

Request for Proposal 22-68795
General Building Preventative Maintenance & Repairs
ATTACHMENT E BUSINESS PROPOSAL

Instructions: Please provide answers in the shaded areas to all questions. Reference all attachments in the shaded area.

Business Proposal

2.3.1 General - Please introduce or summarize any information the Respondent deems relevant or important to the State's successful acquisition of the products and/or services requested in this RFP.

The Primary Purpose of a Preventative Maintenance Program is to Reduced Costs as seen in the following ways:

- Better conservation of assets and increased life expectancy of assets, thereby eliminating premature replacement of machinery and equipment.
- Reduced overtime costs and more economical use of maintenance personnel due to working on a scheduled basis instead of a crash basis to repair breakdowns.
- Timely, routine repairs circumvent fewer large-scale repairs.
- Reduced cost of repairs by reducing secondary failures. When parts fail in service, they usually damage other parts.
- Identification of equipment with excessive maintenance costs, indicating the need for corrective maintenance, operator training, or replacement of obsolete equipment.
- Improved safety and quality conditions.

The Rule of Preventative Maintenance programs is that the higher the value of facility assets and equipment per square foot of facility, the greater will be the return on a PM program

The Key to a Successful Preventive Maintenance Program is scheduling and execution. Scheduling should be automated to the maximum extent possible. Priority should be given to preventive maintenance and a very aggressive program to monitor the schedule and ensure that the work is completed according to schedule.

The successful acquisition of the services offered through this RFP guarantee the State's continuation of service and performance of a highly developed Preventative Maintenance Program.

2.3.2 Respondent's Company Structure - Please include in this section the legal form of the Respondent's business organization, the state in which formed (accompanied by a certificate of authority), the types of business ventures in which the organization is involved, and a chart of the organization. If the organization includes more than one (1) product division, the division responsible for the

development and marketing of the requested products and/or services in the United States must be described in more detail than other components of the organization. Please enter your response below and indicate if any attachments are included.

Edwards Electrical and Mechanical is an S-Corporation and began the year 1968 in Indiana. The Company pursues business in Service and Construction of Plumbing, Electrical, HVAC/R, Building Management Systems, Automation Controls, Metal Manufacturing, Glycol Proportioning, Fleet Care and Energy Management Systems. See Attachment E1, Organizational Chart
See Attachment E2, E3 & E4 Company Certifications

2.3.3 Respondent's Diversity, Equity and Inclusion Information - With the Cabinet appointment of a Chief Equity, Inclusion and Opportunity Officer, on February 1, 2021, the State of Indiana sought to highlight the importance of this issue to the state. Please share leadership plans or efforts to measure and prioritize diversity, equity, and inclusion. Also, what is the demographic compositions of Respondents' Executive Staff and Board Members, if applicable.

Edwards Electrical & Mechanical Corporate Officers are Paul G. Morey-President, Sherry Dean-CFO, Theodore Stichler-VP and Nancy Schrader-Secretary. We are proud to have two (2) very capable women on the Executive Team.
See Attachment E17 - Employee Handbook addressing work place standards "Respect Works Here".

2.3.4 Company Financial Information - This section must include documents to demonstrate the Respondent's financial stability. Examples of acceptable documents include most recent Dunn & Bradstreet Business Report (preferred) or audited financial statements for the two (2) most recently completed fiscal years. If neither of these can be provided, explain why, and include an income statement and balance sheet, for each of the two most recently completed fiscal years.

If the documents being provided by the Respondent are those of a parent or holding company, additional information should be provided for the entity/organization directly responding to this RFP. That additional information **should explain the business relationship between the entities and demonstrate the financial stability of the entity/organization which is directly responding to this RFP.**

Audited Financials can be found on Attachment J.
See Attachment E8, Letter from Bonding Company
For additional information, you can contact Paul G. Morey, President at (317) 491-2930.

2.3.5 Integrity of Company Structure and Financial Reporting - This section must include a statement indicating that the CEO and/or CFO, of the responding entity/organization, has taken personal responsibility for the thoroughness and correctness of any/all financial information supplied with this proposal. The areas of interest to the State in considering corporate responsibility include the following items: separation of audit functions from corporate boards and board members, if any, the manner in which the organization assures board integrity, and the separation of audit functions and consulting services. The State will consider the information offered in this section to determine the responsibility of the Respondent under IC 5-22-16-1(d).

Paul G. Morey acting in the office of President and CEO certifies and takes full and unquestioned personal responsibility for the thoroughness and completeness of all financial information as requested within the RFP documentation.

Our approach to financial reporting reflects three core principles:

- that our financial reports present a true and fair view;
- that our accounting methods are comprehensive and relevant and comply with applicable accounting rules and policies; and
- that our external auditor is independent and serves security holder interests.

The company officers monitor developments relevant to these principles and review our practices accordingly.

The Audit Accountant oversees the preparation of our financial statements. The Audit Accountant requires management to confirm that the accounting methods applied by management are consistent and comply with applicable accounting standards and concepts.

The Audit Accountant reviews and assesses:

- any significant estimates and judgments in financial reports and monitors the methods used to account for unusual transactions;
- the processes used to monitor and comply with laws, regulations and other requirements relating to external reporting of financial and non financial information; and
- the major financial risk exposures and the process surrounding the disclosures made by the CEO and COO in connection with their personal certifications of the half year and annual financial statements.

The Audit Accountant conducts regular discussions with:

- company officers and the external auditor about our major financial risk exposures and the steps management has taken to monitor and control such exposures;
- the external auditor concerning their audit and any significant findings and the adequacy of management's responses;

- management and the external auditor concerning the half-yearly and annual financial statements, including disclosures in the ‘operating and financial review and prospects’ section of the Annual Report;

management and the external auditor regarding any correspondence with regulators or government agencies and reports which raise issues of a material nature.

2.3.6 Contract Terms/Clauses - Please provide the requested information in RFP Section 2.3.6. Additional rows may be added if necessary.

Contract Term Identifier and Header	Suggested Language Change	Rationale for suggested change
Edwards Electrical and Mechanical does not require any additional contract terms and accepts the mandatory contract terms as indicated herein and within the body of the Transmittal Letter.		

2.3.7 References - Reference information is captured on **Attachment H** Respondent should complete the reference information portion of the **Attachment H** which includes the name, address, and telephone number of the client facility and the name, title, and phone/fax numbers of a person who may be contacted for further information if the State elects to do so. The rest of **Attachment H** should be completed by the reference and **emailed DIRECTLY** to the State. The State should receive three (3) **Attachment Hs** from clients for whom the Respondent has provided products and/or services that are the same or similar to those products and/or services requested in this RFP. **Attachment H** should be submitted to idoareferences@idoa.in.gov. **Attachment H** should be submitted no more than five (5) business days after the proposal submission due date listed in Section 1.24 of the RFP. Please provide the customer information for each reference.

Customer 1	
Legal Name of Company or Governmental Entity	LaRue E. Carter Hospital
Company Mailing Address	2601 Cold Spring Road
Company City, State, Zip	Indianapolis, IN 46222
Company Website Address	www.ingov/fssa/dmha/6801.thm
Contact Person	Carl Knapp (Dan)
Contact Title	Facility Manager

Company Telephone Number	(317) 941-4090
Company Fax Number	(317) 941-4093
Contact E-mail	Carl.Knapp@fssa.IN.gov
Industry of Company	LaRue D. Carter Hospital was a psychiatric facility that opened in 1952. In 2019, the new Neuro-Diagnostic Institute on East 16 th Street opened next to COMMUNITY HOSPITAL East and replaced Larue Carter Hospital's services. Patient transfers to the new facility were complete on March 20, 2019.
Customer 2	
Legal Name of Company or Governmental Entity	Labcorp
Company Mailing Address	679 E. County Line Road
Company City, State, Zip	Greenwood, IN 46143
Company Website Address	www.labcorp.com
Contact Person	Gareth Coote or Thomas Cornelius
Contact Title	Operations & Maintenance Leader
Company Telephone Number	(317) 807-1258
Company Fax Number	
Contact E-mail	Gareth.coote@corteva.com/thomas.cornelius@corteva.com
Industry of Company	Labcorp does advanced diagnostic testing, to helping launch new drugs, to offering new perspectives through data, all drawing from a deep well of scientific expertise.
Customer 3	
Legal Name of Company or Governmental Entity	The Orchard School
Company Mailing Address	615 W. 64 th Street
Company City, State, Zip	Indianapolis, IN 46260
Company Website Address	www.orchard.org
Contact Person	Courtney Williams
Contact Title	CFO
Company Telephone Number	(317) 251-9253
Company Fax Number	(317) 254-8454
Contact E-mail	cwilliams@orchard.org
Industry of Company	This is the 98th year of The Orchard School. Orchard provides a Progressive education with a focus on experiential hands-on learning.

2.3.8 Registration to do Business – Per RFP 2.3.8, Respondents providing the products and/or services required by this RFP must be registered to do business by the Indiana Secretary of State. The Secretary of State contact information may be found in Section 1.18 of the RFP. This process must be concluded prior to contract negotiations with the State. It is the successful Respondent's responsibility to complete the required registration with the Secretary of State. Please indicate the status of registration, if applicable. Please clearly state if you are registered and if not provide an explanation.

Yes, we are registered with the Indiana Department of Administration, Procurement Division. See Attachment E6 - Company Certifications

2.3.9 Authorizing Document - Respondent personnel signing the Executive Summary of the proposal must be legally authorized by the organization to commit the organization contractually. This section shall contain proof of such authority. A copy of corporate bylaws or a corporate resolution adopted by the board of directors indicating this authority will fulfill this requirement. Please enter your response below and indicate if any attachments are included.

Paul G, Morey acting as the President is herein authorized as an executive officer of the company to enter into this agreement as agreed upon with the State of Indiana. See Attachment E7 – Corporate By-Laws

2.3.10 Diversity Subcontractor Agreements -

- a. Per RFP Section 1.21, Minority & Women's Business Enterprises (MBE/WBE), and 1.22 Indiana Veteran Owned Small Business Subcontractor (IVOSB), explain process followed to engage with potential MBE, WBE and IVOSB owned, Indiana certified businesses listed on Division of Supplier Diversity site. List the businesses invited to discuss the opportunity for potential partnership.

MWBE Sub Contractors and Suppliers:

- Worldwide Filters (MBE pursuant to IC 4-13-16.5-1)
3318 Pagosa Court, Indianapolis Indiana 46226

Formed in Indiana

Provides replacement air filters and Strion filtration DFEs at an annual estimated cost of \$56,700

See Attachment E11, Contractor Letter

- Service Pipe and Supply Co. (WBE pursuant to IC 4-13-16.5-1)
302 South New Jersey Street Indianapolis, Indiana 46204

Formed in Indiana

Provides sourcing of piping and plumbing materials at an estimated cost of \$37,000 per annual contract year.

See Attachment E12, Contractor Letter

- First Electric Supply
1550 South Franklin Road, Indianapolis, Indiana 46239

Formed in Indiana

Provides Electrical systems, lighting, components, and accessories and supplies \$22,000 per annual contract year.

See Attachment E13, MBE Certification

Non-MWBE Sub Contractors and Suppliers:

- Condon Fire & Safety
5324 English Avenue, Indianapolis, Indiana 46219

Formed in Indiana

Provides Cooking Hood Fire System and Slave Inspections at an agreed upon amount of \$3,788.18

See Attachment E14, Contractor Quote

- Horner Electric
1521 East Washington St. Indianapolis, Indiana 46201

Formed in Indiana

Provides vibration analysis on all contracted motors exceeding 30 HP at an annual cost of \$9,759.36

See Attachment E15, Contractor Quote

- Fuller Engineering
4135 West 99th Street, Carmel, Indiana 46032

Preventative Maintenance for Fire Protection Equipment at an agreed upon amount of \$4,120.

See Attachment E8, Contractor Quote

- Hoodz of Central & Northeast Indiana
7750 Zionsville Road, Suite 350, Indianapolis, Indiana 46268

Provides cleaning on kitchen equipment at an agreed upon amount of \$1,250.

See Attachment E9, Contractor Quote

- R. E. Griesemer, Inc.
51 West Raymond Street, Indianapolis, Indiana 46225

Provides fire pump tests at an agreed upon amount of \$1,900.

See Attachment E10, Contractor Quote

- b.** If not proposing each MBE, WBE or IVOSB subcontractor partnership, explain the rationale for declining to do so. Complete this for each category not proposed.

N/A

2.3.11 Evidence of Financial Responsibility This section will indicate the ability to provide the mandatory evidence of financial responsibility. See Section 1.25 of RFP for details.

Bonding, if required, will be provided when Awarded per 1.25.
See Attachment E5- Bond Letter

2.3.12 General Information - Each Respondent must enter your company's general information including contact information.

Business Information	
Legal Name of Company	Edwards Electrical & Mechanical, Inc.
Contact Name	Paul G. Morey
Contact Title	President / CEO
Contact E-mail Address	moreyp@edwards-elec.com
Company Mailing Address	2350 N. Shadeland Avenue
Company City, State, Zip	Indianapolis, IN 46219
Company Telephone Number	(317) 543-3460 or DID (317) 354-2616
Company Fax Number	(317) 543-3476
Company Website Address	www.edwards-elec.com
Federal Tax Identification Number (FTIN)	35-1142330
Number of Employees (company)	384
Years of Experience	50
Number of U.S. Offices	2
Year Indiana Office Established (if applicable)	1968
Parent Company (if applicable)	MEP Holding Company, Inc.
Revenues (\$MM, previous year)	\$75,709,143
Revenues (\$MM, 2 years prior)	\$68,185,726
% Of Revenue from Indiana customers	90%

- a. Does your Company have a formal disaster recovery plan? Please provide a yes/no response. If no, please provide an explanation of any alternative solution your company has to offer. If yes, please note and include as an attachment.

Yes, See Attachment E16 – Business Continuity Plan

- b. What is your company's technology and process for securing any State information that is maintained within your company?

For physical transportation of messages and documents, it is mandatory of all employees in proper possession of sensitive or confidential material to ensure the secure handling during transport. Documents are required to be received only in person by the intended recipient.

For Intra-organizational communication all channels used to transmit email and documents are automatically encrypted by default. Transport Layer Security (TLS) encryption is used for server to server traffic and Secure Socket Technology (SSL) is used for client access traffic through Outlook and Exchange ActiveSync.

For Inter-organizational communication (mail and documents sent outside the organization) the Exchange server automatically establishes a secure connection with

SMTP hosts that support TLS encryption. Exchange also supports mutual TLS authentication wherein each server verifies the identity of the other server by validating a certificate provided by the other server. Messages that have successfully traveled over the secured path from an authenticated sender are displayed to user as a Domain Secured in Outlook and Outlook mobile access.

A multi-layered anti-spam filter and malware/antivirus filter provides continuous monitoring of exchanged messages and documents traversing the secured path.

For data security within the organization, a layered 128bit encryption user login prevents unauthorized data access on document drives and project management servers.

2.3.13 Experience Serving State Governments - Please provide a brief description of your company's experience in serving state governments and/or quasi-governmental accounts.

Edwards Electrical and Mechanical has served the State of Indiana in the field of Facility Management for fourteen years while maintaining the day in and day out operations of the Indiana Government Center complex as well as the critical systems vital to its mission capabilities. We've performed several contracts for DNR, INDOT, and DOC facilities in equipment service, maintenance, and replacement through both our service department as well as our construction department.

2.3.14 Experience Serving Similar Clients - Please describe your company's experience in serving customers of a similar size to the State with similar scope. Please provide specific clients and detailed examples.

Edwards Electrical & Mechanical has maintained a working staff up to twenty-five facility maintenance employees at the LabCorp (Dow Agrosiences/Corteva/Dupont) facility at 9330 Zionsville Road in Indianapolis since 2008 while performing HVAC, Plumbing, and small construction builds since 2002.

2.3.15 Payment

Not Applicable

2.3.16 Extending Pricing to Other Governmental Bodies

Not Applicable