

**ADDENDUM NO. 1**

**DATE: November 16, 2023**

**PROJECT: Preventative Maintenance and Required Repairs for Elevators and Escalators  
in the Indiana Convention Center**

**OWNER: Capital Improvement Board of Managers of Marion County, Indiana  
100 South Capitol Avenue  
Indianapolis, IN 46225**

This Addendum is issued in accordance with the Proposal Documents and becomes a part of the Contract Documents as provided therein and in the General Conditions of the Contract for Construction, Article 1 – Contract Documents.

The information contained herein modifies the original Proposal Documents dated October 12, 2023. Requirements of the original Proposal Documents remain in effect, except as modified by this Addendum. Acknowledge receipt of this Addendum in the space provided on the Proposal Form. Failure to do so may subject the Offeror to disqualification.

**PART 1 – PRE-PROPOSAL MEETING/WALKTHROUGH DOCUMENTS**

Pre-Proposal Agenda from project walkthrough on October 30, 2023 at 10:00 am (Enclosed, Updated)  
Pre-Proposal Sign-in Sheet from project walkthrough held on October 30, 2023 at 10:00 am (Enclosed)

**PART 2 – QUESTIONS AND ANSWERS**

# Mandatory Pre-Proposal Meeting Agenda

Subject	Mandatory Pre-Proposal Meeting
Date	Monday October 30, 2023
Time	10:00 AM
Location	ICC Board Room
Project Name	Preventative Maintenance and Required Repairs for Elevators and Escalators in the Indiana Convention Center

## A. Team Introductions

1. Owner: Capital Improvement Board of Managers of Marion County  
Tom Boyle, Director of Operations  
Stormy Six-Poe, Sr. Facility Manager  
Bobbie Green, Contract Manager  
Katelyn Sale, Projects Administrator
2. Consultant: Stuard and Associates, INC.  
Tony Stuard, President

## B. Sign-In Sheet

## C. Proposal Process Timeline

1. Deadline for Submittal of Questions and/or Substitution Requests to CIB:  
~~Wednesday November 1, 2023 at 5:00 PM~~ **November 10, 2023 at 3:00 PM**
2. Deadline for CIB to provide responses to Questions and/or Substitution Requests:  
~~Tuesday November 7, 2023 at 5:00 PM~~ **November 16, 2023 at 3:00 PM**
3. Deadline of submittal of Proposals to CIB:  
~~Monday November 13, 2023 at 10:00 AM~~ **November 21, 2023 at 10:00 AM**
4. Date of Interviews (if CIB elects to conduct):  
~~Wednesday November 15, 2023~~ **November 28, 2023**
5. Award of Contract: **Friday December 8, 2023**
6. Service Agreement to take Effect: **Monday January 1, 2024**

## D. Please send all questions or substitution requests to all of the following:

Tom Boyle – [tom.boyle@icclos.com](mailto:tom.boyle@icclos.com)  
Katelyn Sale – [katelyn.sale@icclos.com](mailto:katelyn.sale@icclos.com)  
Tony Stuard – [tony@elevatorinspection.com](mailto:tony@elevatorinspection.com)

## E. Service Contract Requirements

Each Vendor's standard Full Maintenance Contractual Agreement should be tailored to incorporate the provisions required by the CIB as referenced in Section 00500 of the RFP Documents. Part of the proposal evaluation encompasses compliance with this requirement.

#### **F. XBE Participation**

1. It is a goal of the CIB to promote the utilization of Minority Owned Business Enterprises (MBE), Women Owned Business Enterprises (WBE), Veteran Owned Business Enterprises (VBE), and Disabled Owned Business Enterprises (DOBE). Collectively, these are referred to as XBE.
2. Proposal submissions should include the extent to which XBE participation will be utilized as part of the procurement if awarded, and how the XBE entities are utilized as part of the Offeror's business operations.

#### **G. Note the following requirements as laid out in pages 8-10 of the RFP:**

1. Employee Training Program – See page 8 – number 24.
2. Vendor Qualifications – Vendor shall agree and represent to the CIB that Vendor is qualified under IC 4-13.6-4.
3. Payroll Records – See page 9 – number 6.
4. Employment Laws – See page 9 – number 27.

#### **H. Statement of Qualifications and Pre-Qualification Requirements**

The proposal submittal shall include a Statement of Qualifications that is no more than five pages long. It needs to outline the Offeror's background, qualifications, and experience – including confirmation that the Offeror meets the following Pre-Qualification Requirements:

1. Having a full service department in Indianapolis, IN that has been established and operational for at least 5 years;
2. Having entered into at least two service agreements covering 12 or more units (both elevators and escalators) in high volume settings in the last 5 years.

#### **I. A Procurement Plan consisting of the following is also required:**

1. Organization and Personnel – an organizational chart identifying key personnel and the responsibilities they will assume if awarded the Service Contract.
2. Schedule – a comprehensive schedule listing and describing the inspection, preventative maintenance and any other routine tasks to be performed along with frequency and duration. Persons and entities involved in this should be noted as well, consistent with the RFP Documents.
3. Warranty – a detailed description of the warranty will be provided for all new materials, equipment and supplies installed during the Contract Term.

#### **J. Evaluation Criteria**

Each proposal will be evaluated based on a set of Evaluation Criteria that will be used collectively to reach a determination. Please note that the CIB considers each point of Evaluation Criteria to be equally important. Pricing will be considered in this evaluation but it will not be used alone to determine who is selected. The Evaluation Criteria are as follows:

1. Prices
2. Qualifications, Experience, and Expertise
3. Procurement Plan and Schedule

4. Compliance with RFP Documents
5. Local Support
6. Insurance
7. Financial Stability
8. Value
9. Form of Proposed Supply Contract

**K. Questions**


**L. Site Walk**

# MANDATORY PRE-PROPOSAL MEETING: SIGN-IN SHEET

CAPITAL IMPROVEMENT BOARD OF MANAGERS OF MARION COUNTY

Monday October 30, 2023

Preventative Maintenance & Required Repairs - ICC Elevators and Escalators

ATTENDEE	COMPANY NAME	PHONE NUMBER	EMAIL ADDRESS	XBE
Nick Zoellner	TK Elevator	317-735-5768	nick.zoellner@tklevator.com	
NICK EHLERDING	ORACLE ELEVATOR	317-464-0855	NICK.EHLERDING@EFSTEAM.COM	
Cory Ernst	Oracle Elevator	308-641-8083	cory.ernst@efsteam.com	
Tom Steward	Steward	765-346-3748	Tom@stewardinspection.com	
NATE NEAL	Kone Inc.	(317) 281-3753	SHELLEY.HENRICKS@KONE.COM NATE.NEAL@KONE.COM	
Megan Torbenson	Otis Elevator	317-306-1265	meganm.torbenson@otis.com	
Brady White	OTIS	219-819-2211	brady.white@otis.com	
georgia presley	OTIS	224-254-9450	georgia.presley@otis.com	
Katelyn Sale	CIB	317- <del>262</del> 262-3439	Katelyn.Sale@icclos.com	
Tom Boyle 	CIB		tom.boyle@icclos.com	
Stacy Six-Poe	CIB	317-262-3420	Stacy.Six-Poe@icclos.com	
Bobbie Green	CIB	317-262-3489	Bobbie.Green@icclos.com	
PAUL HADLEY	TKE	317-263-4902	paul.hadley@tklevator.com	
ZACK Bontrager	American Elevator	317-741-3195	ZackBon87@gmail.com	

Q1: Page 10 Section 29: Can our electronic copy of the RFP Response be submitted by email?

A1: No, electronic copies are required to be via a thumb drive, CD-ROM, or other compatible memory device.

Q2: Is there an electronic copy of the schedule of events?

A2: Yes, there is one attached to the RFP Documents.

Q3: Can we only do tests when there is not an event in that section of the facility, or are tests only allowed during the time that no events are taking place?

A3: Yes, if no events are in a portion of the building, and scheduled in advance with Facilities, testing will be allowed.

Q4: Section 00500 – Under Vendors Obligations: This section talks about “performing work on second or third shift, on an overtime basis and/or supplementing its crew size, all without increase to the contract sum.” Another section in the Maintenance RFP says, “When a service request is made outside regular working hours, overtime rates shall apply. Owner shall only be responsible for the bonus portion of overtime hours.”

Q4A: Can you clarify if overtime work is to be billable or included under the contract.

A4A: Overtime can be billed for the bonus portion only.

Q4B: Can you provide any insight into the current percentage of work that takes place after hours that is included under your current maintenance contract sum?

A4B: Approximately 20% of work would be required on overtime.

Q5: Scope level - Is the replacement of step chains covered in the maintenance contract price? Is the replacement of telescopic packings covered in the maintenance contract price? Does the section below mean that every handrail should be replaced every year without additional cost to the contract price?

A5: The Elevator Contractor will be responsible for the replacement of damaged handrails and comb plates. They do not need to be replaced on an annual basis if not damaged. The step chains and telescopic packings are included in the maintenance contract price.

through proper lubrication and preventive maintenance (PM) and repair services on a scheduled and as needed basis at. The Contractor shall be responsible for the repair/replacement of escalator combs and handrails. The Contractor shall provide a preventative replacement plan for the handrails on a minimum of an annual basis. The program will include schedules that will minimize the disruption of service in the day-to-day routine of the facility.

3. Repair” includes repairs caused by acts of vandalism and misuse. Damage caused by others will only be considered payable by the Owner if there is clear evidence, such as foreign objects, obvious vandalism, witnesses to damage, or other items that indicate the damage was caused by other than normal wear and tear.

Q6: Are the dates in the RFP or the Agenda Correct?

A6: The dates in the RFP Documents are accurate. The Agenda has been updated with those dates and enclosed in this addendum.

**END OF ADDENDUM 1**