notes - Developed After Agreement

The Budd Group's Great People Recognition Program

OVERVIEW

The Budd Group's "Great People Recognition Program" spotlights outstanding employee actions and performances. At this time, we are limiting the employee groups who can be nominated. Once we gain experience with the program it may be expanded to other employee segments.

Program Objectives

- Build on the existing culture of cooperation, performance and excellence
- Reinforce
 - The importance of the five areas of focus: People, Service, Quality, Growth, Finance
 - The Brand Promise: "Great people delivering great experiences to customers and each other"

Eligibility for Nomination

Any employee with a buddgroup.com email address EXCLUDING Sr. Management, General Managers, Regional Managers and Branch Managers.

Employee Recognition and Incentives

- Up to 5 winners will be chosen each quarter.
- The winners' stories will be featured on our Intranet and emailed to all employees.
- Winners will receive an extra day of time off. This will be a floating holiday, cannot be combined with PTO days or replaced with cash and is to be used within 60 days of award.
- They will receive a custom designed "Great People" polo shirt and certificate of recognition.
- In addition to the quarterly rewards and recognition, the winners will be recognized during the Annual Leadership Summit.

Nominating Employees

- When you identify someone that you feel is worthy of recognition as a great employee for a specific action, simply complete the digital nomination form below.
- You may nominate as many employees as you would like each quarter.
- At the conclusion of each quarter, up to five employees will be chosen and recognized as the winners.



The Budd Group's Employee Care Fund

Family owned and operated since 1963, The Budd Group has always prided ourselves on delivering exceptional quality and customer service, while consistently holding true to our Mission Statement.

“The Budd Group strives to be a God-honoring company of excellence, which delivers facility-related services and products that meet our customers’ needs, offers opportunity for development for our employees, provides growing value for our shareholders, and contributes to our community.”

The Budd Group understands that the beauty, efficiency and cleanliness of your facility are only as good as the people who manage it. We realize that hiring high quality employees and providing strong training programs is only part of the battle toward maintaining an excellent work force. We know that it is essential to focus on employee retention and satisfaction. We truly believe that our most valuable asset is our **Great People** and we treat them with the utmost respect.

One of the unique strengths of The Budd Group is our ability to combine industry expertise with the understanding and appreciation of our employees’ needs. As part of our commitment to our employees, we have an Employee Care Program that is built upon our values and beliefs. To respect and protect the rights of our employees is fundamental and we abide by this commitment with conviction. Various tools and processes such as Life Skills Training and Health & Wellness Programs were also established to ensure that this commitment is observed, regardless of where our employees are working.

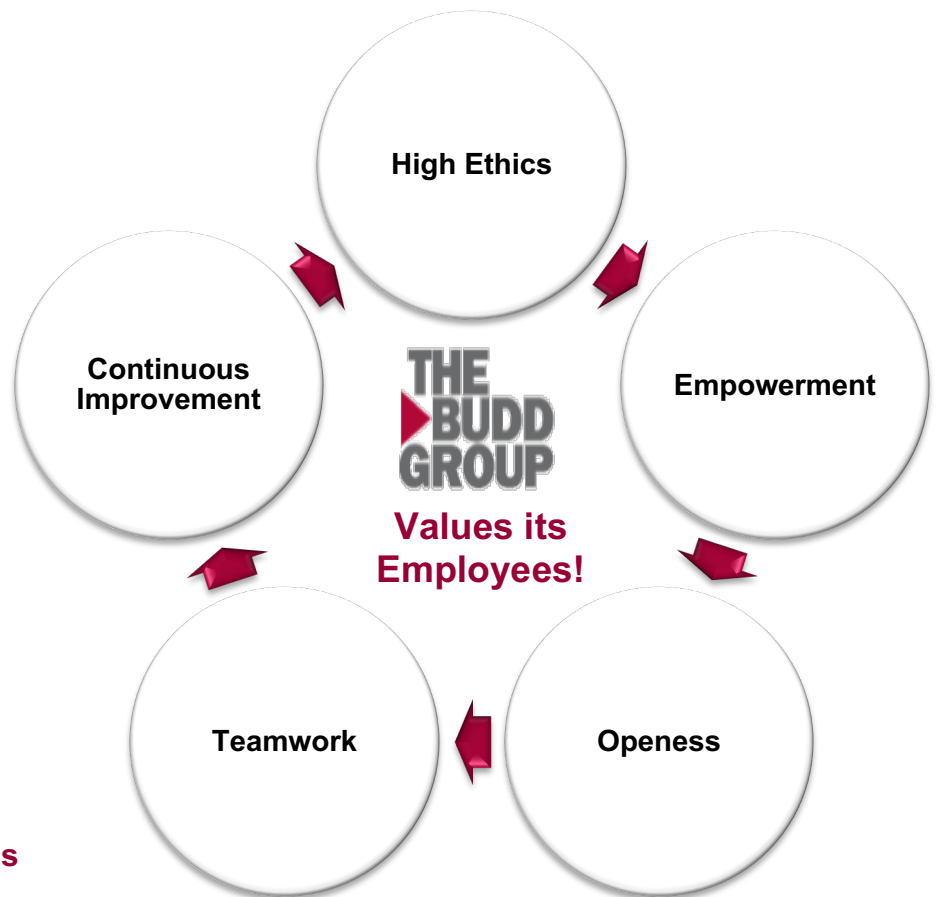
We are a family-run business and that family atmosphere filters down to our workforce. We offer competitive pay rates and benefits plans to all our employees. In addition, we offer employees the opportunity for career advancement and we invest in them with job site education and ongoing training and development.

The Employee Care Program accentuates our focus on our employees. We strive to develop our employees' personal and professional skills, while creating a motivating work environment. Our Human Resources Department works in partnership with our managers and their teams, individual employees, and other vendors to provide programs and processes that encourage employee empowerment and drive results. The Human Resources team strives to provide excellent service to our customers - the employees and leaders of The Budd Group. Like our branch managers, we integrate the values of customer orientation, continuous improvement, and teamwork into all aspects of our human capital management.



The Budd Group values its employees and strives to provide competitive benefits. There are numerous benefits and a variety of health plans available to our employees, including but not limited to:

- Medical insurance
- Choice of health plans
- Dental insurance
- Life insurance
- Disability insurance
- Flexible Spending Account
- 401(k) savings plan
- Tuition reimbursement
- Referral bonus
- Job-related training
- Service awards program
- Paid time off
- Advancement potential



Our Commitment to Our Employees

The Budd Group is committed to building a team of great people by recruiting and hiring the most qualified, service-focused individuals to take care of our customers. The Budd Group values and respects every individual and has created a culture that supports high ethical standards. We are an equal opportunity employer and provide employment based on individual capabilities and qualifications without discrimination due to race, color, religion, sex, age, national origin, disability or veteran status.

The Budd Group is committed to a work environment in which all individuals are treated with respect and dignity. Each individual has the right to work in a professional atmosphere that promotes equal employment opportunities and prohibits discriminatory practices, including harassment.

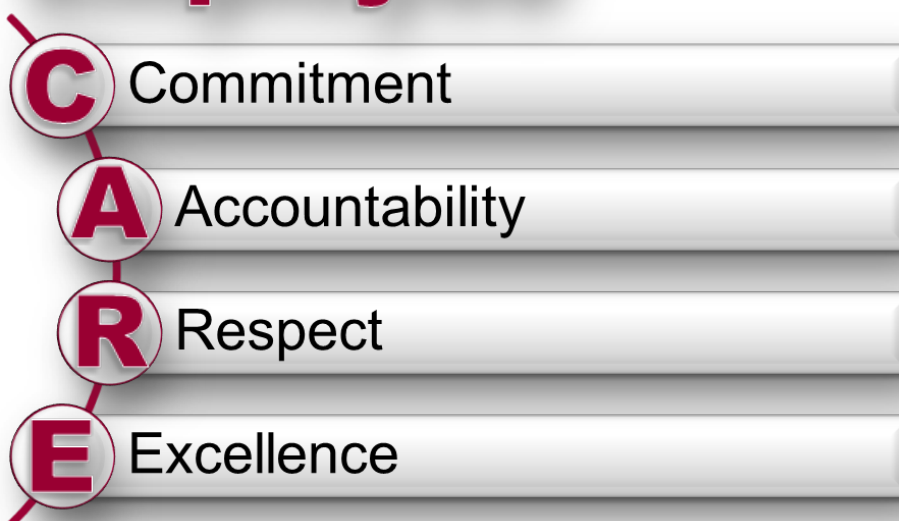
The Budd Group also strives to maintain a healthy, safe and accident-free workplace. Good safety practices and an effective safety program are the key to the overall success of our company. To foster this culture, we have a commitment to safety from top management to all employees. We strongly encourage our employees to communicate all safety issues with their managers, supervisors and fellow employees.



“When great people work together, great things happen.” ~ Joe Budd, CEO

Our greatest source of pride at The Budd Group is the employees that share their time and talent every day. When one of our employees is in need of assistance, we want to provide help in any way that we can. Through our Employee Assistance Fund, we bring that spirit of giving closer to home. The Budd Group Employee Assistance Fund was created to help employees who are facing financial hardship because of a qualified incident. This program is just another way that we show our employees we care.

Employee



A look into our employees...

Priscilla Price

Lead Supervisor – Novo Nordisk

Priscilla has been with The Budd Group for over three years. She works as a Lead Supervisor at Novo Nordisk, a global healthcare company with 90 years of innovation and leadership in diabetes care. Priscilla previously worked for a competitor of The Budd Group and says she now understands what it means to work for an employer who cares for its employees. One of the many things Priscilla likes about working for The Budd Group is the people and management.

“They treat us like family, and no matter how big or small our concerns are, they truly care for us.”

“Everyone is family-oriented and you never feel like you are on your own.”

“They really care for us, which makes me want to work hard for them and always to a great job for our customers.”

“It’s important to enjoy your work and I like working for The Budd Group.”

“There is a big difference in working for The Budd Group and other companies. The Budd Group cares about its employees.”



Robert Thompson

Detail Coordinator – SouthPark Mall

Robert has been with The Budd Group for over six years and he has worked at SouthPark Mall for over 20 years. Throughout his tenure at SouthPark Mall, Robert has worked for many Budd Group competitors, and he says The Budd Group provides him a job that he “looks forward to going to each day.”

“My job provides me many opportunities for success and I work for and with many good people.”

“I always feel like my managers and I are on the same page. They are fair and they are always taking the time to teach me new things.”



Henry Stevenson
Contract Manager – Chester County School District

Henry has been with The Budd Group for five years and manages our janitorial contract with Chester County School District. He truly enjoys working with The Budd Group and says that The Budd Group sets itself apart from its competitors in many ways.

“The Budd Group is a God-honoring company and a great team to work with. Our support staff and everyone else I work with are outstanding.”

“I enjoy working for The Budd Group, and I’m grateful for the management team for taking me under their wings and teaching me the business.”

“We have Great Employees working on our TEAM (really dedicated) who take pride in what they do!”



Kim Real
Lead Housekeeper – SouthPark Mall

Kim has been a part of The Budd Group team for six years. She is one of the lead housekeepers that keeps SouthPark Mall looking its best! When asked what she likes about working for The Budd Group, Kim says that she loves the job security that The Budd Group offers.

“I love the fact that The Budd Group supplies everything needed to get the job done.”

“I would like to thank The Budd Group for their choice in account managers. They care about each employee, are very hands on and have compassion.”

“All account managers with The Budd Group are the best people to work under, which makes a happy work place for all employees.”

“I came to The Budd Group while living in a homeless shelter and needed a job really bad. They gave me a job and helped me find my own place to live.”



Sample Quarterly Business Review Agenda

SAMPLE- The Budd Group & Client Quarterly Review Agenda

1. Team Status/Turnover/Accomplishments & Opportunity Highlights
2. Training/Safety Training Update
3. Work Orders/Clean Telligent
4. Special Projects (Seasonal to include Summer Flips, Camps, Commencement, etc.)
5. Consumables
6. Additional Invoice Items
7. Updates on managed contractor services- Pest Control, Window Cleaning, SWAM Partnership
8. Opportunities
9. Questions / Comments

