

TECHNICAL PROPOSAL

For Facilities Maintenance Management Services

Developed for:

BEAUFORT COUNTY SCHOOL DISTRICT

ORIGINAL

RFP/Solicitation #: 25-024

Submittal Address:
Beaufort County School District
Kaylee Yinger
Director of Procurement and Business Systems
2900 Mink Point Blvd.
Beaufort, SC 29902
kaylee.yinger@beaufort.k12.sc.us

Due Date: May 14, 2025
Due Time: 4:00 p.m.

Submitted By:

[redacted]

THE BUDD GROUP
Great People ▸ Smart Service

May 14, 2025

Ms. Kaylee Yinger, NIGP, CPP, CPPB
Procurement Officer
Beaufort County School District
2900 Mink Point Boulevard
Beaufort, SC 29902

RFP # 25-024 Facilities Maintenance Management Services

Dear Ms. Yinger,

We are pleased to provide our proposal for Facilities Maintenance Management Services. Our ***understanding*** of the Beaufort County School District's operational needs, gained through our continued observance of board and facilities committee meetings, ongoing listening, and diligent attention to your priorities, allows us to offer tailored and impactful solutions. Our valued partnership in custodial services over the past year has deepened this insight, ensuring ***we are well-positioned*** to enhance your educational environment.

Imagine a maintenance program for Beaufort County Schools that's not reactive, but ***proactive, fully staffed, and running with clockwork efficiency***. That's The Budd Group's promise. Our certified experts, backed by strong local management support and recruitment, will drive your HVAC PM completion rates to 100% and boost staffing to 98% and beyond – results ***we consistently deliver for over 12 million square feet of educational space***. We'll also bring order to your maintenance operations, from the warehouse to your work orders. The bottom line? Expect better-maintained schools and a smoother, safer learning environment, powered by a partner already part of your community and committed to your success.

BEAUFORT COUNTY SCHOOL DISTRICT

THE BUDD GROUP
Great People ▸ Smart Service

Needs....

- **Responsive** and **effective** onsite team
- Higher and more consistent **staffing levels**
- Enhanced **preventative maintenance capabilities** within the HVAC program
- Greater **support** for the onsite team
- A **reliable** maintenance service partner

Outcomes...

- Work orders are **responded** to within 2 days and **completed** within 5 days
- Increased **staffing rate** for skilled staff from 87.5% to 98%
- A **completion rate of 100%** of preventative maintenance work orders for HVAC
- Enhanced **workforce capabilities** via training and consistent upkeep of skills
- A **consistent partnership** across service lines



The following Executive Summary outlines our solutions for achieving the desired outcomes. We believe that the Beaufort County School District will recognize the thoughtful and customized nature of our maintenance program. Our commitment is rooted in our deep experience, proven expertise, and a genuine passion for serving your needs. ***We apply this comprehensive approach, entirely focused on your success!***

We look forward to hearing from the Beaufort County School District Team soon!

Sincerely,

[redacted]



THE BUDD GROUP
Great People ▸ Smart Service

Table of Contents

Technical Proposal Title Page 1

Cover Letter 2

Section 1: Signed Cover Page and Page Two

RFP Cover Page and Page Two 8

Section 2: Executive Summary

Executive Summary 10

Section 3: Facilities Maintenance Experience

Facilities Maintenance Experience 13

Section 4: Bidder Experience and Capabilities

Capabilities and References 14

Section 5: Bidder Project Manager and Project Personnel

Project Personnel 16

Maintenance Director Job Description 24

Assistant Maintenance Director Job Description 26

Area Maintenance Manager Job Description 28

Zone Lead Job Description 30

Grounds Manager 32

PM Manager Job Description 34

HVAC Manager Job Description 36

HVAC Supervisor Job Description 38

Section 6: Proposed Facilities Maintenance Staff

Staffing Plan 40

Employee Recruitment, Selection and On-boarding Procedures 47

Dayforce Human Capital Management Software 51

Uniform Program 52

General Maintenance Job Description 54

Locksmith Job Description 56

Generator Technician Job Description 58

Low Voltage Job Description 60

Painter Job Description 62

Plumber Job Description 64

Section 7: Transition Plan

BCSD Maintenance Implementation Plan 66

Warehouse Management Process 74

Employee Retention and Benefits 76

Employee Retention Programs 78

Employee Care 81

Dayforce Wallet On-demand Pay 82

Section 8: Training Program for Management and Hourly Employees

Training Program 83

Interplay Learning Facility Maintenance Training Solution 88

Interplay Learning Training Manual Course Catalog Sample 90

Section 9: Facilities Maintenance Services Quality Control

Quality Control 98

Section 10: Facilities Maintenance Services Management System

Brightly Computerized Maintenance Management System 108

Section 11: Key Control Policy

Key Control Procedures 111

Section 12: Financial Stability

2024 Audited Financials 112

2023 Audited Financials 127

2022 Audited Financials 143

Section 13: Objections, Exceptions, and Observations

Exceptions 161

Section 14: Qualifications - Required Information

Qualifications - Required Information 162

Certificate of Insurance 172

Safety Certifications 173

Subcontractor Management 184

Section 15: Operational Details

Inventory Management 186

Help Desk 189

Emergency Response 192

Building Information Card 194

Event Management 201

Section 16: Required Forms and Information

Statement of Intent 205

Business Enterprise Utilization Report 206

Student Employment Program 207

Section 17: Appendix

Safety 213

Diversity, Equity, and Inclusion 214

Supplier Diversity 215

Beaufort County School District

Solicitation Number:	25-024
Date Printed:	March 10, 2025
Date Issued:	April 8, 2025
Procurement Officer:	Kaylee Yinger, CPPB, NIGP
Phone:	843-322-2349
Email:	Kaylee.Yinger@beaufort.k12.sc.us

Request for Proposals (RFP)

DESCRIPTION: **Facilities Maintenance Management Services**
SUBMIT OFFER BY (Opening Date & Time): **May 9, 2025 @ 4:00 PM EST**
QUESTIONS MUST BE RECEIVED BY: **April 29, 2025 @ 4:00 PM EST**
NUMBER OF COPIES TO BE SUBMITTED: **Six (6) Original Signed Copies**
Two (2) USB - One (1) Redacted

Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior.

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

PHYSICAL ADDRESS:
Beaufort County School District
Procurement Office
2900 Mink Point Blvd
Beaufort, SC 29902

Electronic Bid Submissions will be accepted through the following we address: Here

CONFERENCE TYPE: **Mandatory Pre-Proposal Conference / Site Visits**
LOCATION: **District Office 2900 Mink Point Blvd Beaufort, SC 29902**
DATE & TIME: April 29, 2025 @ 9:30 AM
AWARDS & AMENDMENTS:

Award will be posted at the Physical Address stated above on or after May 10, 2025. The award, this solicitation, and any amendments will be posted at the following web address: http://beaufortschools.net.

You must submit a signed copy of this form with Your Offer. By submitting a proposal or bid, you agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of 90 calendar days after the Opening Date.

NAME OF OFFEROR: (Full legal name of business submitting the offer) ENTITY TYPE: (S) Corporation

[redacted]

PRINTED NAME TITLE

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror above. An offer may be submitted by only one legal entity. The entity named as the Offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.

PAGE TWO

(Return Page Two with Your Offer)

HOME OFFICE ADDRESS (Address for Offeror's home office/ Principal place of business):	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent):
2325 S. Stratford Road Winston-Salem, NC, 27103	7410 Northside Drive, Suite G150 North Charleston, SC 29420
PHONE NUMBER: [redacted]	
EMAIL ADDRESS: [redacted]	

PAYMENT ADDRESS (Address to which payments will be sent):	ORDER ADDRESS (Address to which all purchase orders will be sent):
P.O. Box 890856 Charlotte, NC 28289-0856	7410 Northside Drive, Suite G150 North Charleston, SC 29420
☐ Payment Address Same as Home Office Address	☐ Payment Address Same as Home Office Address
☐ Payment Address Same as Home Notice Address	☐ Payment Address Same as Notice Address
(check one only)	(check one only)

ACKNOWLEDGEMENT OF AMENDMENTS:

Offeror acknowledges receipt of amendments by indicating amendment number and its date of issue.

Amendment Number	Amendment Issue Date
1	4/21/25
2	4/21/25
3	5/5/25
4	5/9/25

MINORITY PARTICIPATION- Are you a Minority Business Enterprise: Yes ☐ No ☑
If yes, please include a copy of your certification. N/A

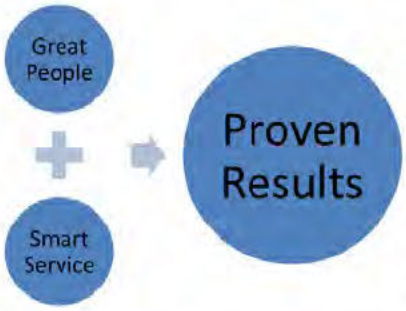
[redacted]

[redacted]

[redacted]



[redacted]



[redacted]

[redacted]

CEFP
Certified Educational Facilities Professional

[redacted]







[redacted]



[redacted]

Smart Service:
Facilities Maintenance Experience

4.0.1.3 Facilities Maintenance Experience:

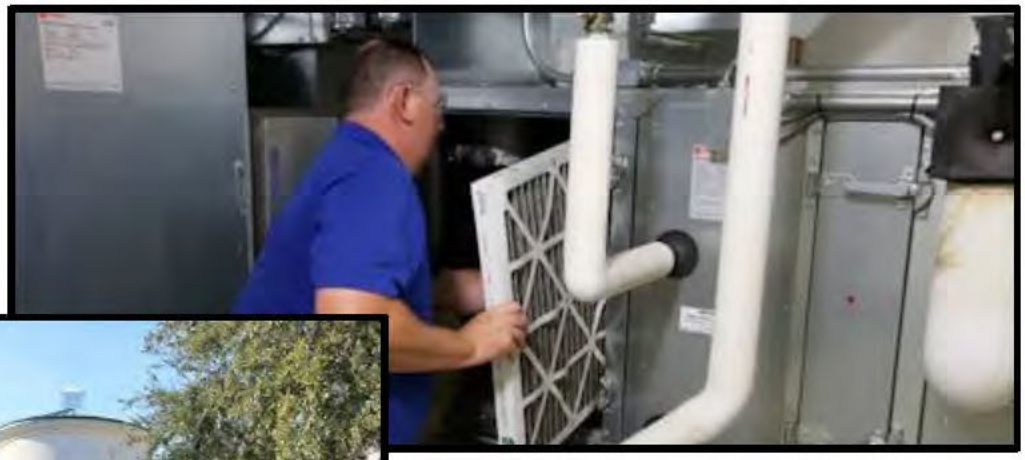
Proposer has been providing facilities maintenance services to (please check "√" next to each appropriate type of building(s) serviced and indicate number of years' experience for each checked service area)

- ✓ K – 12 school districts for 5 years;
- ✓ Publicly owned and operated facilities for 30 years;
- ✓ Privately owned and operated facilities for 37 years.

Please see **Section 4: Bidder Experience and Capabilities** for more information about our facilities maintenance management experience.



[redacted]







Smart Service:

[redacted]

[redacted]



Great People: Project Personnel

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

Supervisors.

[redacted]



Great People: Project Personnel

[redacted]



Great People: Project Personnel

[redacted]



Great People: Project Personnel

[redacted]



Great People: Project Personnel

[redacted]

[redacted]



Great People: Project Personnel

[redacted]

efforts.



Great People: Project Personnel

[redacted]

[redacted]



Great People: Project Personnel

[redacted]

[redacted]



Director of Maintenance
Job Description

Reports to: AVP of Operations, Nelson Sirin
Department: Facilities and Maintenance
FLSA Status: Exempt

OBJECTIVE/PURPOSE

The Director of Maintenance is responsible for the overall planning, organization, direction, and supervision of the maintenance and repair operations for all school district facilities, grounds, and equipment. This leadership role ensures a safe, functional, and well-maintained learning environment for students and staff. The Director develops and implements comprehensive maintenance programs, manages budgets, supervises personnel, ensures regulatory compliance, and collaborates with other district departments and stakeholders.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- Develops and implements short- and long-range maintenance plans and priorities for all district facilities, aligning with the district's strategic goals and objectives.
- Provides leadership, direction, and supervision to all maintenance personnel, including training, evaluating performance, and fostering a positive and productive work environment.
- Develops and manages the department budget, including forecasting needs, preparing budget proposals, monitoring expenditures, and ensuring cost-effectiveness.
- Ensures compliance with all applicable federal, state, and local regulations, codes, and safety standards related to building maintenance, operations, and environmental safety.
- Develops, implements, and oversees preventative maintenance programs to maximize district assets' lifespan, efficiency, and reliability, including buildings, HVAC systems, electrical systems, plumbing, and grounds.
- Manages the district's work order system, establishing efficient processes for receiving, prioritizing, assigning, tracking, and completing maintenance requests.
- Oversees and manages major maintenance projects and capital improvement projects related to maintenance, including developing scopes of work, soliciting bids, managing contractors, monitoring progress, and ensuring projects are completed on time and within budget.
- Establishes and maintains effective communication and working relationships with school administrators, principals, teachers, other district departments (e.g., transportation, food service), and external contractors and vendors.
- Conducts regular inspections of school facilities to assess maintenance needs, identify potential safety hazards, and ensure adherence to established standards.
- Develops and implements energy management strategies and practices to reduce utility consumption and promote sustainability.
- Manages the inventory of maintenance supplies, equipment, and tools, establishing efficient procurement processes and ensuring adequate stock levels.
- Develops and implements emergency preparedness and response plans related to facility maintenance issues.
- Oversees the development and implementation of safety programs and training for maintenance staff to ensure a safe working environment.
- Stays abreast of best practices and emerging technologies in facilities maintenance and management.

- Prepares and presents reports on maintenance activities, budget status, and facility conditions to the Chief Operations Officer and other district leadership as required.
- Performs other duties as assigned by the Chief Operations Officer.

POSITION SPECIFICATIONS

EDUCATION: Bachelor's degree in Facilities Management, Engineering, Construction Management, Business Administration, or a related field required. Master's degree preferred.

EXPERIENCE: Minimum of ten (10) years of progressively responsible experience in commercial facilities maintenance and management, with at least five (5) years in a supervisory or management role, preferably in a public sector or educational environment. Thorough understanding of applicable building codes, safety regulations (OSHA), environmental regulations, and ADA requirements.

SKILLS: Strong computer and business solutions software skills. Strong communication, leadership, and organizational skills. Strong interpersonal and presentation skills for interacting, training, guiding, motivating and mentoring team members, clients and company management. Proficiency in using maintenance management software and other relevant technology

CERTIFICATIONS: Professional certifications such as Certified Educational Facilities Professional (CEFP), Professional Engineer (PE), or Certified Facility Manager (CFM).

PHYSICAL DEMANDS: Ability to physically inspect facilities, including walking, standing, climbing stairs and ladders, and accessing confined spaces.May be required to work occasional evenings or weekends to attend meetings or respond to emergencies.

Assistant Director of Maintenance
Job Description

Reports to: Director of Maintenance
Department: Facilities and Maintenance
FLSA Status: Exempt

OBJECTIVE/PURPOSE

The Assistant Director of Maintenance assists the Director of Maintenance in planning, organizing, and directing the maintenance and repair operations of all school district facilities and grounds. This role involves providing technical expertise, supervising maintenance staff, managing projects, ensuring regulatory compliance, and contributing to the creation and implementation of efficient and effective maintenance programs that support a safe and functional learning environment.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- Responsible for providing strong technical guidance and leadership to staff of skilled maintenance personnel.
- Ensures preventive maintenance, repair, facilities maintenance, all machine processes, environmental issues are addressed on a timely and proactive basis.
- Oversees the maintenance budget, schedules vendors to perform specialized work, and evaluates potential new equipment or supplies for the buildings.
- Prepares reports, analyzes data, and makes recommendations for improving plant operations and solving maintenance-related problems.
- Assist in planning and implementing campus improvements.
- Conducts employee performance reviews based on job descriptions to determine competency, knowledge, and contribution of the maintenance technicians.
- Maintains and updates operating and training manuals for the maintenance department.
- Ensures that all maintenance technicians are trained on the most updated version of the operating and safety procedures.
- Reviews and monitors the operation of plant equipment and systems constantly, to minimize unplanned downtime, anticipate solve problems in a timely manner, and to identify opportunities for improvement.
- Maintains and repairs maintenance shop equipment.
- Establishes and maintains a computerized maintenance management system for tracking work orders, spare parts, and maintenance history of plant equipment.
- Monitors the use and inventories of spare parts, maintenance supplies, and equipment and initiates reordering when necessary.
- Communicates regularly with all maintenance technicians, both individually and as a group, to ensure good two-way communication concerning maintenance issues.
- Hiring of maintenance personnel.
- Initiates and carries out projects that improve efficiency and/or reduce operating costs.
- Tracks, analyzes and improves key maintenance parameters such as asset utilization, maintenance cost, PM compliance, schedule compliance, etc.
- Assist in creating RFP for Contract PM work, i.e. HVAC, elevator, etc.
- Maintains safety, health, and environmental policies and procedures.

- Ensures city, county, state, and federal regulations relating to the maintenance department are met at all times.
- Directs, maintains, and enforces the safety program for the maintenance department; reviews safety records to uphold standards of maximum safety for all maintenance technicians.
- Initiates, implements, and manages the plant maintenance program based on best practices in the industry, with an emphasis on planning/scheduling and preventive/predictive maintenance.

POSITION SPECIFICATIONS

EDUCATION: Bachelor's Degree in Facilities Maintenance, Building Maintenance Technology, Engineering or related field preferred

EXPERIENCE: At least eight (8) years of experience working in a commercial maintenance management role, including budget development, project planning, control and assurance methodologies, project management software, and finance and accounting concepts and practices. Experience in overseeing 25 or more technicians.

SKILLS: Strong computer and business solutions software skills. Strong communication, leadership, and organizational skills. Strong interpersonal and presentation skills for interacting, training, guiding, motivating and mentoring team members, clients and company management. Proficiency in using maintenance management software and other relevant technology.

CERTIFICATIONS: Professional certifications such as Certified Educational Facilities Professional (CEFP), Professional Engineer (PE), or Certified Facility Manager (CFM)

PHYSICAL DEMANDS: While performing the duties of this job, the employee is required to stand, walk, use hands to finger, handle or feel, and reach with arms and hands. The employee is required to stoop, kneel, crouch, or crawl. The employee must lift / move up to 50 pounds. Specific vision abilities required include close vision, and ability to adjust focus. Must be able to lift or move up to 50 pounds.

Area Maintenance Manager
Job Description

Reports to: Assistant Director of Maintenance
Department: Facilities and Maintenance
FLSA Status: Exempt

OBJECTIVE/PURPOSE

The Area Manager will supervise the maintenance staff to repair and improve the physical assets.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- Responsible for providing strong technical guidance and leadership to staff of skilled maintenance personnel.
- Ensures preventive maintenance, repair, facilities maintenance, all machine processes, environmental issues are addressed on a timely and proactive basis.
- Oversees the maintenance budget, schedules vendors to perform specialized work, and evaluates potential new equipment or supplies for the buildings.
- Prepares reports, analyzes data, and makes recommendations for improving plant operations and solving maintenance-related problems.
- Assist in planning and implementing campus improvements.
- Conducts employee performance reviews based on job descriptions to determine competency, knowledge, and contribution of the maintenance technicians.
- Maintains and updates operating and training manuals for the maintenance department.
- Ensures that all maintenance technicians are trained on the most updated version of the operating and safety procedures.
- Reviews and monitors the operation of plant equipment and systems constantly, to minimize unplanned downtime, anticipate solve problems in a timely manner, and to identify opportunities for improvement.
- Maintains and repairs maintenance shop equipment.
- Establishes and maintains a computerized maintenance management system for tracking work orders, spare parts, and maintenance history of plant equipment.
- Monitors the use and inventories of spare parts, maintenance supplies, and equipment and initiates reordering when necessary.
- Communicates regularly with all maintenance technicians, both individually and as a group, to ensure good two-way communication concerning maintenance issues.
- Hiring of maintenance personnel.
- Initiates and carries out projects that improve efficiency and/or reduce operating costs.
- Tracks, analyzes and improves key maintenance parameters such as asset utilization, maintenance cost, PM compliance, schedule compliance, etc.
- Assist in creating RFP for Contract PM work, i.e. HVAC, elevator, etc.
- Maintains safety, health, and environmental policies and procedures.

- Ensures city, county, state, and federal regulations relating to the maintenance department are met at all times.

- Directs, maintains, and enforces the safety program for the maintenance department; reviews safety records to uphold standards of maximum safety for all maintenance technicians.
- Initiates, implements, and manages the plant maintenance program based on best practices in the industry, with an emphasis on planning/scheduling and preventive/predictive maintenance.

POSITION SPECIFICATIONS

EDUCATION: Bachelor's Degree in Facilities Maintenance, Building Maintenance Technology, Engineering or related field preferred

EXPERIENCE: Significant experience working in a maintenance role including budget development, project planning, control and assurance methodologies, project management software and finance and accounting concepts and practices. Experience in overseeing 10 or more technicians.

SKILLS: Strong computer and business solutions software skills. Strong communication, leadership, and organizational skills. Strong interpersonal and presentation skills for interacting, training, guiding, motivating and mentoring team members, clients and company management.

PHYSICAL DEMANDS: While performing the duties of this job, the employee is required to stand, walk, use hands to finger, handle or feel, and reach with arms and hands. The employee is required to stoop, kneel, crouch, or crawl. The employee must lift / move up to 50 pounds. Specific vision abilities required include close vision, and ability to adjust focus. Must be able to lift or move up to 50 pounds.

Zone Lead
Job Description

Reports to: Area Maintenance Manager
Department: Facilities and Maintenance
FLSA Status: Exempt

OBJECTIVE/PURPOSE

The primary objective of the Zone Lead is to provide daily leadership and coordination for a team of maintenance technicians (Electrician, Plumber, and General Technicians) within a designated zone of the school district. This role ensures the efficient, effective, and safe completion of assigned maintenance tasks, work orders, and projects. It fosters a collaborative and productive team environment and serves as a key point of contact and escalation for maintenance issues within their zone.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- **Team Leadership and Supervision:** Provide daily guidance, direction, and supervision to assigned Electrician, Plumber, and General Technicians, including task assignment, workload management, and performance monitoring.
- **Work Order Management:** Review, prioritize, and assign work orders to team members based on their skills, workload, and urgency, ensuring timely and accurate completion.
- **Coordination and Communication:** Serve as the primary point of contact for maintenance issues within the assigned zone, communicating effectively with school administrators, staff, and the Area Maintenance Manager regarding work status, timelines, and any potential delays or challenges.
- **Quality Control and Inspection:** Monitor the quality of work performed by the team, conducting regular checks and inspections to ensure adherence to standards, safety protocols, and best practices.
- **Troubleshooting and Problem Solving:** Provide technical guidance and support to team members in diagnosing and resolving complex maintenance issues. May assist with hands-on troubleshooting as needed.
- **Safety Compliance:** Ensure that all maintenance activities are performed in accordance with district safety policies, procedures, and relevant regulations. Conduct safety briefings and address any unsafe practices.
- **Material and Resource Management:** Coordinate the procurement of necessary materials and supplies for assigned tasks, ensuring efficient use of resources and minimizing waste.
- **Preventative Maintenance Oversight:** Ensure the timely and accurate completion of scheduled preventative maintenance tasks within the zone.
- **Performance Feedback and Development:** Provide input to the Area Maintenance Manager on team member performance, identify training needs, and contribute to the professional development of the team.
- **Escalation:** Escalate complex or unresolved maintenance issues to the Area Maintenance Manager as necessary.
- **Documentation and Reporting:** Maintain accurate records of work completed, time spent, and any relevant observations or recommendations.

POSITION SPECIFICATIONS

EDUCATION: A high school diploma or GED is required. Vocational or technical training in a relevant trade (electrical, plumbing, HVAC, general maintenance) or equivalent experience is highly preferred. Supervisory or leadership training is a plus.

EXPERIENCE: Minimum of five (5) years of progressive experience in maintenance operations, with demonstrated leadership or supervisory responsibilities. Strong working knowledge of at least one core trade (electrical, plumbing, HVAC) and a general understanding of other building maintenance disciplines. Experience in a school district or similar institutional setting is beneficial.

CERTIFICATIONS:

SKILLS: Key skills include proven leadership and the ability to effectively supervise a diverse team of tradespeople. Strong communication, organizational, and problem-solving abilities are essential for coordinating work and resolving issues. A solid technical aptitude in general building maintenance, coupled with a strong understanding of safety protocols, is also crucial.

PHYSICAL DEMANDS: The Zone Lead role requires mobility across the assigned zone for inspections and team support, including occasional walking and climbing. While primarily supervisory, some physical exertion may be needed for troubleshooting. Good communication skills and a valid driver's license are necessary.

Grounds Manager
Job Description

Reports to: Director of Maintenance
Department: Facilities and Maintenance
FLSA Status: Exempt

OBJECTIVE/PURPOSE: The Grounds Manager is responsible for the day-to-day grounds operations.

MAJOR RESPONSIBILITIES

- Supervises, monitors, and hires grounds technicians
- Provides training for new technicians and laborers, including equipment safety training, accident procedures, and proper maintenance procedures.
- Ensures successful completion of Work Order Requests within the allotted time limits.
- Assists technicians as needed in the completion of their duties.
- Monitors supply and tool inventory levels and completes monthly inventory.
- Orders products as directed by the Assistant Director of Maintenance
- Assigns technicians to schools, laborers to crews, and equipment.
- Develops and modifies schedules to ensure maximum manpower effectiveness within budget allotments.
- Ensures that all maintenance employees follow the company's maintenance guidelines and takes personal responsibility for the condition of all properties.
- Completes truck inspections and ensures compliance with vehicle maintenance and operation guidelines. Coordinates vehicle basic maintenance (oil, filter, lube) and repair schedule.
- Delegates various job responsibilities to the technicians as needed.
- Performs annual performance reviews for technicians.
- Schedules and supervises operations meetings.
- Opens the shop daily and ensures that the shop building is left properly secured during the day.
- Responsible for inventory of all shop equipment and tools and must report any missing tools to the Branch Manager within 24 hours
- Picks up parts and supplies as needed for all maintenance operational needs.
- Spot treats nutritional, insect and disease problems within guidelines set by the company.
- Tracks employee attendance.
- Reviews all Quality Control Reports, ensures their accuracy, and generates work orders as needed.
- Submits proposals as directed by the Assistant Director of Maintenance. Submits all property damage reports to the Branch Manager within 48 hours of the damage, along with a plan of action to prevent future occurrences.

POSITION SPECIFICATIONS

EDUCATION: Minimum of a 2-year degree

EXPERIENCE: Three years' experience in the landscape maintenance field.

SKILLS: Ability to manage people to consistently maintain a very high level of quality in the landscape. Requires a proactive approach to managing all aspects of the job within the limits of authority.

CERTIFICATIONS: Must have a valid driver's license issued by the state where they reside. Pesticide license.

PHYSICAL DEMANDS: The physical demands described here represent those that an employee must meet to perform the essential functions of this job successfully. Reasonable accommodations may be made to enable individuals with disabilities to perform these functions.

PM/Paint Manager
Job Description

Reports to: Director of Maintenance
Department: Facilities and Maintenance
FLSA Status: Exempt

OBJECTIVE/PURPOSE

To ensure preservation, protection, and aesthetic upkeep of all district facilities through effective planning, management, and execution of painting and related tasks.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- Develop and implement short-term and long-term painting schedules and preventative maintenance plans for all district facilities, prioritizing needs and budget constraints.
- Manage painting projects from inception to completion, including defining scope, developing timelines, securing necessary approvals, and overseeing execution.
- Conduct regular inspections of school facilities to assess painting needs, identify areas requiring attention, and prioritize projects.
- Collaborate with other maintenance departments (e.g., carpentry, plumbing, electrical) to coordinate painting work with other facility maintenance activities.
- Develop and manage the annual painting budget, ensuring cost-effective use of resources and adherence to financial guidelines.
- Research and evaluate new painting materials, techniques, and equipment to improve efficiency, durability, and cost-effectiveness.
- Supervise and direct assigned painting staff (if any), including assigning tasks, providing guidance, and evaluating performance.
- Coordinate and oversee the work of external painting contractors, ensuring adherence to district standards, specifications, and timelines.
- Establish and enforce quality control standards for all painting work, conducting inspections to ensure workmanship meets expectations.
- Ensure compliance with all relevant safety regulations, environmental guidelines, and district policies related to painting materials and procedures.
- Maintain accurate records of painting projects, including work orders, materials used, costs, and completion dates.

POSITION SPECIFICATIONS

EDUCATION: High school diploma or GED. Vocational training. Experience as a journey-level painter. An Associate's Degree in a related field is preferred.

EXPERIENCE: Prior experience in a supervisory or lead role within a painting or maintenance team is highly valued, as the PM/Paint Manager will likely oversee staff or contractors.

SKILLS: Proven ability to plan, organize, execute, and monitor painting projects effectively, ensuring they are completed on time and within budget. Experience in sourcing and purchasing painting materials and equipment, and managing inventory levels efficiently

PHYSICAL DEMANDS: The role will require frequent walking, standing, and occasional reaching, bending, kneeling, and climbing (e.g., stairs, ladders for inspections). Fine motor skills will be needed for handling samples, using tools for minor troubleshooting, and writing or using electronic devices.

HVAC Manager
Job Description

Reports to: Director of Maintenance
Department: Facilities and Maintenance
FLSA Status: Exempt

OBJECTIVE/PURPOSE:

The primary objective of the HVAC Manager role is to lead and support the HVAC team throughout the project lifecycle by ensuring quality control, facilitating effective team coordination, conducting site inspections, troubleshooting issues, and serving as the main point of contact for the front-line service team, all while collaborating on best practices and providing hands-on training to optimize performance and achieve service, sales, and operational goals.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- Provide quality control activities throughout the project cycle, including documented site inspections, monitoring work orders in the CMMS system, and troubleshooting issues.
- Collaborate with the management team during job prospecting to identify potential challenges and ensure smooth execution by the front-line team.
- Ensure the front-line HVAC Service team has the functional equipment to complete projects.
- Manage product inventory and logistics for HVAC activities, including ownership of product deliveries and using technology to conduct site inventories for IAQ products.
- Act as the primary point of contact for resolving site-based issues while the service team is in action.
- Provide primary hands-on training for the frontline HVAC team and support all training and certification program implementation.
- In tandem with the Operations Manager, ensuring that all assigned work orders are completed on time with all required information to include labor hour log, team notes, before pictures, after pictures, and energy data where applicable.
- In tandem with the Operations Manager, ensuring that projects are completed on time, within budget, and with excellence.
- In tandem with the Operations Manager, ensure all HR-related tasks are communicated and completed.
- Effectively communicate and report back on project issues so that the Operations Manager is well informed and can take the lead on customer-level problem resolution.
- Ensuring that all site-based storage areas for equipment and product are kept neat, orderly, and that product inventory is well managed.

POSITION SPECIFICATIONS

EDUCATION: Four Year Degree or Certificate from NADCA (National Air Duct Cleaners Association) or Healthcare Environmental Services (EVS) Certification (e.g., by AHCA)

EXPERIENCE: Eight (8) Years of commercial Management Experience, 1 Year of Experience in Education IAQ (Internal Air Quality)

SKILLS: Software Skills: Google, Microsoft, Salesforce, Coupa, or experience with a CMS System are a plus; must be detail-oriented with excellent follow-up and organizational skills**,** proficiency in using technology for site inspections, CMS systems, and data tracking.

CERTIFICATIONS: EPA Section 608 Certification, HVAC Excellence, NATE Certification,

PHYSICAL DEMANDS: The physical demands described here must be met by an employee to perform the essential functions of this job successfully. While performing the duties of this job, the employee is required to stand, walk, use hands and fingers to handle or feel, and reach with arms and hands. The employee is required to stoop, kneel, or crawl. The employee is occasionally required to talk or hear. The employee must lift/move up to 50 pounds. Specific vision abilities required include close vision and the ability to adjust focus.

HVAC Supervisor
Job Description

Reports to: HVAC Manager
Department: Facilities and Maintenance

OBJECTIVE/PURPOSE:

The primary objective of the HVAC Supervisor role is to support the HVAC team throughout the project lifecycle by ensuring quality workmanship, facilitating effective team coordination on assigned projects, conducting site checks, assisting in troubleshooting issues, and serving as a key point of contact for the front-line service team. This role also supports best practices and provides on-the-job guidance to optimize team performance and contribute to service and operational goals.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- Conduct quality checks on ongoing projects, including performing site checks, monitoring assigned work orders in the CMMS system, and assisting in issue identification.
- Assist the HVAC Manager during job preparation by identifying potential challenges and ensuring the front-line team is prepared for smooth execution.
- Ensure the front-line HVAC Service team has the necessary functional equipment to complete their assigned projects.
- Assist in managing product inventory and logistics for assigned HVAC activities, including tracking product deliveries and utilizing technology for site inventory checks of IAQ products as directed.
- Serve as a key point of contact for the service team on-site, helping to resolve immediate issues and escalating complex problems to the HVAC Manager.
- Provide on-the-job guidance and support to the frontline HVAC team and assist in the implementation of training programs.
- Work with the HVAC Manager to ensure that assigned work orders are completed on time with all required information, including labor hour logs, team notes, before and after pictures, and energy data where applicable.
- Support the HVAC Manager in ensuring that assigned projects are completed on time, within the expected scope, and to a high standard.
- Support the HVAC Manager in communicating and completing HR-related tasks within the team.
- Effectively communicate project progress and any on-site issues to the HVAC Manager, ensuring they are well-informed for customer-level problem resolution.
- Ensure that assigned site-based storage areas for equipment and product are maintained neatly and in an organized manner, and assist in managing product inventory.

POSITION SPECIFICATIONS

EDUCATION: Associate's Degree or relevant vocational training in HVAC; NADCA (National Air Duct Cleaners Association) or Healthcare Environmental Services (EVS) Certification (e.g., by AHCA) is a plus.

EXPERIENCE: Five (5) Years of commercial HVAC experience, including some experience in a lead or mentoring role; exposure to IAQ (Internal Air Quality) practices is beneficial.

SKILLS: Software Skills: Familiarity with Google, Microsoft, Salesforce, Coupa, or experience with a CMS System is helpful; must be detail-oriented with good follow-up and organizational skills, and comfortable using technology for site checks and basic data tracking.

CERTIFICATIONS: EPA Section 608 Certification, HVAC Excellence, NATE Certification are desirable.

PHYSICAL DEMANDS: The physical demands described here must be met by an employee to perform the essential functions of this job successfully. While performing the duties of this job, the employee is required to stand, walk, use hands and fingers to handle or feel, and reach with arms and hands. The employee is required to stoop, kneel, or crawl. The employee is occasionally required to talk or hear. The employee must lift/move up to 50 pounds. Specific vision abilities required include close vision and the ability to adjust focus.

Great People:

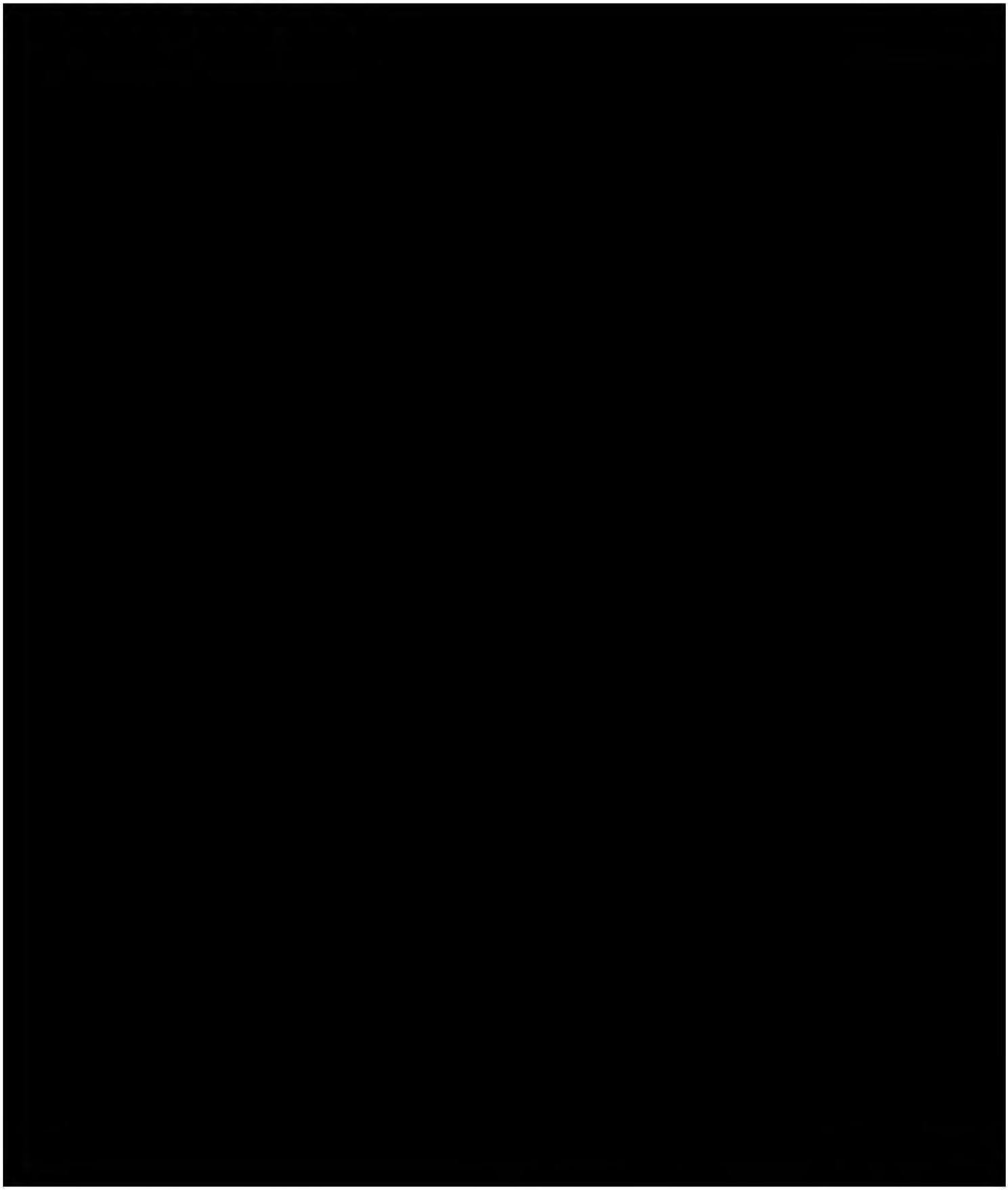
[redacted]



[redacted]



Great People:





Great People:

[redacted]



Great People:

[redacted]

[redacted]

[redacted]

[redacted]



Great People:

[redacted]

[redacted]

[redacted]



Great People:

[redacted]

[redacted]

[redacted]

[redacted]



Great People:

[redacted]

[redacted]



Great People: Employee Recruitment, Selection and On-boarding Procedures

Your students, staff, 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 facilities 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.

It is a common practice within The Budd Group to evaluate employees working at current sites for possible employment with The Budd Group. Through this thorough recruitment, selection, and onboarding process, you can be confident in our ability to provide the best team for your facilities!

Recruiting Plan

The Budd Group endeavors to recruit the very best associates available to support your students, staff, and visitors by providing a quality educational environment, remaining vigilant in seeking out industry-leading tools and best practices, and providing associates with the knowledge, skills, and disposition necessary to maximize the efficiency, cleanliness, and safety of your facilities.

We ensure the success of our recruitment efforts by focusing on the following components:

- A dedicated field recruiter will be assigned to the Beaufort County School District. This recruiter will be submerged into the local market and will have a true understanding of the labor challenges.
- Initial and regularly scheduled Job Fairs. We will host several job fairs during the implementation process to recruit current employees and potential employees in the area.
- Community networking through churches and other organizations.
- We utilize Ceridian Dayforce Recruitment which connects us with thousands of online recruiting search engines helping us quickly find potential employees.
- Weekly Recruiting and Retention Action Plan meetings.
- Maintaining a strong bench of employees to cover unexpected shortages.





Great People: Employee Recruitment, Selection and On-boarding Procedures

Selection and On-boarding Process



After all paperwork is successfully completed and an acceptable background report is complete, the following steps take place:

- The applicant is interviewed by our local Field Service Coordinator.
- The best candidates are then set up for a second interview with our Account Manager and/or Operations Manager.
- Once the interview process is complete, The Budd Group will request feedback from Beaufort County School District on each employee we propose to hire.
- If the feedback is positive and the employee has successfully completed all employment requirements, then an offer of employment will be extended to the individual.
- Candidates chosen for employment are then verified by E-Verify and required to pass a drug test administered by a local medical testing facility.
- When an agreement for employment has been made, the employee receives instruction on employee orientation, work safety, and training procedures.
- After training is complete, the employee is assigned to a specific site.



Great People: Employee Recruitment, Selection and On-boarding Procedures

Background and Drug Test Criteria

Below is a list of our employees' various background and drug test criteria.

Social Security Trace: We utilize the SSN Trace to report every address the applicant has lived at, along with any alias names associated with that individual. This information is pulled from 400 different sources of data (e.g., US Postal Forward Address info, Credit bureau, etc.) and validated with the SS number that has been run.

National Criminal Database: We search the records of the National Criminal Database using all information obtained from states using the applicants' identifiers. When a match is found, it is returned as a jurisdiction to be searched and added to the background check process.

Department of Justice/Sex Offender: We search all counties in all 50 states, except Nevada, through the Federal Department of Justice, since they have an injunction. This background search is the most comprehensive sex offender search available.

7-year Unlimited Criminal County Search: We use this search to examine any of the over 3,345 counties in the US for felony and/or misdemeanor charges based on the address history for the past 7 years.

10-Panel Swab Drug Test: We administer the most rigorous certification in drug testing to all employees. The results are always reviewed by Medical Review Officers (MROs) who are licensed physicians and toxicology experts.



As an added benefit and commitment to our customers, **The Budd Group has elected to use E-Verify® to confirm the identity and eligibility of individuals to work in the United States.** The Budd Group has voluntarily chosen to utilize this system to ensure our customers and stakeholders that our employees have the proper documentation to work within our organization.

THE WORK NUMBER® from Equifax

Additionally, The Budd Group uses The Work Number® to provide automated employment and income verifications for our front-line employees. The Work Number from Equifax is a fast and secure way to provide rapid access to information critical to the employment decision process. It simplifies the verification process and accelerates qualifying decisions through an online system available to The Budd Group 24 hours a day, 7 days a week.



Great People: Employee Recruitment, Selection and On-boarding Procedures

Drug-Free Workplace Policy

In addition to criminal background investigations, E-Verify confirmation, review of education, employment, and personal references, and a motor vehicle record investigation, The Budd Group administers drug testing to 100% of its employees. Below is an overview of our Drug-free Workplace Policy.

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 students, staff, and visitors. Our maintenance program provides a safe and healthy environment to work, and we certify that our employees will not use prohibited products while on your property.

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 must 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.

- **Post-Accident Testing –** Employees shall be tested for drugs after any accident or occurrence resulting 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, they may be terminated and forfeit eligibility for medical and indemnity benefits from Workers' Compensation insurance. Employees shall also be tested after any vehicular accident 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 annually, 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.



Smart Service:
Human Capital Management

CERIDIAN Dayforce

Ceridian Dayforce Enterprise Human Capital Management (HCM) Software combines payroll, HR, benefits, talent, and workforce management in a single cloud application to power the future of work.

Below are key components that will assist The Budd Group with managing our Beaufort County School District employees more efficiently:

- **Payroll:** Single system for timekeeping and payroll, bridging the gap between pay and time
    - **Employee Self-Service** – Employees can view and manage personal data, including pay and tax information, on their own time without relying on HR.
    - **Simple Reporting** – Catalog of reports available within the payroll screen at any time
    - **Dashboard** – All necessary data at a glance
    - **Payroll Verification** – Access to relevant forms needed to correctly identify and pay employees, all in one place within the application
    - **Mobile Access** – Employees can access pay information from a mobile device anytime.

- **Workforce Management:** Ability to quickly deploy staff schedules, review timesheets, and make edits before approving pay, resulting in better operational efficiency
    - **Decreased Labor Costs** – Ensures Managers stick to budget guidelines. Warnings can be set up to flag labor costs, such as overtime, that are outside the budget and need to be resolved before pay is finalized. Changes can also be made to shifts, ensuring everything is on target.
    - **Reduction in Compliance Concerns – Workforce management software helps** with current law and policy compliance, even as they change. Whether it's legislative rules at the federal, state, or local levels, the Software pulls real-time information needed to monitor any scenario.



Smart Service:
Uniform Program

The Budd Group recognizes that the appearance of our employees reflects on the first impressions of your students, staff, and visitors. We also recognize the importance of employee safety at each of our facilities. The Budd Group will ensure that each maintenance employee has the necessary uniform and any personal protective equipment required to perform their job. These uniforms are provided at no cost to the employee. Unless otherwise noted, the laundering and upkeep of the uniforms are the employee's responsibility. Each employee is expected to be in uniform at all times while on the job and to portray a neat and professional appearance.

We have provided sample uniforms below. The Budd Group is open to discussing any color changes or logos Beaufort County School District wants to see.







Smart Service:
Uniform Program

Uniform Policy

"The Budd Group considers it very important that you are well groomed, neat, and dressed appropriately for your job. While we trust each employee's common sense and good judgment, a dress code appropriate to the work environment must be followed. Neat, clean, proper dress and good hygiene are essential in promoting a positive company image to our customers internally and externally.

Our customers expect employees of The Budd Group to be professional in appearance as well as in the service that we provide. Your dress and appearance should project the Great People image and must be appropriate to your work situation. You will be asked to return home to correct the situation if you are improperly dressed or groomed.

To ensure your safety and maintain a professional image, only ear studs are acceptable pierced jewelry. No other visible pierced jewelry is permitted.

Your manager will inform you of apparel requirements, which may vary by customer. You will be issued uniforms when required by the job. Your uniform should be clean and always worn on the job. The Budd Group requests that uniforms not be worn outside work hours.

When you leave our employment, your uniforms must be returned.

If The Budd Group or our customer issues you an ID badge, you must wear it at all times while you are working. Failure to do so may result in disciplinary action.

Violations of this policy will result in disciplinary action. Reasonable accommodation will be made to a person with a disability or religious/moral beliefs."



General Maintenance Technician
Job Description

Reports to: Zone Lead
Department: Facilities and Maintenance
FLSA Status: Hourly

OBJECTIVE/PURPOSE

The General Maintenance Technician responsibilities are to assist in a variety of skills encompassing most of the construction trades. Needs the ability to deal tactfully, effectively and courteously with co-workers, management and our customers.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- Assist in the evaluating, repair and performing of minor plumbing, electrical and HVAC systems in the building. Plumbing to include toilets, urinals, sinks and faucets. Electrical to include switches, receptacles, lighting and breakers. HVAC to include filters, belts, PM of equipment.
- Communicates with the maintenance supervisor about any work that requires outside expert assistance.
- Perform a wide variety of general building maintenance repairs and services.
- Ability to work with tools and supplies necessary to complete tasks/projects.
- Carpentry ability to handle basic repairs around the building(s). Ability to prep and paint.
- Receive and complete work orders while maintaining accurate records on material and labor.
- Interpersonal skills to interact with employees and clients in a pleasant manner.
- Attention to detail to ensure that all jobs are completed in an exemplary manner and any potential hazards or warning signs of problems are not overlooked.
- Assist in performing routine maintenance around the building such as fixing structural damage, for example, window, door or wall repair.
- Fixing potential safety hazards to avoid injuries.
- Ability and knowledge to safely replace lighting ballast and lamps.
- Follow all safety requirements including lockout/tagout and use appropriate PPE.
- Works to complete their assigned work orders in a safe, timely and quality manner.
- Supports the Preventive Maintenance (PM) program by providing resources, ideas, and knowledge to improve the reliability of critical equipment.
- Assist with electrical wiring problems with the building's electricity, such as resetting tripped breakers.
- Workdays and schedules are generally routine, however are subject to change. Be prepared/available to work evenings and weekends as assigned.
- Willingness to share on-call duty for emergency maintenance.
- Maintain good working order of company vehicle including refueling, report any mechanical issues and filling out and submitting monthly vehicle inspection form.
- Ability to carry, extend and climb ladders safely.
- Needs the ability to work independently or as part of a team and follow oral and written instructions.
- May be asked to work with or escort contractors, vendors or suppliers, as well as inspectors.
- OT may be required without notice to complete work assigned – time off may be offered or required within the same pay period to meet budget demands.

POSITION SPECIFICATIONS

EDUCATION: Requires high school or equivalent. One-year certificate from college or technical school, or one year related experience and / or training; or equivalent combination of education and experience.

CERTIFICATES, LICENSES, REGISTRATIONS:

EXPERIENCE: Requires five (5) years of experience working in a commercial maintenance role.

SKILLS: Must have working knowledge of HVAC, plumbing, carpentry, lighting and electrical repair skills.

PHYSICAL DEMANDS: While performing the duties of this job, the employee is required to stand, walk, use hands to finger, handle or feel, and reach with arms and hands. The employee is required to stoop, kneel, crouch, or crawl. The employee must lift / move up to 50 pounds. Specific vision abilities required include close vision, and ability to adjust focus.

Door Mechanic/Locksmith
Job Description

Reports to: Assistant Director of Maintenance
Department: Facilities and Maintenance
FLSA Status: Exempt

OBJECTIVE/PURPOSE

The primary objective of the Door Mechanic/Locksmith is to ensure the security, functionality, and safety of all doors, locking mechanisms, and related hardware within the school district. This includes installing, repairing, maintaining, and adjusting various types of doors, locks, panic hardware, door closers, and access control systems to provide a secure and accessible environment for students, staff, and visitors.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- **Installation:** Install new doors (wood, metal, hollow metal), door frames, various types of locks (cylindrical, mortise, high-security), panic hardware, door closers, hinges, thresholds, and other related hardware according to specifications and building codes.
- **Repair and Maintenance:** Inspect, diagnose, and repair malfunctions in existing doors and hardware, including lockouts, broken mechanisms, damaged doors, misaligned frames, and faulty closers. Perform preventative maintenance to ensure optimal operation and longevity of door systems.
- **Lock Servicing:** Rekey and master key lock systems, cut keys, and maintain accurate key records. Repair and replace lock cylinders, cores, and other lock components.
- **Access Control Systems:** Install, troubleshoot, and maintain basic electronic access control systems, including card readers, keypads, electric strikes, and magnetic locks (depending on the district's scope).
- **Welding and Fabrication:** Perform minor welding and fabrication tasks as needed to repair or modify door frames and hardware.
- **Code Compliance:** Ensure all installations and repairs comply with relevant building codes, fire codes, and ADA (Americans with Disabilities Act) requirements.
- **Emergency Response:** Respond to emergency calls for lockouts, security breaches, or malfunctioning doors that pose a safety risk.
- **Documentation:** Maintain accurate records of work performed, materials used, and keying systems.
- **Collaboration:** Work effectively with other maintenance personnel, school administrators, and external contractors.
- **Inventory Management:** Assist in managing the inventory of locks, hardware, and tools

POSITION SPECIFICATIONS

EDUCATION: A high school diploma or GED is required. Completing a locksmithing apprenticeship program or vocational door hardware and security training is highly preferred.

EXPERIENCE: Minimum of 3-5 years of experience as a locksmith or door mechanic, with a strong understanding of various types of doors, locks, and hardware. Experience with access control systems is a plus. Familiarity with building codes and ADA requirements is essential. Experience in an institutional or educational setting is beneficial.

CERTIFICATIONS:

SKILLS: The ideal candidate will possess strong locksmithing expertise and a comprehensive understanding of various door hardware types. Excellent mechanical aptitude and proven troubleshooting skills are essential for diagnosing and resolving issues effectively. Familiarity with relevant building codes and a keen attention to detail are crucial for ensuring safety and compliance. Effective communication and organizational skills are also necessary to interact with school personnel and manage workload.

PHYSICAL DEMANDS: This position requires significant physical mobility, including frequent standing, walking, bending, kneeling, and climbing. The ability to lift and carry objects weighing up to 50-75 pounds occasionally is necessary. Good manual dexterity and hand-eye coordination are essential for working with tools and hardware. Candidates must also be able to tolerate various environmental conditions within school buildings and possess a valid driver's license for travel between sites.

Generator Technician
Job Description

Reports to: Assistant Director of Maintenance
Department: Facilities and Maintenance
FLSA Status: Hourly

OBJECTIVE/PURPOSE

The primary objective of the Generator Technician is to perform maintenance, repair, and installation of various types of generator systems, ensuring reliable backup power for our clients. This role involves diagnosing issues, completing necessary repairs, and adhering to safety standards to maintain the operational readiness of critical power equipment.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- **Maintenance and Inspection:** Conduct routine preventative maintenance on generators, including inspecting components, checking fluid levels, replacing filters, and performing necessary adjustments.
- **Troubleshooting and Diagnostics:** Identify mechanical and electrical faults in generator systems using diagnostic tools, technical manuals, and schematics.
- **Repair and Replacement:** Repair or replace defective components such as engines, alternators, control panels, wiring, and fuel systems.
- **Installation:** Install new generator systems, ensuring proper electrical connections, fuel supply lines, exhaust systems, and grounding according to manufacturer specifications and relevant codes.
- **Testing and Commissioning:** Perform load bank testing and other functional tests to verify proper generator operation and ensure it meets performance standards.
- **Emergency Service:** Respond to emergency service calls for generator failures, diagnose the issue quickly, and perform necessary repairs to restore power.
- **Documentation:** Maintain accurate records of all maintenance, repair, and installation work performed, including parts used and time spent.
- **Safety Compliance:** Adhere to all company safety policies, procedures, and relevant industry regulations while performing tasks.
- **Customer Interaction:** Communicate effectively with clients regarding the status of their generator systems, explaining findings and recommended solutions in a clear and professional manner.
- **Tool and Equipment Maintenance:** Ensure that all assigned tools and equipment are properly maintained and in safe working order.
- **Continuous Learning:** Stay up-to-date with the latest generator technology, industry standards, and best practices through training and professional development.

POSITION SPECIFICATIONS

EDUCATION: A high school diploma or GED is required. Vocational or technical training in electrical technology, diesel mechanics, or a related field is highly preferred.

EXPERIENCE: Minimum of [Insert Number] years of experience in the maintenance, repair, and installation of generator systems. Experience with various generator brands and sizes is beneficial.

SKILLS: Key skills include a strong understanding of electrical and mechanical principles related to generator operation. Proficiency in using diagnostic tools and test equipment is essential. The ability to read and interpret electrical schematics and technical manuals is crucial. Excellent troubleshooting, problem-solving, and manual dexterity are required. Strong communication and customer service skills are also important.

PHYSICAL DEMANDS: The Generator Technician role requires physical mobility to access and work on generator systems in various locations and environments, including lifting heavy components, bending, kneeling, and standing for extended periods. A valid driver's license and a clean driving record are necessary for travel to job sites.

Life Safety/Low Voltage Technician
Job Description

Reports to: Assistant Director of Maintenance
Department: Facilities and Maintenance
FLSA Status: Exempt

OBJECTIVE/PURPOSE

The primary objective of the Life Safety/Low Voltage Technician is to install, maintain, troubleshoot, and repair a variety of low voltage systems, with a strong emphasis on life safety systems such as fire alarm, access control, and security systems, ensuring their reliable and effective operation to protect personnel and property within the school district. This role also encompasses work on other low-voltage systems, including intercom, paging, and clock systems, contributing to the overall safety, security, and communication infrastructure of the district.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- **Installation:** Install new life safety and low voltage systems, including fire alarm control panels, initiating and notification devices, access control readers and panels, security cameras, intercom systems, paging speakers, and synchronized clock systems, adhering to relevant codes, standards, and manufacturer specifications.
- **Maintenance:** Perform routine inspections, testing, and preventative maintenance on all assigned life safety and low-voltage systems to ensure proper functionality and compliance with local, state, and federal regulations.
- **Troubleshooting and Repair:** Diagnose and repair malfunctions in life safety and low-voltage systems, including electrical faults, wiring issues, component failures, thermostats, sensors and software/programming problems. Respond promptly to service calls and emergency situations.
- **Programming and Configuration:** Program and configure system parameters for fire alarm panels, access control systems, security systems, intercoms, and clocks as required for new installations, modifications, or repairs.
- **System Testing and Certification:** Conduct thorough testing of installed or repaired systems to verify proper operation and compliance with relevant codes and standards, completing necessary documentation and certifications.
- **Documentation:** Maintain accurate records of installations, inspections, maintenance activities, repairs, and system configurations.
- **Collaboration:** Work effectively with other maintenance personnel, IT staff, school administrators, and external contractors to coordinate projects and resolve system issues.
- **Code Compliance:** Stay current with all applicable local, state, and national codes and standards related to life safety and low voltage systems (e.g., NFPA 72, NFPA 101, ADA).
- **Training and Support:** Provide basic training and support to end-users on operating life safety and low-voltage systems.
- **Inventory Management:** Assist in maintaining an inventory of necessary parts, tools, and equipment.

POSITION SPECIFICATIONS

EDUCATION: A high school diploma or GED is required. Preference will be given to candidates who have completed vocational or technical training in electronics, electrical, or low-voltage systems.

EXPERIENCE: Candidates must possess a minimum of ten (10) years of practical experience in the installation, maintenance, troubleshooting, and repair of low-voltage systems, with a strong emphasis on life safety systems, including fire alarm, access control, and security systems.

CERTIFICATIONS: BICSI or similar

SKILLS: Essential skills include strong technical knowledge of low voltage and life safety systems, excellent troubleshooting and programming abilities, and proficiency in testing. Must be safety-conscious with good communication.

PHYSICAL DEMANDS: Essential skills include strong technical knowledge of low voltage and life safety systems, excellent troubleshooting and programming abilities, and proficiency in testing. Must be safety-conscious with good communication.

Painter
Job Description

Reports to: PM/Paint Manager
Department: Facilities and Maintenance
FLSA Status: Hourly

OBJECTIVE/PURPOSE

The Painter can assist in various skills encompassing most of the construction trades, assisting other skilled trades, and ensuring that tools and materials are available at the job site. Ability to deal tactfully, effectively, and courteously with co-workers, management, and our customers.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- Conduct regular building tours, inspections, identifying needs and executing corrective action and/or coordinating with management and outside contractors.
- Excellent knowledge of painting material and how to select, mix and apply them
- Solid knowledge of commercial and/or construction painting techniques
- Aptitude in using appropriate tools (brushes, caulking guns etc.)
- Read blueprints/instructions and examine surfaces to determine the kind and amount of work necessary
- Make on-site preparations such as building scaffolding, covering fixtures etc.
- Protect all nearby furnishings and building materials before and during every painting job, including carpets, cabinetry, outlet covers, lighting fixtures and landscaping
- Prepare walls and other surfaces for painting by scraping, using sandpaper, removing old paint etc.
- Fill nail holes, cracks, and joints with putty, plaster, or other filler.
- Select premixed paints or mix required portions of pigment, oil, and thinning and drying substances to prepare paint to match specified colors.
- Receive and complete work orders while maintaining accurate records on material and labor used.
- Maintain inventory of tools and assist with inventory control of materials and equipment.
- Follow established safety procedures and techniques to perform job duties, including lifting, climbing, etc.
- Store, handle and dispose of paint, stain, varnish, and other chemicals according to established procedures.
- Able and willing to work independently and as a team member
- Workdays and schedules are generally routine, however are subject to change. Be prepared/available to work nights or weekends, on a rotating basis, to service emergency needs of our customers.
- Following all safety requirements including lockout/tagout and use appropriate PPE
- Identify and report to Maintenance Supervisor potential opportunities for additional business (newer system, service contracts, and additional services).
- OT may be required without notice to complete work assigned – time off may be offered or required within the same pay period to meet budget demands.
- Maintain good working order of company vehicle including refueling, report any mechanical issues and filling out and submitting monthly vehicle inspection form.

POSITION SPECIFICATIONS

EDUCATION: High school diploma or equivalent. Successful completion of apprenticeship.

CERTIFICATES, LICENSES, REGISTRATIONS:

EXPERIENCE: Requires five (5) commercial painting experience.

SKILLS: Conscientious with great attention to detail. Manual dexterity with excellent balance to work on scaffolding, ladders, etc. Excellent customer service skills with desire to exceed customer expectations.

PHYSICAL DEMANDS: While performing the duties of this job, the employee is required to stand, walk, use hands to finger, handle or feel, and reach with arms and hands. The employee is required to stoop, kneel, crouch, or crawl. The employee must lift / move up to 50 pounds. Specific vision abilities required include close vision, and ability to adjust focus.

Plumber
Job Description

Reports to: Zone Lead
Department: Facilities and Maintenance
FLSA Status: Hourly

OBJECTIVE/PURPOSE

The Plumber possesses the ability to assist in a variety of skills encompassing most of the construction trades; assisting other skilled trades; and ensuring that tools and materials are available at job site. Possess the ability to deal tactfully, effectively and courteously with co-workers, management and our customers.

MAJOR RESPONSIBILITIES AND FUNCTIONS

- Conduct regular building tours, inspections, identifying needs and executing corrective action and/or coordinating with management and outside contractors.
- Proven experience as a plumber
- Cutting, assembling and installing pipes and tubes with attention to existing infrastructure
- Locate and repair issues with water supply lines and drains.
- Installing and maintaining water supply systems
- Repair or replace broken drainage lines, clogged drains, faucets etc.
- Install waste disposal and sanitary systems with well-functioning DWV systems
- Ability to handle plumbing tools and equipment (pipe wrenches, pipe cutters, plungers etc.)
- Follow state laws and regulations and adhere to local building codes
- Possess the ability to work independently and as a team member
- Workdays and schedules are generally routine, however are subject to change. Be prepared/available to work nights or weekends, on a rotating basis, to service emergency needs of our customers.
- Maintain good working order of company vehicle including refueling as necessary, reporting any mechanical issues, and filling out and submitting monthly vehicle inspection form.
- Following all safety requirements including lockout/tagout and use appropriate PPE.
- Maintain proper stock, parts, tools, and safety equipment in the vehicle.
- Document all installed equipment: make, model, serial number, type of fuel, necessary test measurements, and pictures as necessary.
- Diagnose diverse service issues, obtain any replacement parts, calibrate system to manufacturer's recommendations, and explain fully to Maintenance Supervisor what the issue is and what is needed to correct.
- Complete work orders and record material utilized on jobs. Receive and complete work orders while maintaining accurate records on material and labor.
- Participate in company provided training opportunities on latest industry technologies.
- Identify and report to Maintenance Supervisor potential opportunities for additional business (newer system, service contracts, and additional services).
- OT may be required without notice to complete work assigned – time off may be offered or required within the same pay period to meet budget demands.

- Good communication and interpersonal skills
- Maintain good working order of company vehicle including refueling, report any mechanical issues and filling out and submitting monthly vehicle inspection form.

POSITION SPECIFICATIONS

EDUCATION: High school diploma or equivalent. A certificate degree or a two-year degree in a plumbing program from a trade school or community college is preferred, or completion of a plumbing apprenticeship program.

CERTIFICATES:

EXPERIENCE: Requires seven (7) years of experience in commercial inspection, installation, maintenance, and troubleshooting plumbing systems and equipment.

SKILLS: Good analytical skills and attention to detail with the ability to read and interpret blueprints, plumbing diagrams and manufacturer's installation manuals**.** Excellent customer service skills with desire to exceed customer expectations.

PHYSICAL DEMANDS: While performing the duties of this job, the employee is required to stand, walk, use hands to finger, handle or feel, and reach with arms and hands. The employee is required to stoop, kneel, crouch, or crawl. The employee must lift / move up to 50 pounds. Specific vision abilities required include close vision, and ability to adjust focus.

Smart Service:
Implementation Plan

With a rich history spanning over 60 years, The Budd Group has honed its expertise and built a solid reputation in managing numerous account transitions for public K-12 school systems. This extensive experience is a testament to our ability to navigate complex transitions with ease and efficiency.

Dedicated Implementation Team

[redacted]



Smart Service:
Implementation Plan

facilities and value them as part of our successful maintenance program. We appreciate their knowledge of your facilities and their relationships with your students, teachers, principals, and staff. As part of our seamless transition plan, ***we desire to keep valuable existing employees who will assist us in meeting and exceeding all your goals.***

Strategy

Throughout the transition period, The Budd Group maintains a transparent and continuous line of communication, reassuring the staff that there is nothing to fear and ensuring transitioned employees' loyalty and consistent productivity. We also take great care in gathering important information essential to understanding the needs of staff and every relevant aspect of current operations. We will meet with HR teams, management personnel, and employees to discuss details of the transition process, including benefits information, training requirements, and our quality assurance program.

Throughout the transition, we will continue to provide associates with all the training and development they need to succeed and incorporate a ***continuous improvement plan*** that includes routine feedback from Beaufort County School District representatives and transitioned employees.

Phased Approach

The Budd Group's transition process and implementation plan are executed over five identifiable phases of successful implementation management. Our approach to launching a new client account is based on designing and implementing a customized transition plan based on each client's individual needs and environment. A typical transition plan will last anywhere from 30 to 90 days, depending on the size and complexity of the project. With careful collaboration with Beaufort County School District, we will implement the following plan to ensure a smooth operation. The plan speaks to our abilities to successfully transition large accounts in a minimal amount of time.

Phase I

Project Conception & Initiation
Begins with ***the BCSD team, operations, and sales team***.

- The sales team works jointly with the operations team to ensure that the key performance indicators set in the proposal process are understood and a clear execution plan is formulated.
- ***Review of existing contracts and existing facilities***

Phase II

Project Planning
Developing a road map that everyone will follow begins with setting up an implementation plan that outlines ***goals to achieve, target completion dates, and individual responsibilities.***

- ***Plans for retaining current qualified and experienced maintenance employees***
- Identifies high-level goals that must be met throughout and includes them in a Gantt Chart (*see sample on the following page*).
- ***Recruitment of key staff***



Smart Service:
Implementation Plan

THE BUDD GROUP
Great People ▸ Smart Service

- The Sales Team provides enough information about budgets, equipment needed, staffing needed, and scope of work to begin planning for the new startup.
- Provides a visual timeline to plan out tasks and visualize the implementation timeline.
- ***Review of District operating procedures and policies***

Phased Approach

Sample Implementation Gantt Chart



Beaufort Maintenance 2025 Summary Plan Task

State	Project Summary (Maintenance)	Owner
	Data Gathering Maintenance	
Corp Maint Team & CoE Team	a. CMMS Review Floor Plans / Spec's (Onsite)	Maintenance SME
Corp Maint Team & CoE Team	b. CMMS Collect Data (Room #, Room Types, Etc.)	Maintenance SME
	Client Reviews / Project Meeting	
Yes - Local Team & CoE Team	a. Four (8) One Hour Project Meetings (Core Team)	CoE IM Manager
Yes - Local Team & CoE Team	b. Four (8) One Hour Project Meetings (Customer)	CoE IM Manager
	Recruiting/Onboarding Activities	
Yes - Local Team & CoE Team	a. Build Staffing Plan Specific To Pricing Sheet	CoE IM Manager
Yes - Local Team & CoE Team	b. Five (5) Days Corp Recruiting Manager Assist	CoE IM Manager
	Equipment	
Corp Maint Team & CoE Team	**a. Evaluate/Place Order Large Tools**	CoE IM Manager
Corp Maint Team & CoE Team	b. Evaluate / Place Order Small Tools	CoE IM Manager
Corp Maint Team & CoE Team	c. Evaluate / Materials (Filters, Greece, Etc.)	CoE IM Manager
Yes - Local Team & CoE Team	d. Equipment & Smallwares Distribution Manifest	CoE IM Manager
Yes - Local Team & CoE Team	e. Receiving Equipment / Asset Tagging	CoE IM Manager
	Develop Maintenance Programs	
Yes - Local Team & CoE Team	a. Evaluate / Coach Management	CoE IM Manager
Yes - Local Team & CoE Team	b. Evaluate / Coach Frontline Staff	CoE Regional Trainer
	Optional Items	
Corp Maint Team & CoE Team	a. Develop CMMS Key Performance Indicators	Maintenance SME
Corp Maint Team & CoE Team	b. Ensure HVAC Subcontracted Barnhardt Installed	Maintenance SME
Corp Safety Team	c. Safety Provide Job Hazard Assessments	Maintenance SME
Yes - Local Team & CoE Team	d. Develop Support Manager Plan & Schedule	Maintenance SME
	Number Of Days To Implement (Maintenance)	



Beaufort Maintenance 2025 Detail Implementation Plan

Tasks and Deliverables	Start Date	Target Finis
Data Gathering -- RFP Strength	**01/08/24**	**02/16/24**
Data Collection - Do we have full maps of campus, buildings floor plans, etc.	01/08/24	02/16/24
TBG Reach Out To Customer For Maps	01/08/24	02/16/24
TBG Ensure you have maps for each building.	01/08/24	02/16/24
Data Collection - Has data for each building (square feet per room, per building, etc.) be collected?	01/08/24	02/16/24
TBG to walk each building to validate sqft.	01/08/24	02/16/24
TBG to use spec. sheet to collect data	01/08/24	02/16/24
SOW Review - Do we have a SOW in our possession?	01/08/24	02/15/24
Both IM Team & Local Team have copies.	**01/08/24**	02/15/24
Client Discovery Questions - Site Specific	**01/08/24**	**03/15/24**
Discovery - Does the IM Manager have all Client Discovery Question answers as needed?	01/08/24	03/15/24
Human Resources & Onboarding	**01/08/24**	**03/01/24**
Local Management - Final Selection Complete/Start Date Agreed/New Managers Checklist initiated per Employee Activation Form.	01/08/24	04/12/24
Incumbent Staff - Scheduled/conducted meeting(s) for current employees client wishes to retain?.	02/05/24	03/08/24
Incumbent Staff - Were background checks/drug screenings for employees completed?	02/05/24	03/08/24
Incumbent Staff - Have eVerify been completed for Incumbents? 7 days prior to start date?	02/05/24	03/08/24
Incumbent Staff - Offer letters from current staff signed?	02/05/24	03/08/24
New Talent - Have we scheduled/conducted hiring event/meeting for New Talent?	02/05/24	04/19/24
New Talent - Were background checks and drug screenings for New Talent completed?	02/05/24	04/19/24
New Talent - Have eVerify been completed for New Talent? 7 days prior to start date?	02/05/24	04/19/24
Alternative Labor - Identify solutions for ALL remaining staffing needs to include Alternative Solutions	02/05/24	04/19/24
Branch Management involved for solutions	02/05/24	04/19/24
Labor Law Posters - Order needed labor law posters needed for job site.	02/05/24	04/19/24
Uniforms Orders	**02/05/24**	**04/19/24**
Uniform Order - Order all uniforms after determining quantity and sizes.	02/05/24	04/04/24
Order Maintenance uniforms via Bennett (Brand Ambassador)	02/05/24	04/04/24
Receive Uniforms - Required uniforms delivered from vendors	04/08/24	04/19/24
Organize uniforms for distribution (sort by size, sort by employee, etc.)	04/08/24	04/19/24
Uniform Distribution - Uniforms shall be issued at New Hire Orientations	04/01/24	04/05/24
CapEx Large Equipment	**01/08/24**	**04/15/24**
Requirement to have RD/DM and Procurements review & approve all orders.	02/23/24	03/20/24
Asset Management Tags placed on equipment per protocol	04/03/24	04/12/24
Communication Equipment - Order Site Management Laptop(s) & Cell Phone(s).	01/08/24	04/15/24
Order Site Management Cell Phone, Tablets, Hotspots	01/08/24	04/15/24
Truck, Van, Golf Cart - (Optional) Order Necessary Fleet/Transportation Vehicles.	01/15/24	03/08/24
Non CapEx Smallwares Supplies & Equipment	**01/08/24**	**04/12/24**
Tools & Equipment - Create list of "Non CapEx Equipment" needs based on requirements.	02/19/24	03/15/24
Select location and dates for deliveries and schedule 1 delivery date.	02/19/24	03/15/24
Deliveries and dates are provided by selected vendor and monitored daily.	02/19/24	03/15/24
Tools & Equipment - Place equipment orders and arrange for delivery solutions	02/23/24	03/20/24
Requirement to have RD/DM and Procurements review & approve all orders.	02/23/24	03/20/24
Tools & Equipment - Receive all equipment & Inventory For Accessories Needed	04/03/24	04/12/24
Billing & Accounting	**01/08/24**	**03/01/24**
Billing/Accounting - All billing requirements need to be discussed and finalized.	01/08/24	03/01/24
If there is not a contract in place we would engage COO for approval to pass a job # from NetSuite to Avionte for recruiting purposes.	01/08/24	03/01/24
If we get a "yes" contact Mary and Shaun with authorization from COO	01/08/24	03/01/24
Additional Vendors - (If not already) Establish Vendor accounts for Supplies, Uniforms, Equipment, etc.	01/08/24	03/01/24
Billing Frequency, Invoice Format, Bill To information	01/08/24	03/01/24
Quality Program	**03/18/24**	**04/12/24**
Building assignment to maintenance techs to do walk throughs and generate work orders		
If applicable, creat a "Tour Route" and establish who/when		
System Setup & Training	**03/18/24**	**04/15/24**
Management Training	04/01/24	04/15/24
Management Training - Schedule & Conduct any required training for Manager(s)	04/01/24	04/12/24
See that Management New Hire Checklist has been created/assigned.	04/01/24	04/12/24
Management Training - Validation of Manager & Supervisor Vendor Supported Training	04/12/24	04/15/24
RD/BM must indicate satisfaction with training for management staff.	04/12/24	04/15/24
Front Line / Supervisor Training - Schedule & Conduct any required Frontline Staff(s)	04/12/24	04/15/24
See that Frontline New Hire Checklist has been created/assigned.	04/12/24	04/15/24
Job duties and responsibility training	04/12/24	04/15/24
System Setup - Key Controls(Optional) multiple buildings with keys that need managed.	03/18/24	03/29/24



Get an inventory of keys from client (Review Help Link)	03/18/24	03/29/24
Develop a workflow for key control (Review Help Link)	03/18/24	03/29/24
System Setup - Ensure that time keeping systems are setup and testing for accurate time-keeping.	03/18/24	03/29/24
Work with customer to establish designated phones (encourage separate line from switchboard)	03/18/24	03/29/24
Safety	**03/18/24**	**03/29/24**
Safety - Has there been a Safety Training Programs for all safety requirements?	03/18/24	03/29/24
Safety - Determine Local Medcor Facility	03/18/24	03/29/24
Local FSC's should set up a facility for drug testing and injuries.	03/18/24	03/29/24
Safety - Are SDS Posters, SDS Binders & SDS Inserts setup?	03/18/24	03/29/24
SDS Inserts for the 20 most common chemical shall be ordered from print vendor 30 days out.	03/18/24	03/29/24
Tool Box Safety Talks and on-going Safety Training		
New Hire Orientation(s)	**04/01/24**	**04/29/24**
Orientation - Review Orientation Slides/Warm Welcome Packet.	04/01/24	04/05/24
Format of "Orientation Shall Be Scripted Prior to Execution" of event.	04/01/24	04/05/24
Orientation - Schedule/Conduct New Hire Orientation.	04/19/24	04/29/24
The event should be warm and friendly for all participants.	04/19/24	04/29/24
Uniform Distribution - Uniforms shall be issued at New Hire Orientations	04/19/24	04/29/24
Uniforms to be distributed at Orientation.	04/19/24	04/29/24
Operational Commitment: Three Days Prior	**04/01/24**	**04/30/24**
Pre-Go-Live - Conduct final Inspection of all site materials for readiness:	04/22/24	04/30/24
Pre-Go-Live - Be sure to review of all staffing positions and duties:	04/22/24	04/30/24
Ensure that all staff understand duties for Day 1 - Day 10 .	04/22/24	04/30/24
IM Manager work with RD/BM on support management for Week 1	04/01/24	04/05/24
Pre-Go-Live - Schedule Job Start Review meeting with Budd Management	04/01/24	04/05/24
All keys been transferred from client to Budd Group team.	04/01/24	04/05/24
All staff have badges to access areas (to included dispenser keys)	04/01/24	04/05/24
The End		



Smart Service:
Implementation Plan

THE BUDD GROUP
Great People ▸ Smart Service

Phased Approach

Phase III

Project Execution
It often feels like the heart of the project. A "kick-off" meeting marks the start of the Project Execution phase.

- The Project Sponsor(s) and executive (s) play an important role as they will ensure the project is executed in accordance with client and company requirements.
- The Implementation Specialist is ultimately responsible for managing the project and ensuring that deliverables meet client and company requirements.
- Project Leads/Extra Resources will follow the direction of the Implementation Specialist in completing various task(s) relating to the implementation plan and project.

Phase IV

Project Performance & Monitoring
Often co-occurs with other phases. Includes measuring project progression to ensure goals align with the project plan.

- Client(s) must be open to assisting with all discovery questions, as these are critical to meet the overall execution of the transition.
- Account Management is identified and on-boarded in a timely & effective fashion.
- Hiring events/meetings for "Incumbent & New Hires" are organized.
- The process for ordering uniforms will be organized to meet the client and company's needs.
- Process will be straightforward for ordering and delivering large equipment and small supplies.
- Process for ensuring there is a quality plan in place.
- Ensuring that all systems are set up correctly and that training is provided on those systems.
- Process for ensuring the safety of our employees and compliance with regulations.
- Providing a proper orientation and warm welcome to new employees.
- Week 1 - Week 4 process for providing additional management support and continuous improvement plan.



Smart Service:
Implementation Plan

THE BUDD GROUP
Great People ▸ Smart Service

Phased Approach

Phase V

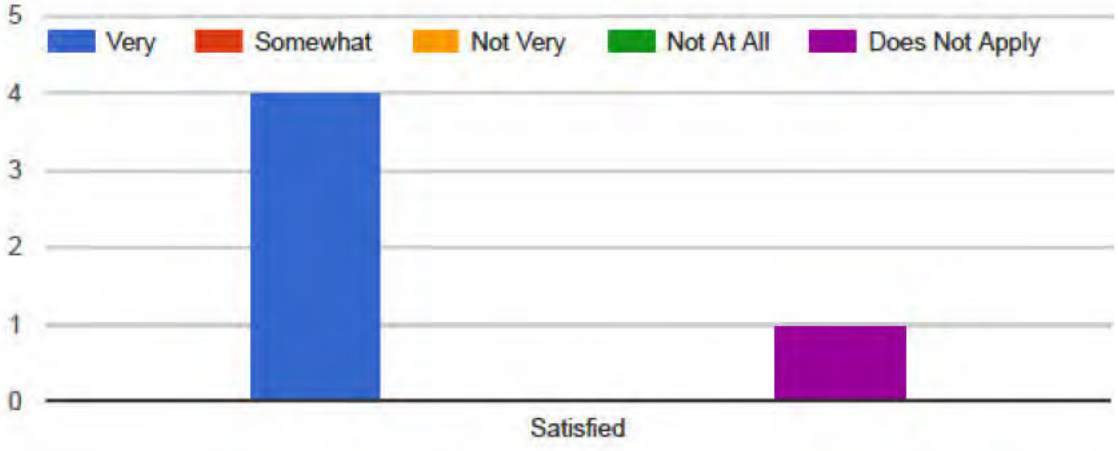
Project Closure

Once the project is complete, Project Managers still have tasks to complete. They will utilize project punch lists of things that didn't get accomplished during the project and work with team members to complete them. They will also perform a final project budget review and prepare a final project completion report review.

- Once the initial transition phase is complete, every employee, supervisor, and manager involved will be appropriately trained; however, The Budd Group will continue to support the team continuously.
- Our dedicated Implementation Team will receive ongoing feedback from our onsite operations team and representatives. The Implementation Team will gradually reduce its transition management over the contract as Budd Group employees are performing effectively under the leadership of The Budd Group Account Manager. Regional and corporate support personnel will remain heavily involved with the account's ongoing support. Likewise, our onsite management and operations teams are trained and prepared to respond to ongoing needs and any changes in service and specifications.
- We motivate our employees to deliver the best value with value-added services. Equally, we encourage our employees to continually seek opportunities to better service our customers throughout the lifetime of our partnerships with all our clients.

Post Transition Measures

Sample Implementation Survey





Smart Service:
Warehouse Management Process



During the site tour, the Beaufort County team expressed a need for a more efficient, more organized warehouse management process. The Budd Group's solution for this need includes the strategic adoption of the ***5S Program*** within our warehouse management, which will establish a ***highly organized, efficient, and safe environment for our maintenance teams.*** By systematically applying Sort, Set in Order, Shine, Standardize, and Sustain, we will demonstrably ***improve the accessibility and visibility of critical maintenance inventory, minimize wasted time searching for parts and supplies, and optimize the utilization of your existing warehouse space.***

This structured approach will directly support the onsite teams with readily available resources, ***streamline work order fulfillment,*** and foster a culture of ***continuous improvement*** within your maintenance operations. Ultimately, this will lead to ***increased productivity, more accurate inventory control, and a safer, more effective workplace for your maintenance personnel,*** directly contributing to Beaufort County's schools' improved upkeep and functionality.

To accomplish this, we established the following initiatives:

As part of the Implementation Process, our Warehouse Implementation Manager, Shane Hanna, will spearhead the organization of the 5S Program for the maintenance warehouses through four distinct phases. Shane is skilled in leveraging Six Sigma, 5 S Processes, and ISO Quality System methodologies.

Phase I: Beaufort County Discovery and Preparation:

- Conduct walkthroughs of the Beaufort County maintenance warehouses and 5S audits of warehouse space
- Collect historical inventory data (usage, reorder levels, shortages/overstock)
- Interview warehouse staff to understand the workflow and staging needed
- Document existing processes (receiving, storing, picking, shipping)
- Map the current warehouse layout and material flow

Phase II: Planning the Strategy:

- Use inventory to identify non-value-added assets
- Classify inventory using ABC analysis (sorting, tagging, etc.)
- Estimate carrying costs for discarding assets tagged as waste
- Redesign warehouse layout for optimal flow and accessibility
- Prioritize changes (e.g., space utilization, safety, inventory accuracy)
- Create action plans for each initiative with timelines and resource needs.



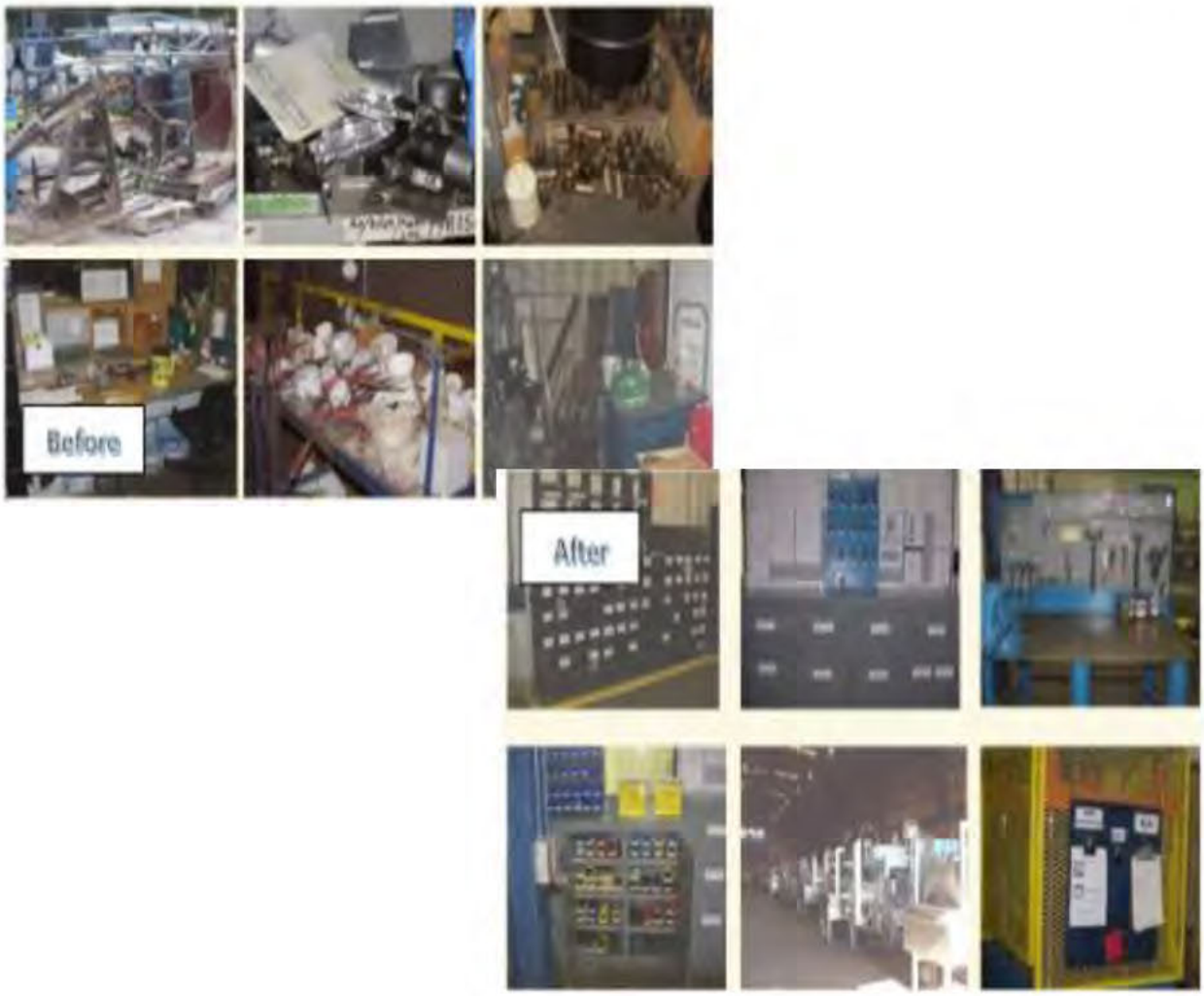
Smart Service:
Warehouse Management Process

Phase III: Implementing Lean Strategies

- Implement 5S (Sort, Set in Order, Shine, Standardize, Sustain)
- Train staff on new layouts, procedures, and inventory systems
- Apply visual signage within the maintenance warehouses to reinforce training
- Introduce visual management tools (labels, signage, Kanban boards)
- Set a protocol for reporting misuse of the maintenance warehouse
- Assign accountability for each discipline that utilizes the maintenance warehouse

Phase IV: Measurement of Improved Process for the Beaufort County Maintenance Warehouses

- Conduct quarterly 5S audits and safety inspections
- Gather feedback from staff and supervisors on new processes
- ***Quarterly engagement with Beaufort County School District's facility team to ensure alignment of warehousing goals***



Great People:
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 workforce. We know that it is essential to focus on employee retention and satisfaction. The Budd Group is committed to retaining a team of Great People.

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 invest in them with job-site education, ongoing training, and development.

The following pages provide an overview of our standard benefit plans. Our company has established these plans to be cost-effective and competitive for our industry; however, we are open to working with you to customize plans to enhance our benefit programs for our associates. This may include grandfathering (continuing benefits) of current staff, paying for holidays, additional vacation, or contributing to associates toward a health or related company-sponsored benefit plan. We welcome the opportunity to discuss this with you and share associated costs based on the plan options selected.

Wage Information
The Budd Group has developed a competitive wage scale based on local employment market information and our experience with several accounts we service in the area.

Low Turnover
The Budd Group is committed to keeping turnover low while consistently exceeding client satisfaction. The Budd Group understands that high turnover rates eventually lead to poor service performance, so we offer our employees several benefits that focus on keeping turnover rates low. In addition to competitive pay rates, these benefits include quality training and recognition for good performance. As a result, The Budd Group's turnover rate is substantially lower than the national average.

The Budd Group is committed to providing the absolute best experience to each of our customers. We understand that this means we must find high-quality employees and do what it takes to retain them. Over the past three years, The Budd Group has maintained an average quarterly turnover rate of 33.3% and has retained an average of 79.5% of our employees quarterly over that same time. Most recently, due to our "Campaign to Retain" program, The Budd Group has lowered quarterly turnover by 12% in an economy where low-wage turnover is rising rapidly.

Proposed Benefits
The following is a list of our current standard benefits for Budd Group employees. These are our proposed benefits that are competitive for our industry. ***For incumbent employees, The Budd Group can initiate these benefits with no waiting period, ensuring they are insured from day one of employment with The Budd Group.***

- **Health, Dental, Vision, Life, Accident, and Disability Insurance Options:** Full-time employees are eligible to participate. Several options and levels of coverage are available, including limited and major medical, dental, vision, accident, life, and disability coverage.



Great People:
Employee Retention and Benefits

- **401(k):** Full-time employees are eligible to participate. After one year of service, all full-time employees can participate in a 401(k) retirement plan.
- **Vacation:** ***In accordance with the RFP requirements, we will provide a minimum of 14 days off, including three sick days, five vacation days, and six holidays: July 4th, Memorial Day, Labor Day, Thanksgiving Day, Christmas Day, and New Year's Day.***
- **Referral Program:** Full-time and part-time employees are eligible. Employees who refer a new employee hired to work at The Budd Group receive a $100 referral fee. The fee is paid after the first 90 days.
- **Holidays:** Holiday pay will apply when we pay all full-time employees their regular scheduled working hours at their normal pay rate.
- **Flexible Spending Account:** Budd Group employees also have access to a flexible spending account (FSA) that allows associates to set aside pre-tax dollars for out-of-pocket medical, dental, vision, and dependent care expenses.
- **Uniforms:** Uniforms will be provided at NO COST to Budd Group employees.

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

We target the following additional areas to minimize turnover as much as possible:

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

The Budd Group understands that other factors influence an employee's job satisfaction. It starts with a simple philosophy: **"Retain your Employees, Retain your Customers."** Some programs are standard with no additional cost, and others are customized and funded by our clients. We will work with you to identify programs that most impact your facilities.

Some of the recognition programs and awards we offer our associates include:

- Employee of the Month and/or Quarter
- Employee Appreciation Lunches
- Perfect Attendance Program
- Monthly Gift Certificates for Achievements
- Quality Assurance Awards
- Safety Awards to actively promote safe working environments
- On the Spot Awards that provide on-the-spot recognition in the form of gift cards to recognize strong performance and provide a thank you



Great People:
Employee Retention Programs

Campaign to Retain Program

Retention is critical to our success and has become an important Key Performance Indicator for The Budd Group. The Budd Group created a program called Campaign to Retain to impact retention positively. The vision for this campaign is to improve our retention rate by giving new employees a warmer touch and acting on the feedback we receive.

Here is how the Campaign works. A member of our team makes weekly calls to every new hire for their first five weeks of employment so that we can improve the employee experience and address any concerns that they might have. As our team members conduct the calls, they will capture the employees' answers in Dayforce, a staffing and recruiting management software that delivers intuitive and comprehensive front-office solutions and online tools to employees. They will contact the Field Services Coordinator and/or Manager with any questions or share the employee's successes and challenges.

We value feedback and want to ensure that our employees' onboarding and training are meaningful. Our Campaign to Retain is already having a successful impact on our organization by improving each new hire's experience!

Employee of the Month Program

As part of our employee retention commitment, our Employee of the Month program recognizes and rewards our associates for their dedication and exceptional service. Below is an overview of how we execute this program with many of our clients; however, we will work with you to customize each retention program to meet your needs and goals best.

All employees who meet the following qualifications/scoring will be entered into a drawing for the Employee of the Month Award.

Qualifications/Scoring for Employee of the Month:



- Attendance

Attendance is one of the primary components of the job. This program recognizes this fact, so any employee who 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: 1.) Inspections and 2.) Complaints and/or compliments from our customers. One complaint or 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 with perfect attendance and inspection scores of 90 or above will be entered into the drawing.



Great People:
Employee Retention Programs

Employees who receive compliments from building personnel will have more entries placed in the drawing, thus increasing their chances of winning. A maximum of up to 10 entries per employee is allowed. One winner will be chosen in each area and given a Visa gift card and a certificate of recognition. It's our policy to work with employees who do not meet quality expectations by offering additional training and coaching opportunities.

Great People Recognition Program

The Budd Group spotlights outstanding employee actions and performances through our Great People Recognition Program. This retention initiative acknowledges employees' commitment, efforts, and exceptional customer service and performance.

The program builds on our existing culture of cooperation, performance, and excellence and reinforces the following:

1.) The importance of our five areas of focus: People, Service, Quality, Growth, and Finance
2.) Our Brand Promise: "Great people delivering great experiences to customers and each other."

Details of this program are as follows:

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

Promise Coin Program

The Promise Coin Program celebrates employees who "Deliver Great Experiences to Customers and Each Other" and allows our employees to pass on recognition for outstanding experiences when they see them. We understand that other factors influence an employee's job satisfaction. We want to create a work environment that's motivating and encouraging by letting our employees know that their colleagues notice when they are doing a great job! Through this program, we encourage our employees to present a coin to an employee when they see them delivering a great experience, which might involve:



- **Going the extra mile to create a great customer or employee experience.**
- **Doing what we say we are going to do and fulfilling our Make It Right Guarantee.**
- **Taking an action to exemplify The Budd Group Values reflected on each coin.**





Great People:
Employee Retention Programs

Level Up Development Program

The Budd Group's ***Level Up Program*** is designed to identify and equip talented individuals to take the next steps in their careers. Through a four-semester program, a frontline employee can develop the skills needed to move to a supervisory or managerial role. This program was designed to help employees feel valued and excited about their work and provide a pathway for growth within the company.

The program consists of twenty weeks of online and instructor-guided education on topics that include:

- Leadership 101
- Transitioning from co-worker to supervisor/manager
- Communication
- Coaching and Motivation
- Customer Relationships
- Employee Relationships
- Emotional Intelligence
- Computer Skills
- Hiring and Interviewing
- Labor Management

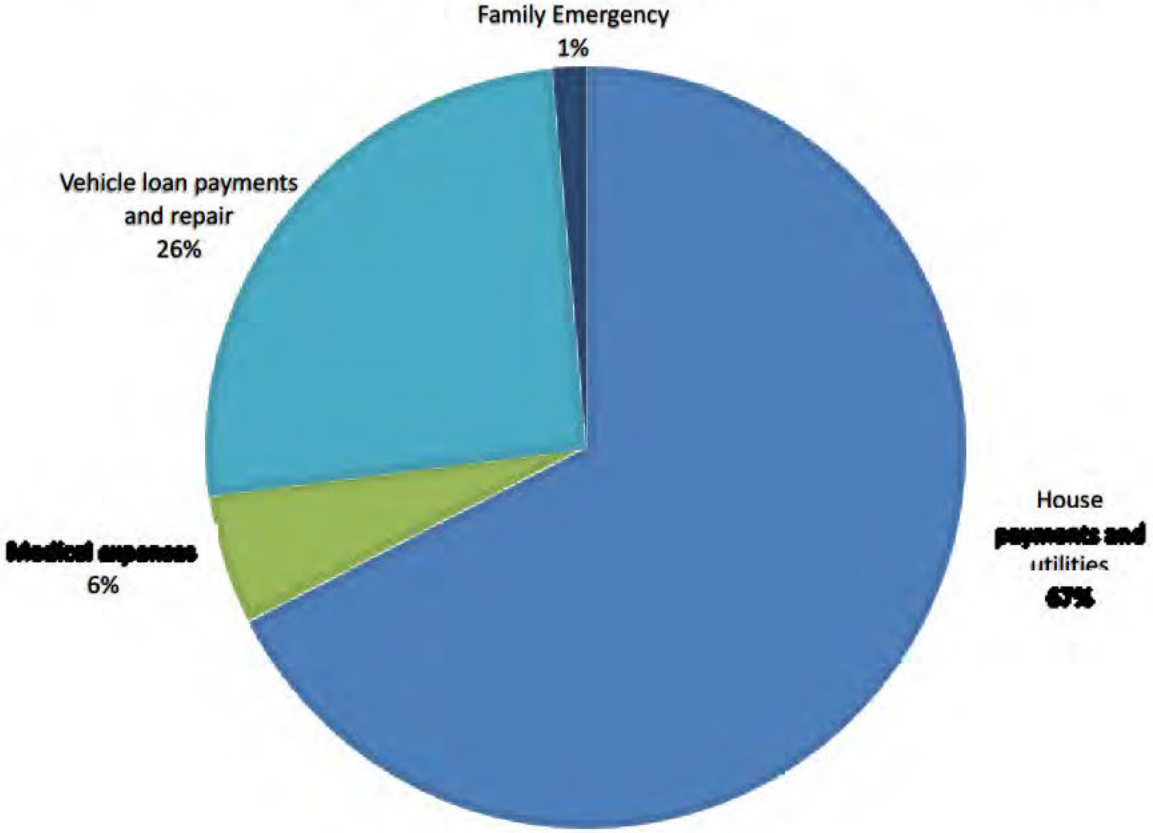


Great People:
Employee Care

The Budd Group strives to develop our employees' personal and professional skills while creating a motivating work environment. Our Human Resources Department partners with our managers and their teams, individual employees, and other vendors to provide programs and processes that drive results and encourage employee empowerment. The Budd Group is an equal opportunity employer and provides employment based on individual capabilities and qualifications without discrimination due to race, color, religion, sex, age, national origin, disability, or veteran status. We believe 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. Sound safety practices and an effective safety program are key to the overall success of our company. To foster this culture, we are committed to safety from top management to all employees.

Employee Assistance Fund

Our most significant source of pride at The Budd Group is the employees who share their time and talent daily. When one of our employees needs assistance, we want to provide help in any way we can. Our Employee Assistance Fund brings that spirit of giving closer to home. The Budd Group Employee Assistance Fund was created to help employees facing financial hardship because of a qualified incident. Since 2014, hundreds of Budd Group employees have received support from the Employee Assistance Fund. This support includes spending over $75,000 on indispensable expenses such as family emergencies, vehicle loan payments and repairs, medical expenses, and housing needs for employees in need. This program is just another way that we show our employees we care.





Smart Service:
Dayforce Wallet On-demand Pay

Retain and engage employees with access to on-demand pay!

The Budd Group is proud to offer our employees access to their earned funds before payday and penalty-free! The Dayforce Wallet application and accompanying Dayforce card enable employees to make any day payday by accessing their wages on-demand. The Dayforce Wallet app allows employees to view balance and transaction information, transfer funds to other accounts, and find ATM locations for cash withdrawals in a single place. Unlike a mobile banking application, employees can access their on-demand funds immediately upon request, rather than having to wait 1-3 business days for the transaction to complete.



With Dayforce Wallet, our employees can decide when they get paid so they can focus on the task at hand!

Dayforce Wallet has directly impacted The Budd Group's recruiting and retention efforts. Since implementing Dayforce Wallet, our 90-day attrition rate has decreased by 12%, and our time to hire has decreased by 31%.

Since 2021, The Budd Group has funded over $43 Million in on-demand payments with more than 5,200 participants!



Smart Service:
Training Program

4.0.1.8 TRAINING PROGRAM FOR MANAGEMENT & HOURLY EMPLOYEES:

- What is the name of the training program(s) your company uses to train all employees?

  The Budd Group partners with Interplay Learning, a leader in immersive, simulation-based training, for its technology-driven approach to trades education.

- If the training program(s) is/are an "in house" training program(s), a copy of the program(s) must be attached to this RFP.

  Please refer to the following Training Program document and the enclosed Interplay Learning Facility Maintenance Training Solution document for details on our comprehensive training program tailored specifically for the maintenance roles outlined in the facilities maintenance management services contract.



Smart Service:
Training Program

Maintenance Training and Development at The Budd Group

At The Budd Group, we recognize that our maintenance personnel's expertise and continuous development are fundamental to ensuring our clients' facilities' efficient, safe, and reliable operation. Our comprehensive facilities management solutions are supported by a robust and innovative maintenance training and development program delivered through ***Budd University***, our centralized learning management system. This program leverages the cutting-edge capabilities of ***Interplay Learning***, accessible directly via the Budd University platform, to provide our team members with the essential knowledge, practical skills, and industry-recognized credentials needed to excel in their roles and advance their careers.

This comprehensive program offers structured onboarding and ongoing skill development for all maintenance staff, reinforcing The Budd Group's unwavering commitment to safety, continuous employee growth, and delivering exceptional service that consistently exceeds client expectations. Our training initiatives are meticulously designed to meet and often exceed the standards and expectations of leading industry organizations, including ***NATE, OSHA, and the Environmental Protection Agency (EPA),*** ensuring compliance and promoting best practices.

Program Structure and Learning Pathways

All maintenance employees at The Budd Group engage in a structured training program facilitated through our Budd University Learning platform. Recognizing our team members' diverse skill levels and prior experience, ***the training assigned to each employee is personalized based on thorough skill assessments,*** ensuring ***targeted*** and ***effective*** development. Our program encompasses two primary learning pathways:

- **Path 1: Customized Foundational Training:** All prospective maintenance ***employees complete comprehensive skill assessments during the hiring process.*** The valuable insights gained from these assessments inform our recruiters and serve as the foundation for developing customized training curricula for each new Budd Group team member. Upon completing their assigned training modules and a final competency assessment, employees are awarded a professional certificate, recognizing their achievement and mastery of the subject matter.

- **Path 2: Continuing Education and Skill Enhancement:** For employees who already possess relevant industry licenses and certifications, we offer access to an extensive library of maintenance-related training courses through Interplay Learning. These courses provide valuable Continuing Education Unit (CEU) credits, enabling our experienced technicians to stay current with the latest industry advancements, regulations, and best practices, while maintaining their professional credentials.



Smart Service:
Training Program

The Interplay SkillMill Platform: An Immersive Learning Experience

Integrating the Interplay SkillMill Platform within Budd University significantly enhances our maintenance training. This state-of-the-art platform offers a dynamic and engaging learning environment characterized by:

- **Flexible Learning Modalities:** Comprehensive online courses complemented by immersive Virtual Reality (VR) training simulations for hands-on practice in a safe and controlled environment.
- **Job-Ready Certification Programs:** Focused curricula culminating in Job-Ready Certificates, validating specific skill sets and enhancing employability.
- **Industry-Recognized Credentials:** Opportunities to earn valuable industry certifications, including OSHA 10 Construction Safety Training, EPA 608 refrigerant handling certification, and HVAC Excellence certifications, demonstrating a commitment to professional standards.
- **Interactive Career Exploration:** Engaging interactive 3D simulations and VR learning experiences that allow employees to explore different aspects of maintenance and develop a deeper understanding of complex systems.
- **Personalized and Hands-On Learning:** Features like one-on-one virtual coaching and unlimited hands-on practice within simulations to reinforce learning and build confidence.
- **AI-Powered Support:** Intelligent AI Tutor guidance provides personalized feedback and support throughout the learning process, optimizing comprehension and retention.
- **Accelerated and Streamlined Learning:** Efficiently designed courses that deliver essential information and skills in an engaging and time-effective manner.
- **Expert-Led Content:** High-quality video and simulation courses developed and delivered by industry experts, ensuring accuracy and relevance.
- **Performance Tracking and Insights:** Job-readiness insights and tracking tools allow employees and managers to monitor progress and identify areas for further development.
- **Safety-Focused Training:** Realistic simulations and videos emphasizing safe work practices and hazard recognition.
- **Comprehensive Competency Assessments:** Rigorous assessments to evaluate knowledge and skills, ensuring proficiency and validating learning outcomes.
- **Efficient Training Administration:** Management tools that streamline the assignment, tracking, and reporting of training activities.
- **Mobile Accessibility:** Convenient mobile access to training materials, allowing for learning anytime, anywhere.

Job-Ready Certificate Programs Offered (Inclusive of OSHA 10 Construction Safety Training):

- HVAC (78 hours)
- Plumbing (75 hours)
- Electrical (45 hours)
- Multi-Family Maintenance (80 hours)
- Building Maintenance (72 hours)
- Appliances (71 hours)
- Clean Energy (41 hours)
- Solar (71 hours)



Smart Service:
Training Program

Comprehensive Training Manuals

All relevant maintenance training courses accessed through our Interplay Learning system on the Budd University platform are accompanied by a comprehensive ***training course manual to further support the learning process***. This valuable resource provides detailed information, procedures, and reference materials to reinforce online and simulation-based learning. ***Our comprehensive training manual exceeds 500 pages. We have included a representative selection of excerpts from various sections for your review.***

Orientation and Ongoing Safety Training: Our Priority

At The Budd Group, the safety of our employees is paramount. Therefore, all new hires are required to participate in a structured safety training program during their onboarding. This program is designed with two key objectives:

- **Comprehensive Onboarding Safety Training:** To provide new employees with the essential knowledge and procedures to perform their duties safely from their first day.
- **Monthly Safety Reinforcement:** To reinforce our company's unwavering commitment to safety by assigning monthly safety training modules to all technicians. These sessions are intended to continuously reinforce critical safety concepts and maintain a strong safety-conscious culture throughout the organization.

Orientation Training Curriculum for All New Hires:

Date	Maintenance
First day(s) of work / Orientation period	Customer Services
	Hazardous Communication
	Bloodborne Pathogens
	Personal Protective Equipment
	Lock out / Tag out
	Confined Space
	Ladder Safety



Smart Service:
Training Program

Monthly Safety Reinforcement Training Curriculum:

Month	Maintenance
January	Electrical Safety
February	PPE / Lock out – Tag out
March	Hazardous Communication
April	Ladder Safety
May	Bloodborne Pathogens
June	Fire Extinguisher
July	Confined Space
August	Customer Service / Communication
September	Safe Driving
October	Asbestos Awareness
November	Hand and Power Tools
December	Holiday Season – optional session

Ultimately, The Budd Group's investment in maintenance training, delivered through Budd University and the innovative Interplay SkillMill, reflects our core commitment to empowering our team. By providing personalized pathways, cutting-edge learning tools, and opportunities for professional advancement and safety certification, we ensure our maintenance personnel are highly skilled and prepared to exceed client expectations and consistently uphold the highest service standards.



Smart Service:
Interplay Learning – Facility Maintenance Training Solution

Interplay Learning
Better careers, better lives.

Interplay Learning is a leading provider of immersive, simulation-based training solutions for the skilled trades. Founded in 2016 and headquartered in Austin, Texas, the company delivers scalable, hands-on digital learning experiences across HVAC, plumbing, electrical, solar, and facilities maintenance industries.

The Budd Group partners with Interplay Learning for its innovative, technology-driven approach to trades education. This collaboration enables us to deliver a comprehensive maintenance program that helps address the skilled labor shortage and enhances the quality of service for our customers.

Key Offerings Overview:

- **SkillMill Platform**: Interplay's flagship platform offers over 300 hours of training content, including short video lessons, 3D simulations, knowledge checks, and assessments. This approach enables learners to acquire job-ready skills in weeks rather than years.
- **Virtual Reality & 3D Simulations**: The company leverages advanced VR and 3D technologies to recreate real-world scenarios, providing learners a safe and engaging environment to practice and hone their skills.
- **AI-Powered Assistant – SAM**: Interplay introduced SAM (Skill Advisor and Mentor), an AI-driven assistant offering trainees real-time, conversational guidance. SAM utilizes a large language model to provide instant support, enhancing the learning experience.
- **Certifications and Accreditations**: Interplay's training programs prepare learners for industry-recognized certifications, including OSHA 10, EPA 608, and NATE, ensuring compliance with safety and technical standards.

Interplay Learning benefits our customers by enhancing workforce readiness, improving service quality, and reducing training time and costs.

Benefits to BCSD:

- **Higher Service Quality:** Trained technicians are more competent, accurate, and efficient, resulting in better service outcomes and fewer callbacks.
- **Faster Response Times:** Well-trained staff can handle more complex issues independently, improving first-time fix rates and reducing delays.
- **Increased Trust & Satisfaction:** Certified, knowledgeable employees build customer confidence and contribute to long-term client relationships.
- **Alignment with Industry Standards:** Customers benefit from staff who are up-to-date with best practices, regulations, and new technologies (e.g., EPA 608, NATE, OSHA).



Smart Service:
Interplay Learning – Facility Maintenance Training Solution

Utilizing Interplay Learning affords The Budd Group with:

- **Faster Onboarding & Upskilling**
  Interactive, self-paced training enables new hires and existing employees to quickly build core competencies, reducing the time to productivity.
- **Standardized Training Across Teams**
  Their SkillMill platform ensures consistent training delivery across all locations, reducing variability in service quality.
- **Reduced Safety Incidents & Liability**
  Simulation-based practice and OSHA-aligned modules help reinforce safety protocols, lowering accident rates.
- **Lower Turnover & Higher Engagement**
  Offering career development and certifications through Interplay can boost employee retention and morale.
- **Cost Savings**
  Digital training reduces the need for expensive in-person sessions, travel, and lost productivity during training periods.





HVAC

60 Courses



Commercial HVAC

22 Courses



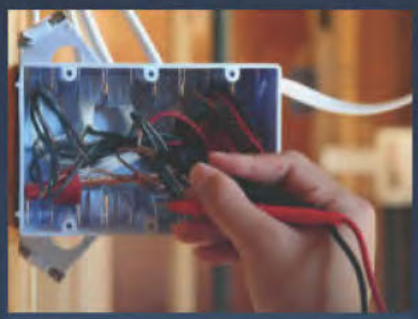
Solar

12 Courses



Plumbing

32 Courses



Electrical

25 Courses



Multi-Family Facility Maintenance

100 Courses







Course Catalog

SkillMill is the world's first online, on-demand skilled trades training catalog featuring VR and 3D simulations. Access courses and 3D simulations on Desktop, Laptop, Tablet, or VR.

RELEASED 9/30/22	Basic Solo Achieve Team Enterprise	Commercial HVAC	HVAC501	**Chiller Unit Components** 7 Lessons, 1 Hour	Beginner	Video	English Spanish

COURSE: **HVAC501**

Chiller Unit Components

7 Lessons **1 Hour** **VIDEO BASED**

IACET
0.1 IACET CEU

Learn what the major components of a chiller unit are and how each one fits into a pressure enthalpy chart, on both the high and low side of the system.

LESSONS:

Introduction
Chapter 1: Pressure Enthalpy Chart (PH Chart)
Chapter 2: Compressor
Chapter 3: Condenser
Chapter 4: Metering Device
Chapter 5: Evaporator
Final Knowledge Check

RELEASED 4/25/19	Basic Industrial Team Industrial Enterprise Solo Achieve Team Enterprise	HVAC Facilities Maintenance Multi-Family Facility Maintenance Hospitality	HVAC111	**Compressors** 8 Lessons, 1 Hour	Beginner	Video	IACET NATE	English Spanish

COURSE: **HVAC111**

Compressors

8 Lessons **1 Hour** **VIDEO BASED**

The Compressor course zeros in on another fundamental component of an HVAC system, the compressor. Learn its basic functionalities: from its compression and intake strokes, to the maintenance of its valves. Within this course you will discover the many types of compressors, with a focus on reciprocating, scroll, hermetic and semi-hermetic. You will learn how to calculate compression ratios and their significance on a system. Finally, you'll realize the reality of lubrication, why it is so important and maintenance methods.

IACET
0.1 IACET CEU

NATE
2 hrs.- Any Specialty

LESSONS:

Chapter 1: Reciprocating Compressor Operation
Chapter 2: Hermetic and Semi-Hermetic Compressor
Chapter 3: Air-Cooled Compressor and Suction Service Valve
Chapter 4: Discharge Service Valve
Chapter 5: Compression Ratio
Chapter 6: More Compressors
Final Knowledge Check
Course Feedback

RELEASED 4/25/18	Basic Solo Achieve Team Enterprise	Solar	SOL205	**Electrical Commissioning** 5 Lessons, 2 Hours	Intermediate	3D/Sim	IACET NABCEP	English Spanish

COURSE: **SOL205**

Electrical Commissioning

5 Lessons **2 Hours** **3D/SIM BASED**

Note: This course is not VR-enabled.

In Electrical Commissioning, you will perform some critical final electrical checks and then get to turn your system on! You use a digital multimeter (DMM) to check for continuity and confirm the identity of the two pairs of wires coming from the array into the inverter. You also check for proper polarity and safety voltage. Finally, you finish your electrical tests using a megohmmeter to confirm that none of your array conductors have compromised insulation that could lead to a ground fault later on. Then you proceed to connect the array conductors to their terminals in the inverter dc switch, and then systematically energize the AC components, beginning with removal of the lockout device on the solar breaker and ending with turning on the inverter.

IACET
- IACET CEU

NABCEP
NABCEP PVIP 2 hours
NABCEP PVA 2 hours
NABCEP PVCMS 2 hours

LESSONS:

Introduction
- Course Overview Video
- How To Use The Multimeter
- All About the Megohmmeter

Chapter 1: Before System is Energized
- Lesson 1: Continuity and Identity of DC Circuits
- Lesson 2: Verify DC Conductor Insulation Resistance
- Lesson 3: Chapter Knowledge Check
- Lesson 4: String Polarity and Voltage

Chapter 2: Energize System
- Lesson 1: Connect DC Circuit
- Lesson 2: Energize AC Components
- Lesson 3: Compare Output to Expected
- Lesson 4: Chapter Knowledge Check

Course Final Assessment

Chapter 3: Resources

RELEASED 4/26/19	Basic Industrial Team Industrial Enterprise Solo Achieve Team Enterprise	Safety and Compliance Facilities Maintenance HVAC Commercial HVAC Plumbing Multi-Family Facility Maintenance Hospitality	HVAC107	**HVAC Safety Basics** 8 Lessons, 1 Hour	Beginner	Video	IACET NATE	English Spanish

COURSE: **HVAC107**

HVAC Safety Basics

8 Lessons **1 Hour** **VIDEO BASED**

Always work with a safety first mindset! In the HVAC field you will encounter high voltage electricity, combustible gases, metal fabrication, and ladders. This course covers HVAC best practices and procedures on fire safety, personal protective equipment, ladder usage, electrical circuits, and shock risk, as well as, Lockout/Tagout procedures.

IACET
0.1 IACET CEU

NATE
NATE 1 CEU hr-Any Specialty

LESSONS:

Introduction
Chapter 1: General Safety, Part 1
Chapter 2: General Safety, Part 2
Chapter 3: Compressed Gas Safety
Chapter 4: Electrical Safety, Part 1
User Review
Chapter 5: Electrical Safety, Part 2
Final Knowledge Check

RELEASED 12/11/20	Basic Industrial Team Industrial Enterprise Solo Achieve Team Enterprise	Safety and Compliance Facilities Maintenance Plumbing Multi-Family Facility Maintenance Hospitality Appliances	PLMB118	**Plumbing Safety** 10 Lessons, 2 Hours	Beginner	Video	English Spanish

COURSE: **PLMB118**

Plumbing Safety

10 Lessons **2 Hours** **VIDEO BASED**

IACET
0.2 IACET CEU

Knowing safety practices to follow is essential for every plumber. This course takes you through safety practices such as infection control, glue safety and drain safety. You'll also learn how to implement hand and power tools required for various plumbing tasks in different environments. In addition to that, you will learn how to identify and use the appropriate PPE in required areas.

LESSONS:

Introduction
Chapter 1: Infection Control
Chapter 2: Glue Fumes
Chapter 3: Tool Safety
- Lesson 1: Wrench Safety
- Lesson 2: Power Tools
- Lesson 3: Pipe Threading

Chapter 4: Two Person Work
Chapter 5: Fire Watch
Chapter 6: Excavations
Chapter 7: Drain Cleaning
Chapter 8: Water Heater Safety
Final Knowledge Check

NEW 2/4/25	Industrial Team Industrial Enterprise Solo Achieve Team Enterprise	Facilities Maintenance Electrical	ELEC135	**Receptacle Replacement** 7 Lessons, 2 Hours	Beginner	3D/Sim	English

COURSE: **ELEC135**

Receptacle Replacement

7 Lessons **2 Hours** **3D/SIM BASED**

IACET
0.2 IACET CEU

Have you ever flipped the switch on a device only to find that the outlet isn't working? Whether you're upgrading old outlets or fixing a malfunction, understanding how to properly replace a receptacle is a must-have skill for any commercial setting. In this video and simulation-based course, you'll not only identify the wiring and slot configuration of receptacles, but also be able to differentiate between different receptacle types and when to use them. Next, you'll learn about the common tools you'll need to be able to replace a receptacle, as well as describe the various safety precautions and procedures needed when replacing a receptacle. Finally, you'll demonstrate in a simulation how to safely and properly replace a receptacle, while also following live-dead-live protocols to ensure your safety throughout the replacement.

LESSONS:

Introduction
Chapter 1: Overview
Chapter 2: Tools and Safety
Chapter 3: Replacing a Receptacle
Challenge Mode
Lesson 1: Challenge Scenarios
Chapter 4: Wrap-Up
Final Knowledge Check

RELEASED 8/24/21	Basic Solo Achieve Team Enterprise	Appliances Multi-Family Facility Maintenance Hospitality	APPL205	**Refrigerator Troubleshooting** 10 Lessons, 2 Hours	Advanced	3D/Sim	English Spanish

COURSE: **APPL205**

Refrigerator Troubleshooting

10 Lessons **2 Hours** **3D/SIM BASED**

IACET
0.2 IACET CEU

This simulation based course walks you through step by step of how to diagnose and repair 13 common refrigerator problems that you may encounter on the job. You will work through various cases of malfunctioning refrigerators. This is a fun, interactive and effective way to learn how to fix a refrigerator.

LESSONS:

Introduction
Chapter 1: Sealed System Issue
Chapter 2: Airflow Issues
- Lesson 1: Faulty Evaporator Fan
- Lesson 2: Blocked Return/Supply Duct

Chapter 3: Defrost System Issues
- Lesson 1: Defrost Timer Stuck Closed
- Lesson 2: Defrost Timer Stuck Open
- Lesson 3: Faulty Heater
- Lesson 4: Faulty Defrost Thermostat

Chapter 4: Compressor Issues
- Lesson 1: Dirty Coils
- Lesson 2: Faulty Condenser Fan
- Lesson 3: Faulty Compressor Start Device

Chapter 5: Faulty Cold Control
Chapter 6: Ice Maker Issues
- Lesson 1: Faulty Ice Maker
- Lesson 2: Faulty Ice Maker Water Valve

Chapter 7: Challenge Scenarios
- Lesson 1: Challenge Scenarios

Assessment Scenarios
- Lesson 1: Assessment Scenarios

Final Knowledge Check

Smart Service:
Quality Control

4.0.1.9 FACILITIES MAINTENANCE SERVICES QUALITY CONTROL:

What system does your company use to measure the quality of your facilities maintenance services? Please describe here or attach a copy of your company's documents describing your system.

The Budd Group's proprietary quality control program, Total Quality Management, serves as a central hub housing all quality control reporting, inspection reports, and performance metrics, providing a comprehensive overview of service delivery and ensuring consistent adherence to contract standards.

Note: Attach additional pages, if needed.

- If your company uses a software quality control system, please name the system:
  The Budd Group's Total Quality Management (TQM) System.



Smart Service:
Quality Control

Beaufort County School District seeks a program that can ***ensure quality assurance*** and ***contract compliance.***

The success of The Budd Group's operational teams is founded upon developing a comprehensive suite of standard operating procedures and establishing performance expectations grounded in quantifiable outcomes. Our company culture, characterized by the measurement and management of performance, ensures adherence to our Standard Operating Procedures, thereby facilitating the replication of successful performance across our academic clientele. The Budd Group's proprietary quality control program, **Total Quality Management**, serves as a central hub housing all quality control reporting, inspection reports, and **performance metrics.**

Our primary operating principle can be best summed up by our founder, Richard Budd, who said, ***"Do what you say you're going to do."*** This simple statement provides a powerful underlying principle at the heart of our commitment to our customers.

In pursuit of continuous improvement, we consistently evaluate our performance through audits and inspections. Our findings underscore the necessity of measuring performance and adapting our programs to evolve and maintain alignment with our clients' expectations.
The Budd Group's Quality Assurance Program is multifaceted and structured to capture measurable results through ***daily, weekly, monthly, quarterly, and annual activities.***

Daily Activities

Rounds: Management will conduct daily rounds to proactively identify and address maintenance issues before they are reported. Our team is expected to generate most corrective work orders independently.

Work Orders: Brightly's Asset Essentials and SchoolDude's Maintenance Direct can automatically send satisfaction surveys to those who submitted work orders once the work is finished. The Budd Group advises using a brief, three-question survey for requestors to complete quickly and easily. Feedback gathered from these surveys offers valuable insights from the recipients of our services. A sample of the recommended survey can be reviewed on the following page.

The Budd Group references Brightly because we know this is what Beaufort County School District uses today. We are prepared to use any CMMS, and many of The Budd Group managers have experience working with other CMMS Systems.

Well-defined Standard Operating Procedures and Key Performance Indicators create an environment where successful results can be replicated.



Smart Service:
Quality Control

Work Order - CMMS Satisfaction Survey

Requestor's perception of the quality of services provided

* Indicates required question

Email *

Your email

Requestor's Name *

Your answer

School Name *

Your answer

Please rate the timeliness of the repairs (5 beir

1 2 3

Please rate the quality of the repairs completed (5 being the best) *

1 2 3 4 5

Please rate the professionalism of the technician (5 being the best). *

1 2 3 4 5

Thank you for your time!

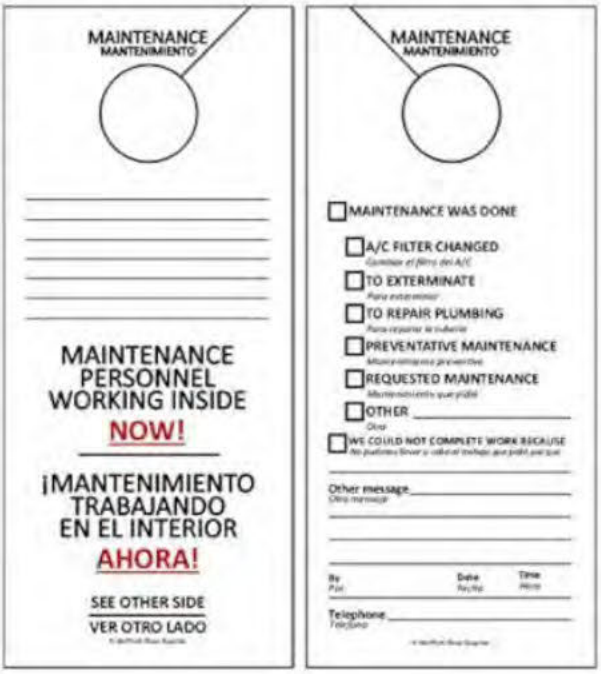
Please share any additional thoughts you may have that would help us improve our services.

Your answer



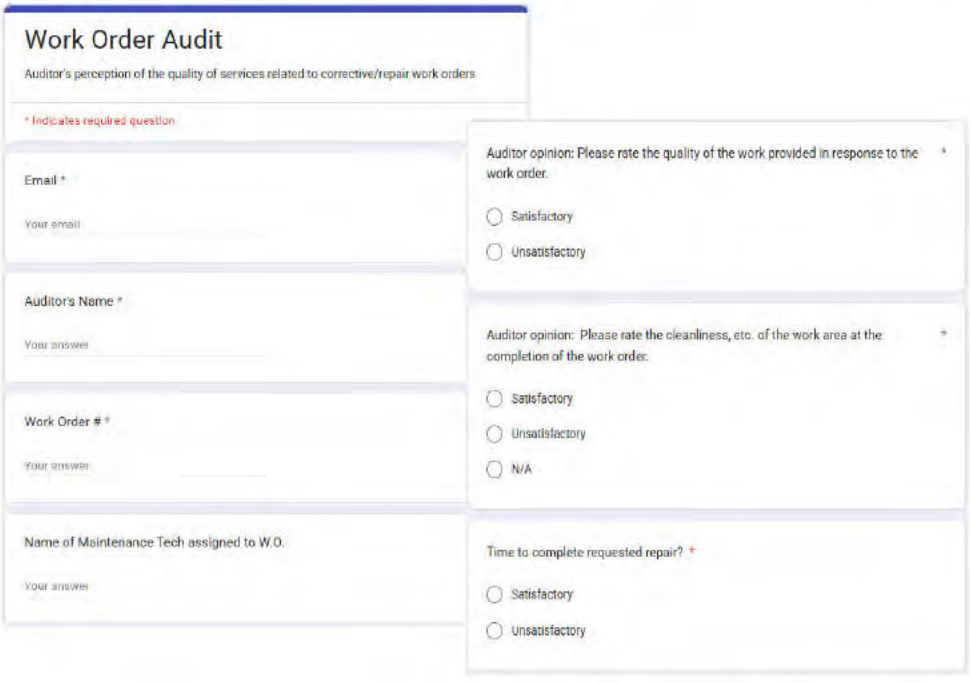
Smart Service:
Quality Control

To ensure room residents are aware of maintenance activities, we will use door stickers, hangers, and tent cards to share updates, announce service interruptions, and signal when work is finished. ***This provides a clear and noticeable way to communicate directly*** with people, helping to reduce disruption and keep them informed proactively.



Weekly Activities

Work Order Audits: The management team randomly audits work orders. The team must investigate the work site for quality and discuss satisfaction with the work order requestor whenever possible. Work Order Audits are completed on a tablet and uploaded in real time to ensure quick and accurate reporting. A copy of the Work Order Audit can be reviewed below.



Work Order Audit

Auditor's perception of the quality of services related to corrective/repair work orders

* Indicates required question

Email *

Your email

Auditor's Name *

Your answer

Work Order # *

Your answer

Name of Maintenance Tech assigned to W.O.

Your answer

Auditor opinion: Please rate the quality of the work provided in response to the work order. *

- Satisfactory
- Unsatisfactory

Auditor opinion: Please rate the cleanliness, etc. of the work area at the completion of the work order. *

- Satisfactory
- Unsatisfactory
- N/A

Time to complete requested repair? *

- Satisfactory
- Unsatisfactory



Smart Service:
Quality Control

Work Order Completion Reports: Maintenance Managers and supervisors review the dashboard and work order completion reports weekly, often daily, via SchoolDude, the district's Computerized Maintenance Management System (CMMS). These reports provide the information our front-line supervisors require to manage work order completion timeliness proactively. ***The management staff will inspect closed work orders on a routine basis and furnish the District Facilities Support Manager with an electronic copy of the inspection***.

Meeting with District: ***The Contractor and the District Facilities Support Manager will review operational issues and year-to-date customer service results weekly.***

Monthly Activities

Monthly Reporting: On the third workday of the month, the Director of Maintenance will provide the District with a monthly report that complies with Section 3.6.7 of the RFP. The following sections describe several of the components of the Monthly Report.

Employee Roster Reporting: Each month, The Budd Group will provide the District with a report showing a roster of employees by trade and the hours worked. ***Please see Section 6 to review our information about our Human Capital Management System, which allows us to track all of this information easily.***

Energy Management Reporting: Brightly's Energy Management module provides simple tools to create configurable views, reports, charts, and graphs on use/cost, carbon emissions, budget data, utility billing information, avoided costs, and more. Our team will access the district's energy data to improve efficiency via the detailed reports. These reports will help identify energy conservation measures, compare utility usage between buildings, and communicate resource stewardship to stakeholders within the community.





Smart Service:
Quality Control

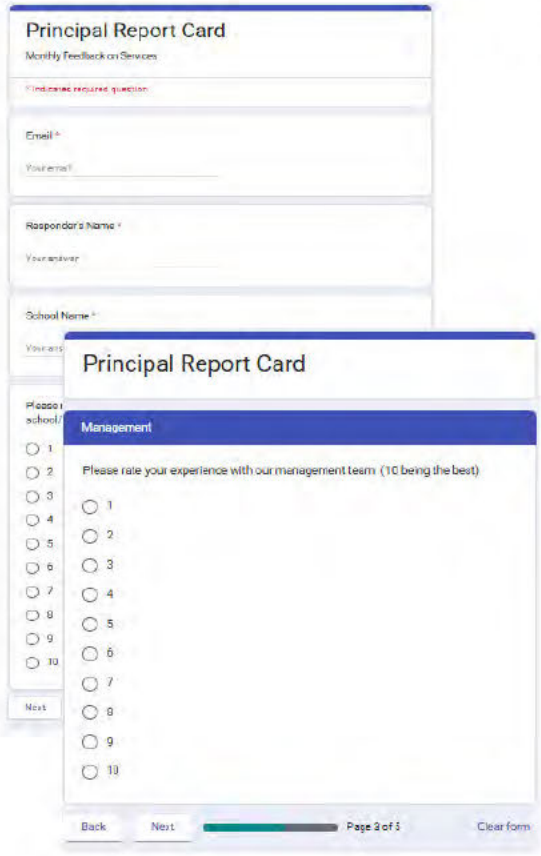
Customer Satisfaction Surveys: To ensure we meet customer expectations, principals and/or their designees are asked to complete a "Monthly Report Card". This feedback method helps our team understand our customers' perception of the quality of our services. We are eager to understand our customers' expectations and thoughts on our service delivery and quality so that we can continue to improve. Each month of the academic year, the results will be consolidated, analyzed, and presented to our client liaison (*transparency is part of the BUDD GROUP culture)*. The results and trends are recorded, and action plans are developed immediately to address any opportunities resulting from customer feedback. We feel it is critical to create specific and measurable action plans to ensure fewer undesirable results are not repeated.

The Monthly Report card has been designed to be quick and easy to complete. We know time is valuable, and principals do not have enough time as it is. The report card is a two-question survey. For those who are satisfied, it is anticipated that the *Monthly Report Card can be completed in 15-30 seconds.*

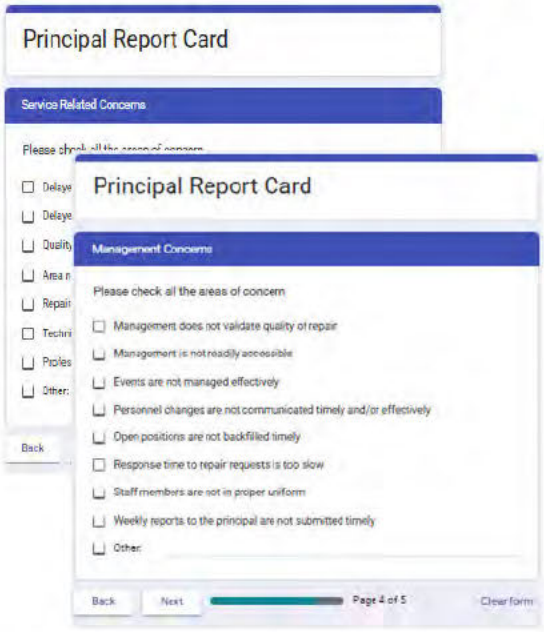
The illustration below is a sample "Monthly Report Card." The questions can be easily modified to suit the school district's needs. Principals who rate the questions below an eight will be prompted to answer an additional question to seek clarification.



Smart Service:
Quality Control



Responders who score below an 8 will be required to answer the following questions. Others will bypass this question.



Responders who score lower than an eight (8) will be subject to answering the following questions. Others will bypass this question.

Team Meetings: The Budd Group is ***committed to maintaining all equipment at APPA Level 3***. We will implement a comprehensive program with thorough training for all maintenance management and staff personnel on APPA Level 3 standards to achieve this. This training is consistently provided to any replacement personnel to maintain continuity. ***Ongoing compliance is ensured through monthly meetings with staff***, where adherence to APPA Level 3 criteria is reinforced. District Operations Staff will receive written notification of these meetings, including a list of The Budd Group staff in attendance.

Work Order Statistical Reports: Computer-aided Maintenance Management System (CMMS) programs provide various reports that measure the maintenance team's performance. These Work Order reports are generated and analyzed regularly. Some of the more popular reports include:

- Work Order Aging
- Preventive Maintenance Work Order Completion
- Work Orders Completed by Employee
- Work Order Hours by building
- Work Order Cost by building
- Comparison of Unscheduled versus Scheduled work*
- ***Response Time Standards***

Emergency requests, urgent requests, and routine requests



Smart Service:
Quality Control

Quarterly Activities

Quarterly Business Review: At the end of each quarter, the Beaufort County Maintenance team and The Budd Group team will meet to review the results from the prior quarter and discuss objectives for the following quarter(s). These meetings help our team ensure that we are aligned with our clients' short—and long-range goals. A quarterly report of accomplishments will be prepared and reviewed.

Annual Activities

Quality Enhancement Plans (QEP): The development of Quality Enhancement Plans is a best practice that defines goals and objectives that are directly aligned with client expectations and foster a culture of continuous improvement.

The self-assessment plans are intended to define clear objectives and measurable outcomes that support customer satisfaction and the academic mission. Additionally, the self-assessment plans are circular by design and support a culture of continuous improvement (measure, analyze, adjust = improvement). The Self-assessment also reviews the established KPIs and redefines the measurable if needed.

> The self-assessment process is consistent with the continual improvement program requirements of accreditation bodies nationwide.

The Self-assessment process typically comprises a two-step process:

1. A department performance plan is developed at the beginning of each academic year. This plan must include the following two components to be effective:
   a. Identify KPIs that are directly associated with customer satisfaction.
   b. Define the measurement tools that will be used to capture the performance results.
2. At the end of the quarter, analyze results and adjust the plan accordingly.



Clients actively engage with our team to develop Key Performance Indicators (KPIs) that measure The Budd Group's performance. Clearly defined KPIs ensure that objectives align with outcomes, directly supporting our clients' success.

Key Performance Indicator (KPI) = a measurable result that has a direct impact on supporting the success of an institutional/department mission



Smart Service:
Quality Control

Sample <u>Quality Enhancement Plan</u> illustrated below
(Sample goals, objectives, and data source provided to illustrate format)

Institutional Mission	Department Mission	Functional Areas and Associated Goals	Beginning of Year Objectives by Functional Areas	Data Source	End of Year Results	Action Plan
Client	Facilities Management at _____ strives to provide an inviting and safe physical environment conducive to learning, work, and quality of life.	Customers will be satisfied with the services provided by our **maintenance** team.	Satisfaction Scores for maintenance operations will exceed 85%	Satisfaction surveys		
			Corrective Work Order will be completed within 48 hours of receipt, 95% of the time.	CMMS Software		
			95% of PM will be completed during the review cycle	CMMS Software		
		Corporate leadership and _____ are satisfied with the **administrative** efforts of our management team.	95% of the scheduled training will be completed	In-service Records		
			Provide an accident-free workplace.	OSHA 300 Log		
			Management of the Facility Condition Assessment (FCA)	Completion of the annual update and annual review with the client		



Smart Service:
Quality Control

Random / Unannounced Activities *(performed a minimum of twice per year)*

Safety Audits: Our Regional Safety Managers conduct audits at our facilities randomly. Audits include a comprehensive review of the safety training, record keeping, work environment, compliance-related issues, and required postings.



Operation Audits: Our Regional and Corporate Operations Managers randomly conduct audits at our facilities. Audits include a comprehensive review of the Budd Group Standard Operating Procedures implementation.



Smart Service:
Brightly Computerized Maintenance Management System

4.0.1.10 FACILITIES MAINTENANCE SERVICES MANAGEMENT SYSTEM:

Does your company use software to manage your maintenance services?

✓ Yes _____ No

If yes, what software does your company use to manage your maintenance services?

The Budd Group operates Brightly at most sites, where we perform maintenance services. Our team of facilities professionals has experience operating many CMMS packages and is fully prepared to assist Beaufort County Schools in selecting their new CMMS and ensuring the greatest value is extracted from the selected system.

SchoolDude (Asset Essentials) by Brightly Overview

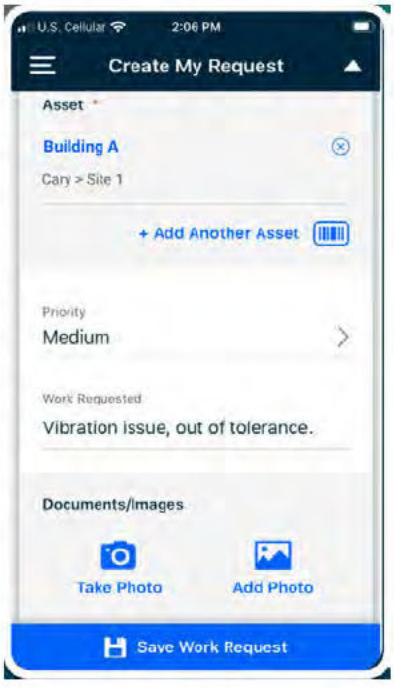
The Budd Group operates Brightly's computerized maintenance management system (CMMS) at most sites where we provide maintenance services. Our Subject Matter Experts have extensive experience operating SchoolDude's Maintenance Connection software. ***Our team is also prepared to assist in upgrading Maintenance Connection to the latest version of Brightly's CMMS, "Asset Essential".*** The back-of-the-house user experience of Maintenance Connection and Asset Essentials is very similar, and our team is prepared to extract the greatest value from the district's investment in the technology.

It is important to note that although the Budd Group has selected Brightly as our strategic partner for our CMMS needs, we understand that not all our clients share our preferences. Our team of facilities professionals has extensive experience operating various CMMS packages and is fully prepared to assist Beaufort County School District in selecting its new CMMS, ensuring the greatest value is extracted from the chosen system.

Brightly's MaintenanceConnection

Based on the RFP specifications issued by Beaufort County School District, The Budd Group will be charged with extracting the most valuable information from SchoolDude, the district's CMMS.

Brightly has stated that their SchoolDude app was discontinued in 2015 and is no longer supported or updated. While users with the app installed can still use it, Brightly Software will not provide any further changes or issue resolutions. The Budd Group encourages clients to consider a thoughtful transition to the current Brightly platform. This will help ensure access to supported and updated solutions, allowing them to take advantage of the latest features, enhanced security measures, and continuous customer support.





Smart Service:
Brightly Computerized Maintenance Management System

This proactive approach will mitigate potential disruptions or inefficiencies associated with relying on an unsupported application. The Budd Group's strategic partnership may yield savings if the school district desires this transition.

Asset Essentials: "Asset Essentials" is a work dispatching and tracking system that includes preventive maintenance activities. This module facilitates task assignment, tracks assignment progress until completion, and serves as a repository of all information related to the upkeep of the facility's assets. An *effective preventive maintenance program should align with Manufacturer Recommendations to protect warranties and the life cycle of assets.*

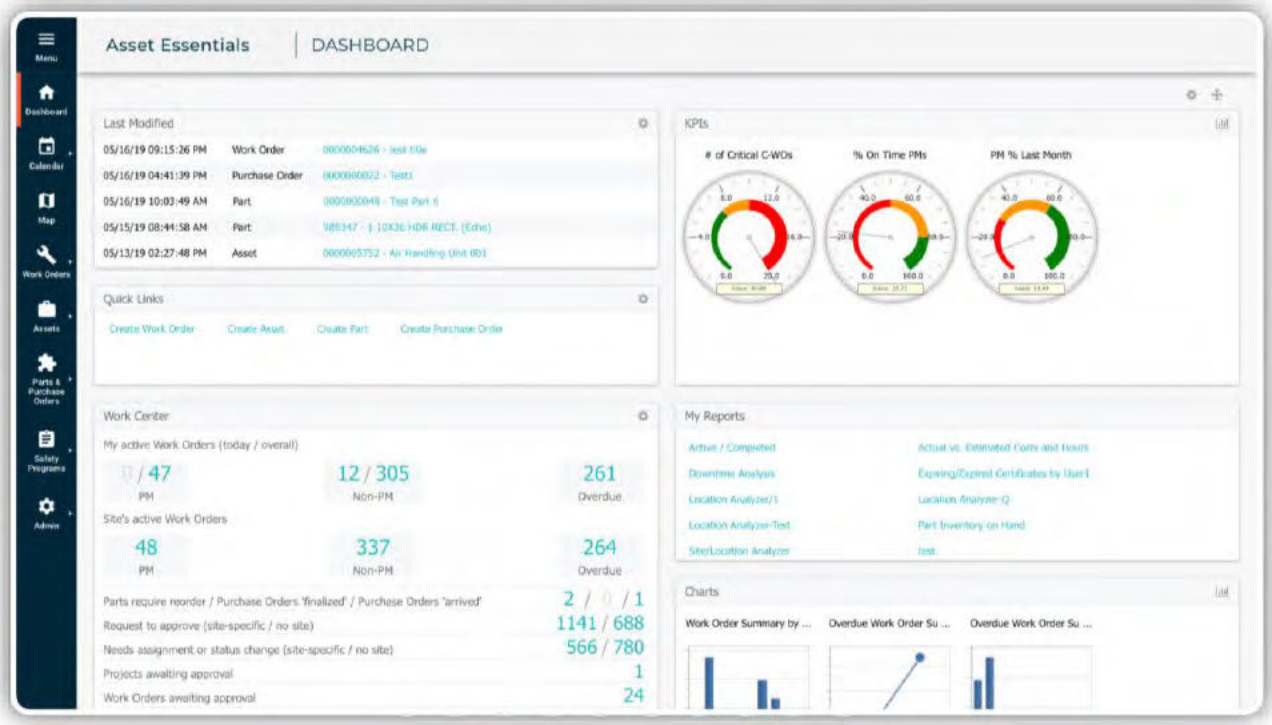
Key Features:

- Web-based service requestor supporting a user-friendly interface for individuals to submit and track service requests.
- Mobile App designed for dispatching/updating Work Orders via a SmartDevice…eliminating lag times related to data entry and reducing paper usage.
- Automated e-mail capabilities notify requestors of the status of work they requested.
- Numerous reports on cost and productivity, as well as the ability to export data into Excel for endless opportunities to sort and present information.
- Historical Records of all work completed supporting the protection of warranties and repair versus replace decisions.
- Assigns Preventative Maintenance work orders automatically to technicians based on the calendar and tasks required.
- Capable of storing equipment information such as manufacturer, model number, serial number, service dates, and warranty information.
- **The Budd Group's Preventive Maintenance Task Library** defines the tasks to be included in each Preventive Maintenance work order. Our task library is consistent with Manufacturer Recommendations whenever possible.



Smart Service:
Brightly Computerized Maintenance Management System

Asset Essentials Dashboard





Smart Service:
Key Control Procedures

The Budd Group is dedicated to ensuring our clients and visitors know their facilities will always be secure. All employees are responsible for properly maintaining the door keys assigned to them to prevent loss or theft. Our Key Control Policy mandates that all employees and supervisory personnel strictly adhere to the Key Handling and Control Guidelines outlined in this policy. Failure to do so will result in disciplinary action, including possible termination.

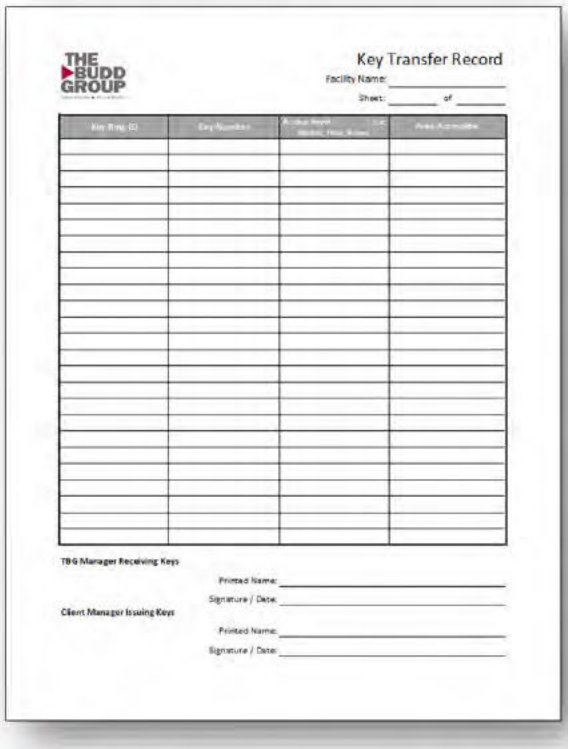
During implementation, an inventory of all keys will be taken with Beaufort County School District Facilities staff, and documentation will be provided via a ***Key Transfer Record***.

Maintenance Managers must always lock door keys in a secure Key Lock Box or location agreed upon with the district. Only trained and assigned employees will have direct access to the Key Lock Box, which must be securely mounted to a wall or kept in an otherwise secure location agreed upon with the client when not in use.

A ***sign-in and sign-out process*** will be established with the district. The Zone Managers will also complete a monthly inventory.

In the event of lost or stolen keys, the Zone Manager must contact the District Manager within one hour of the key loss. The Budd Group's Branch Management will take appropriate action to resolve the issue and prevent future occurrences.

Another measure The Budd Group will take is to ***purchase Budd Group Apple AirTags***. A uniquely numbered key tag will identify each keyring.


THE BUDD GROUP

Key Transfer Record

Facility Name: _____

Sheet: _____ of _____

Key Ring ID	Key Number	Access Point (Room, Floor, Building)	Area Accessible

TBG Manager Receiving Keys

Printed Name: _____

Signature / Date: _____

Client Manager Issuing Keys

Printed Name: _____

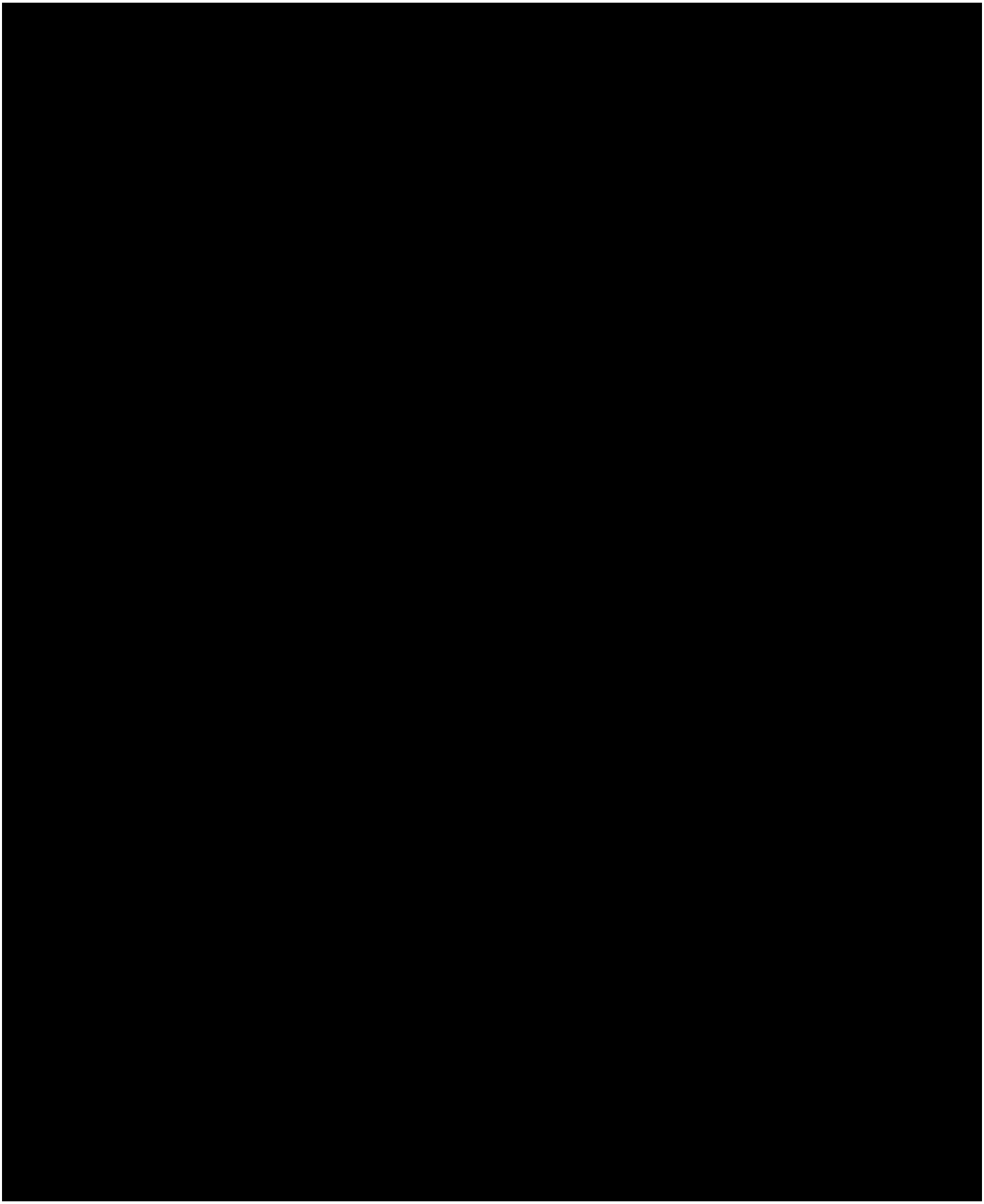
Signature / Date: _____

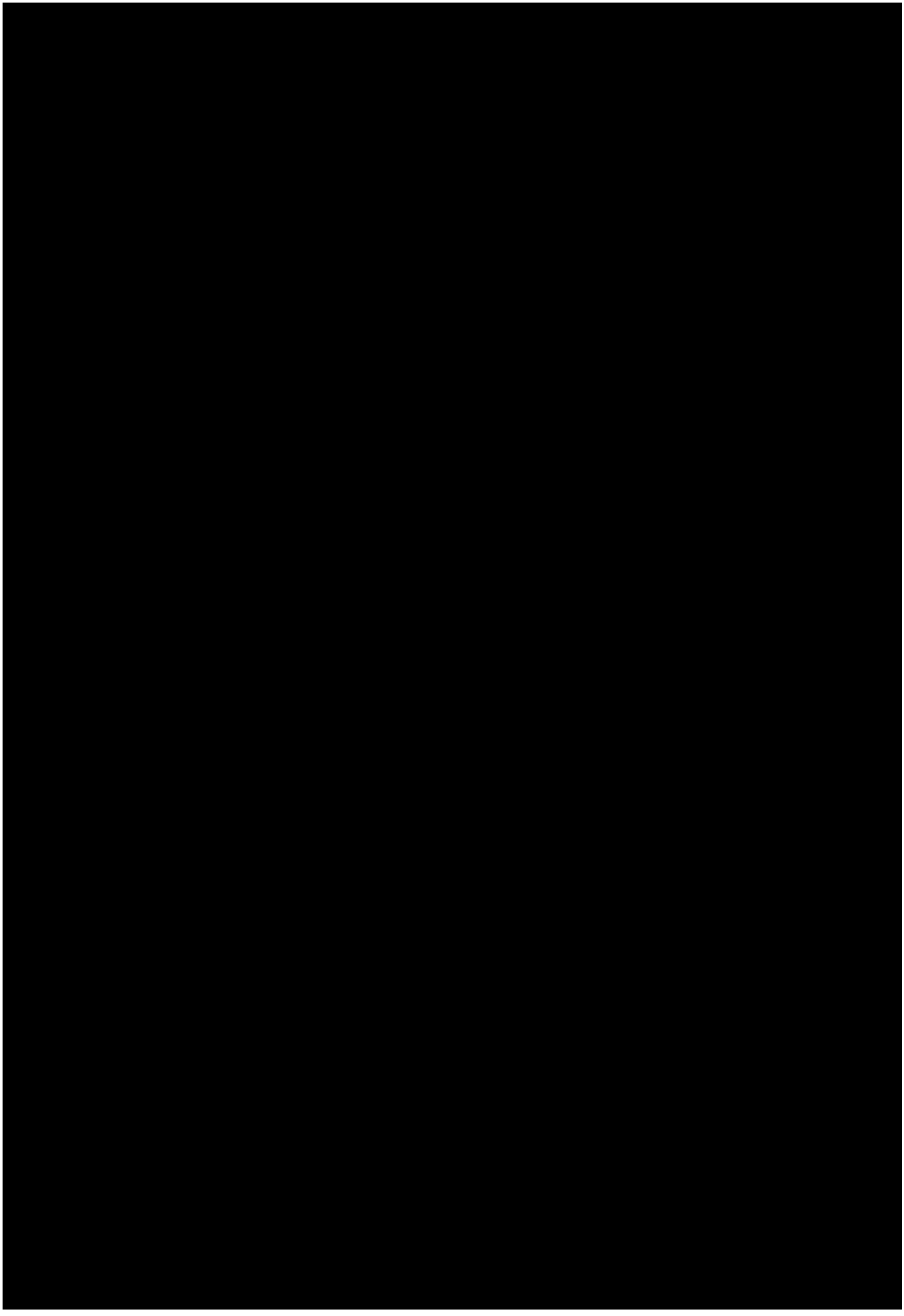


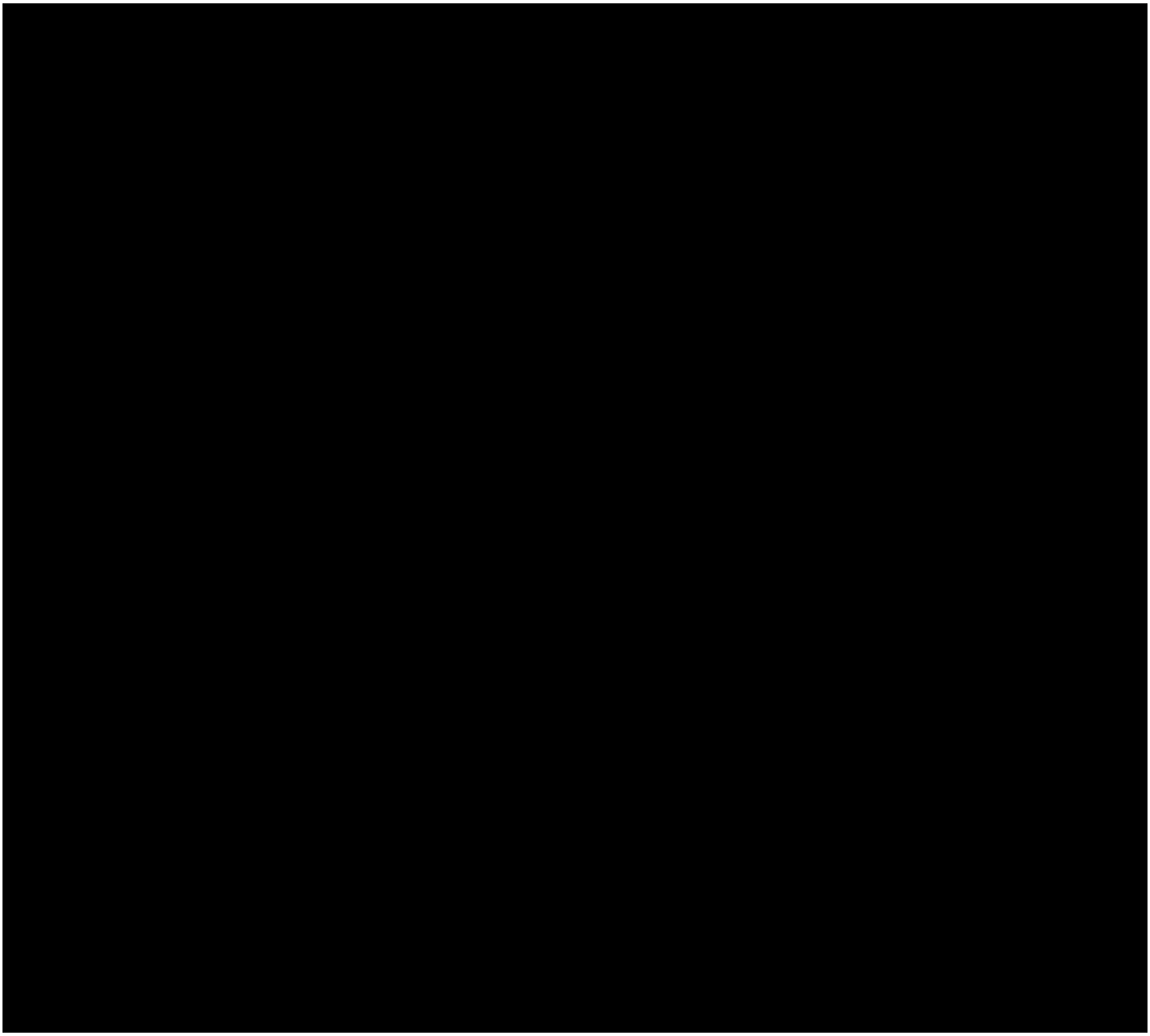




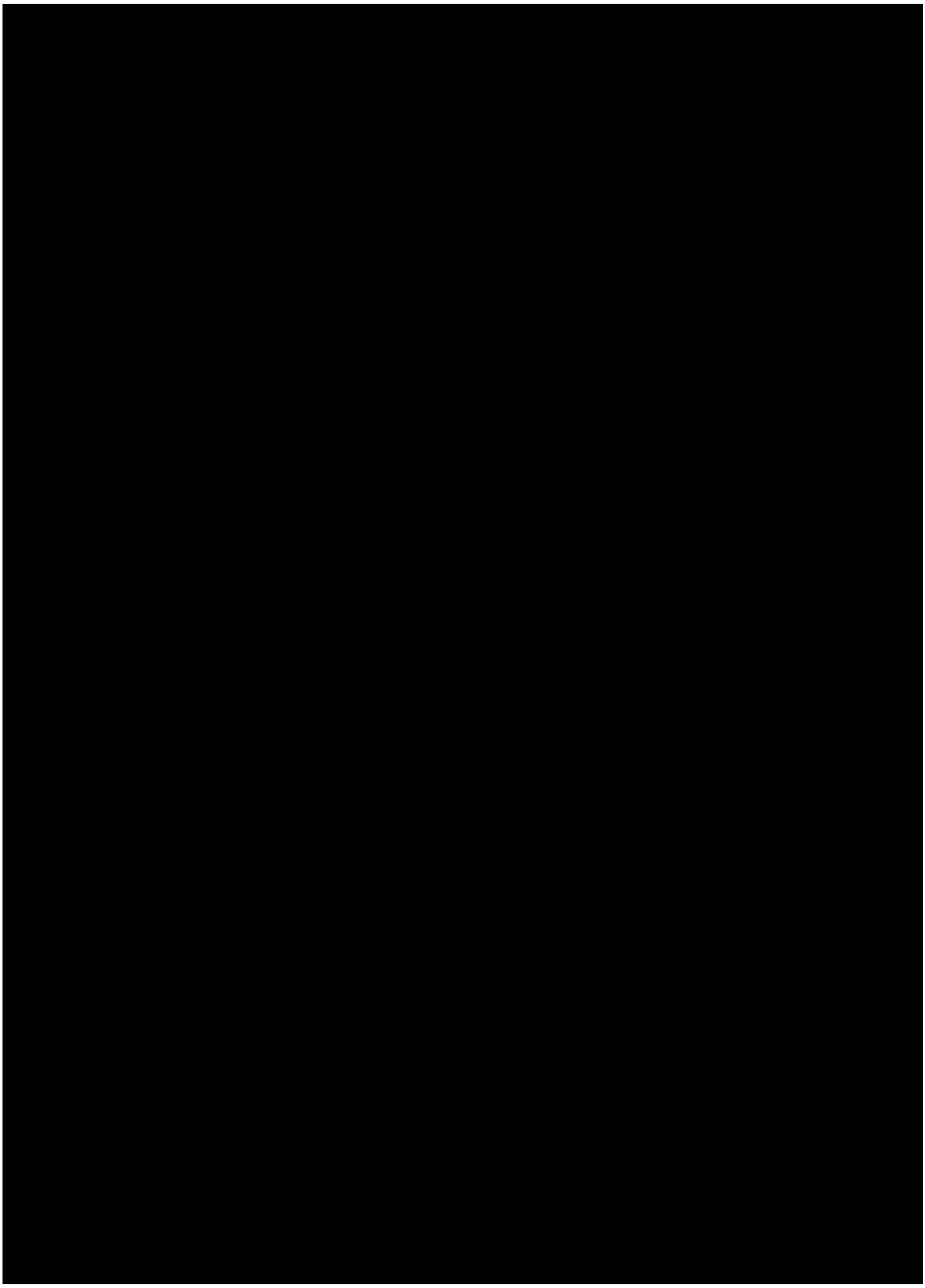


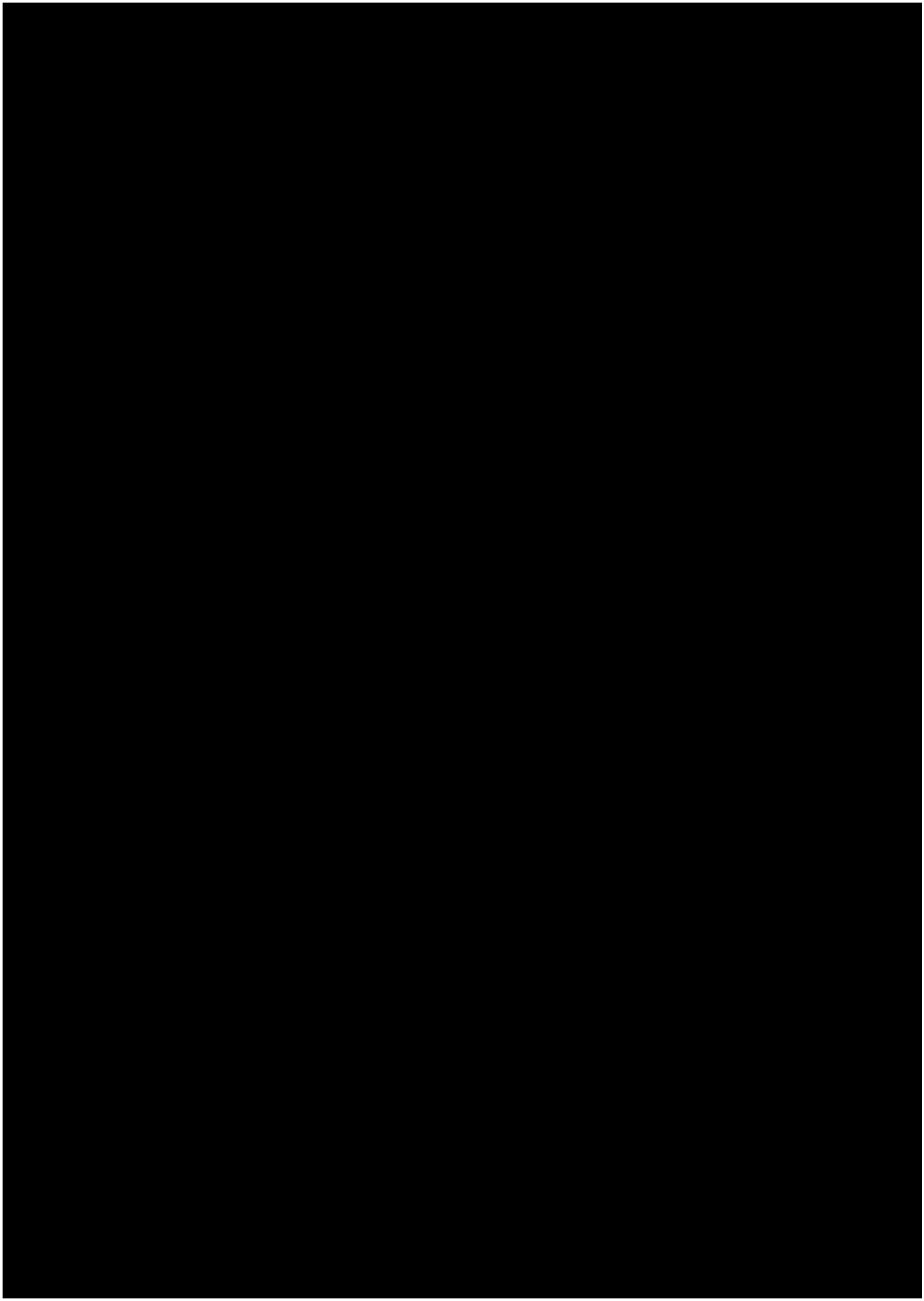


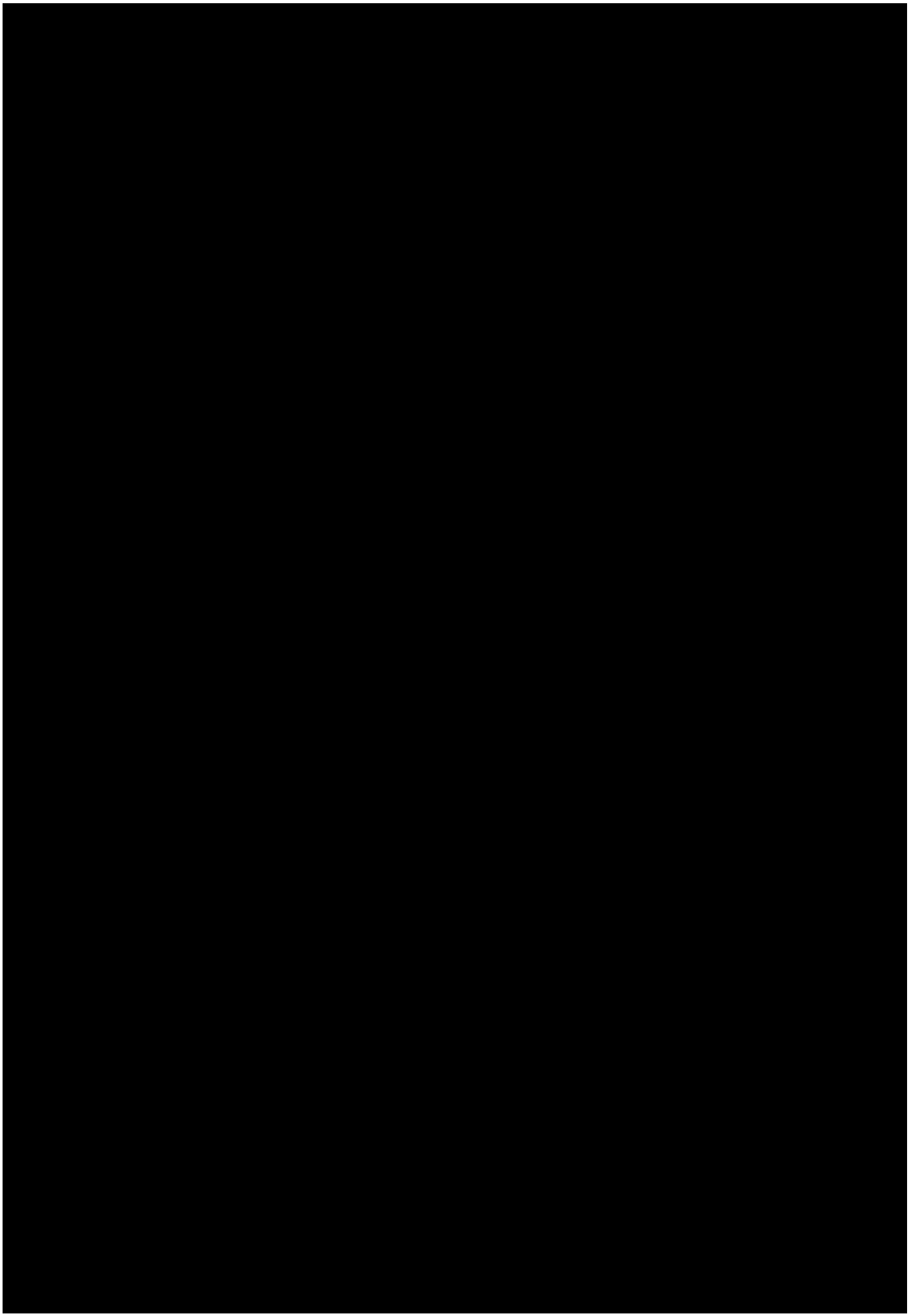


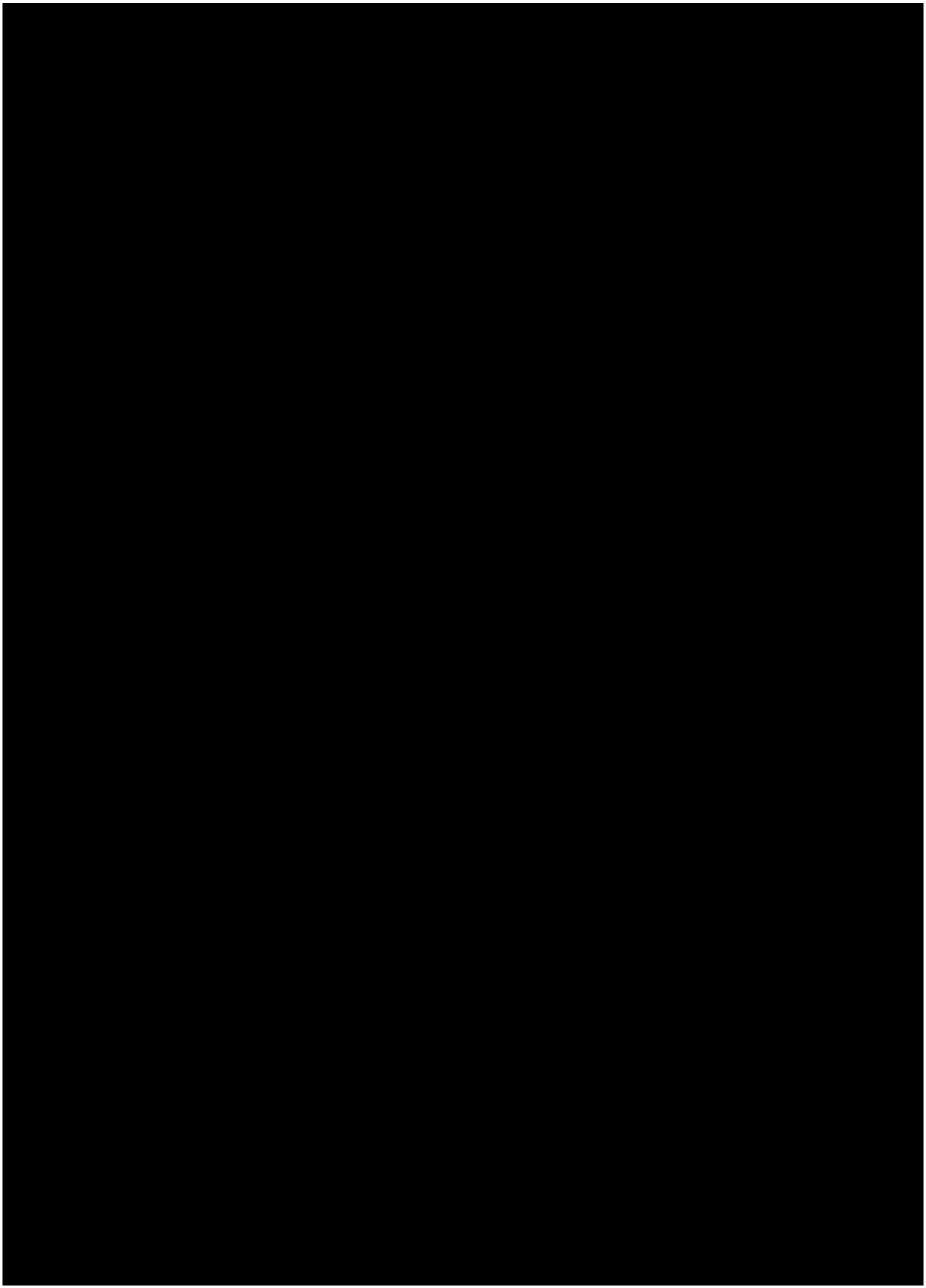


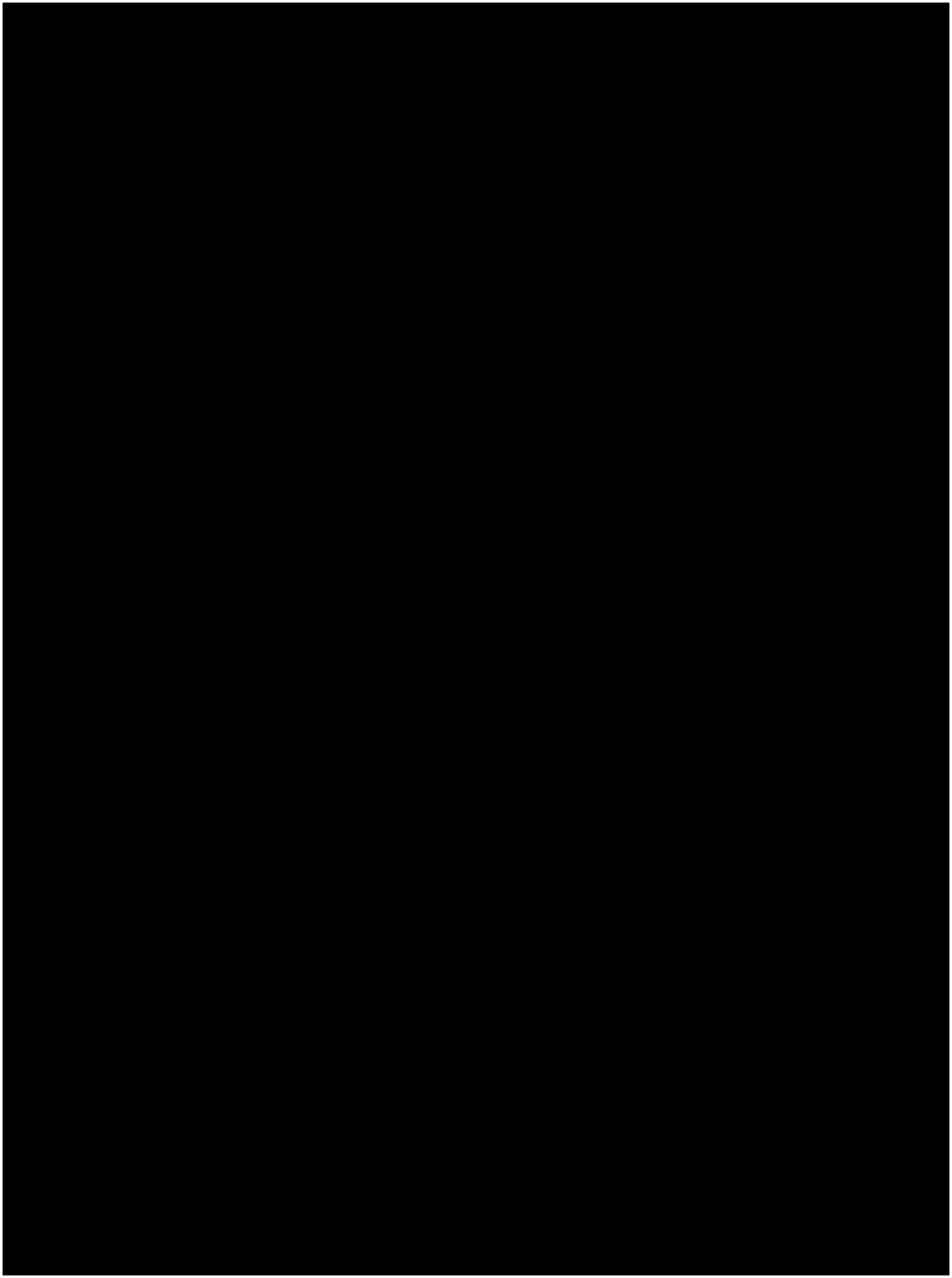


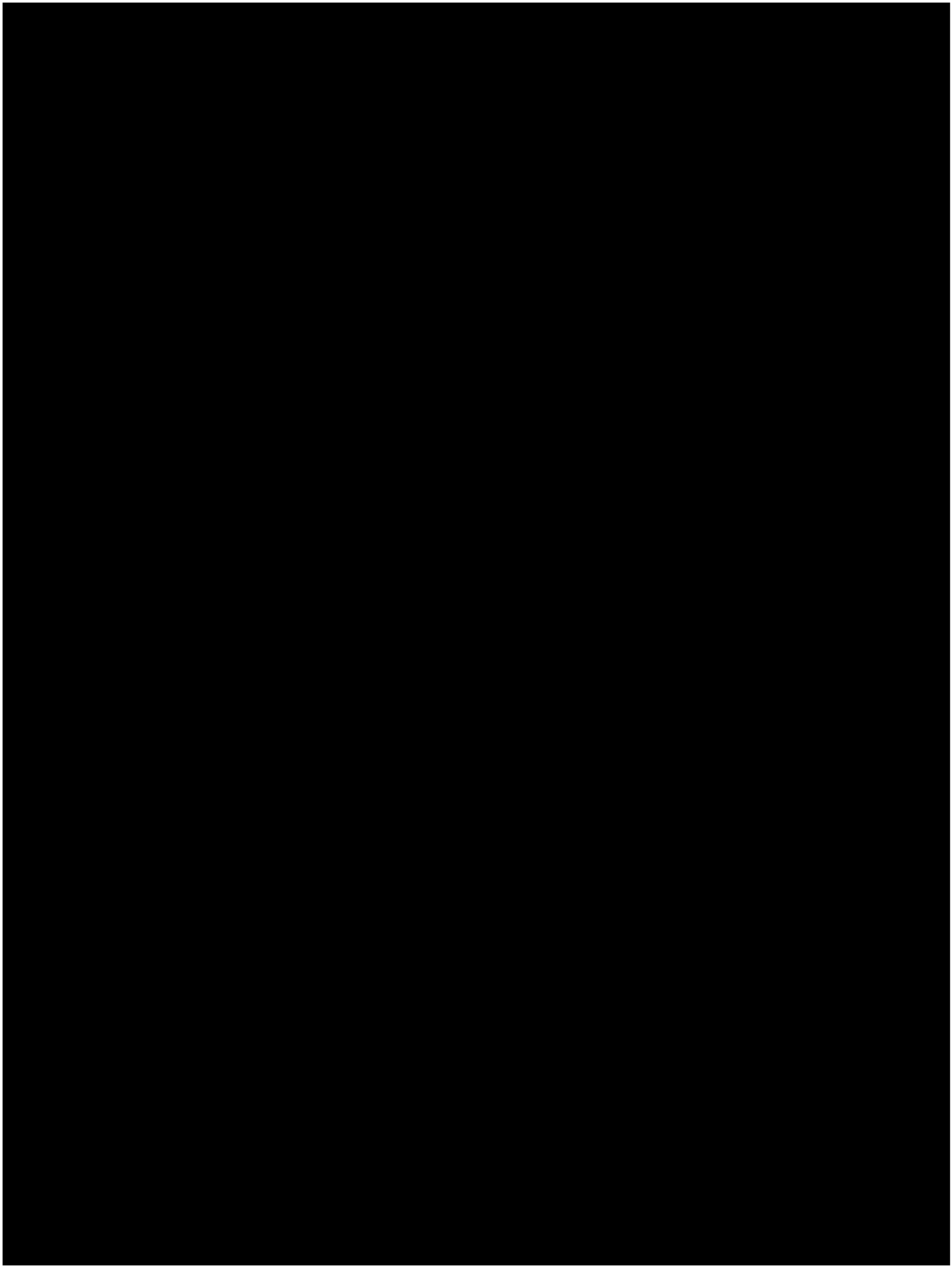


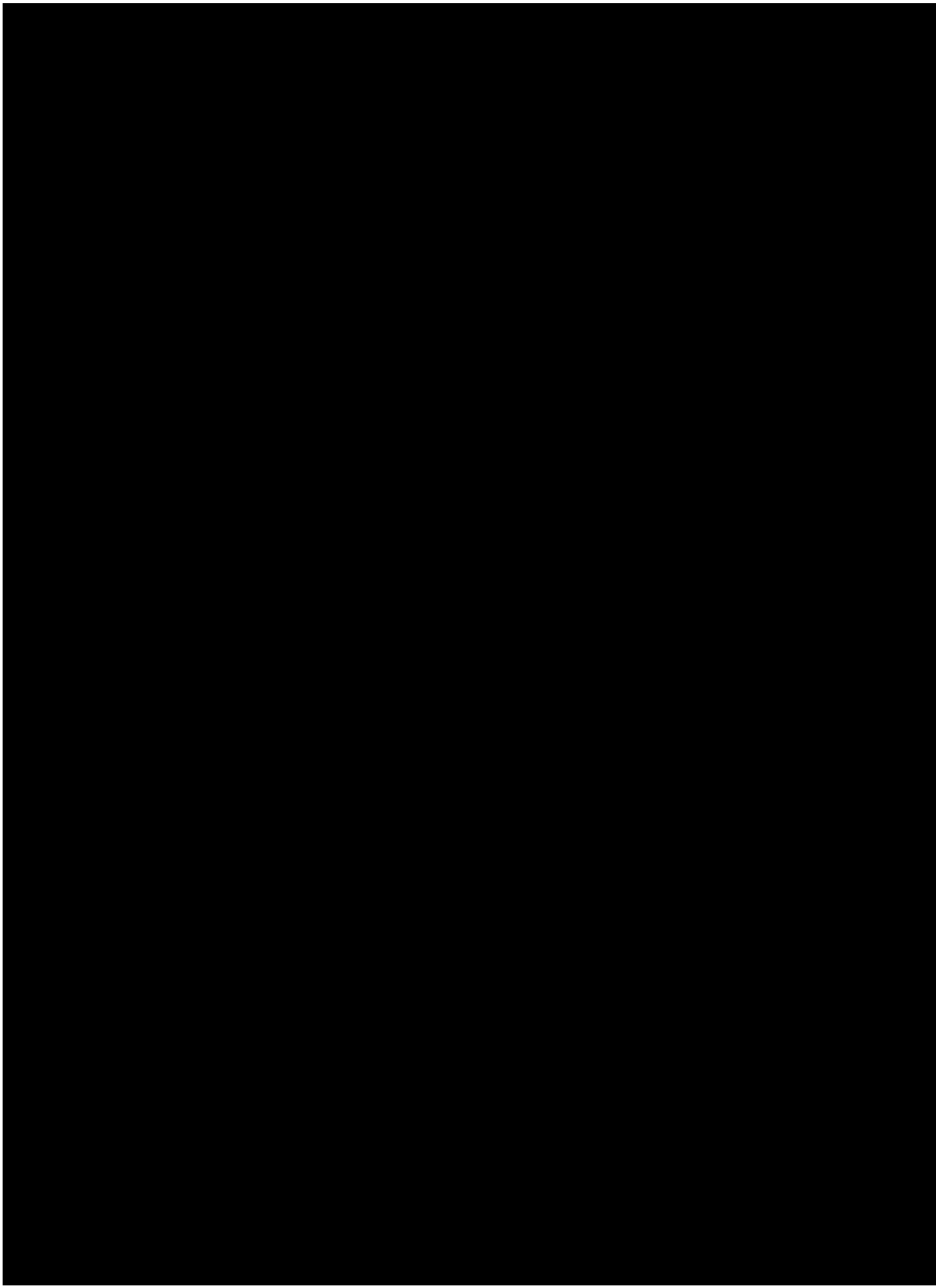










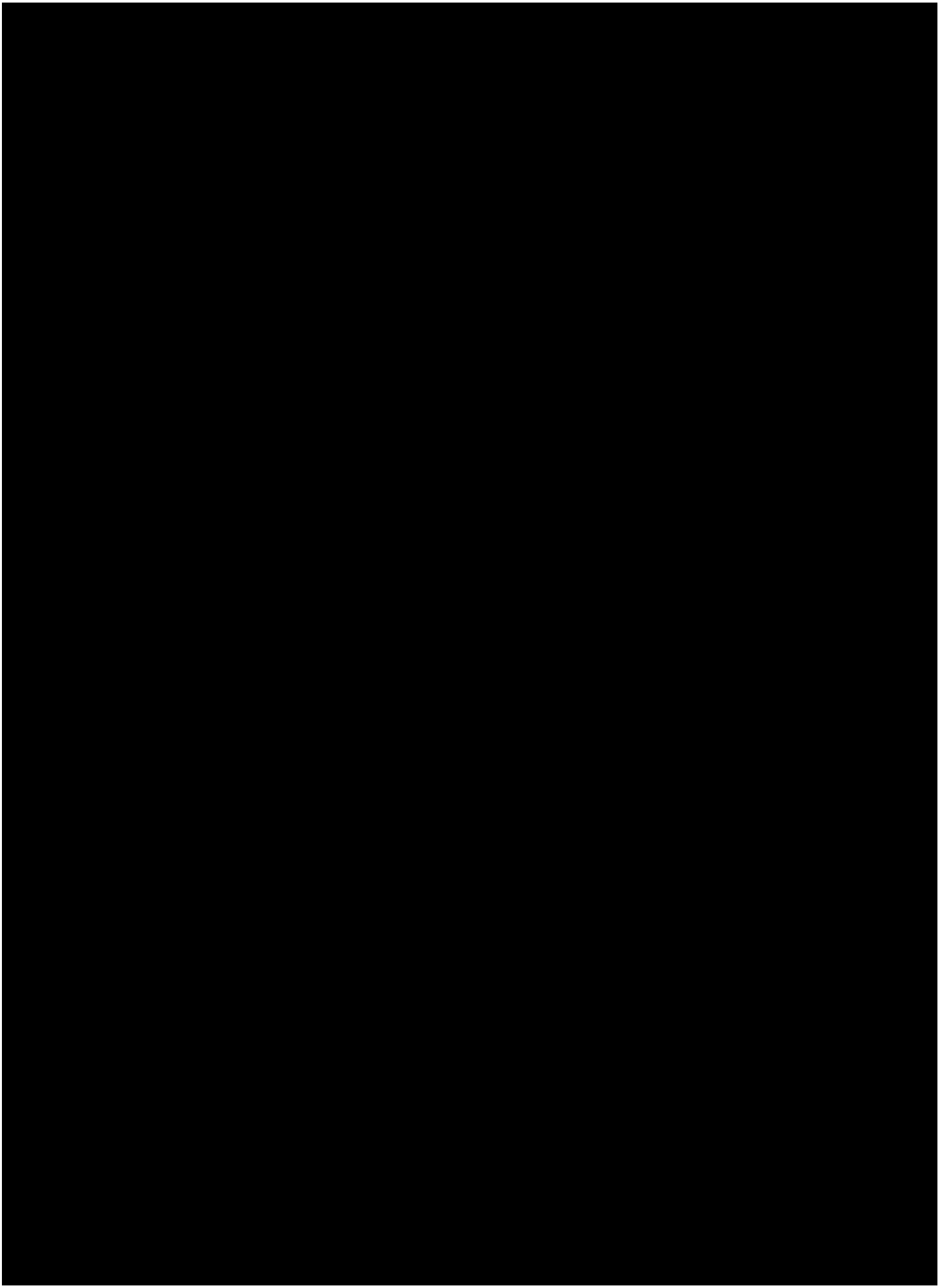


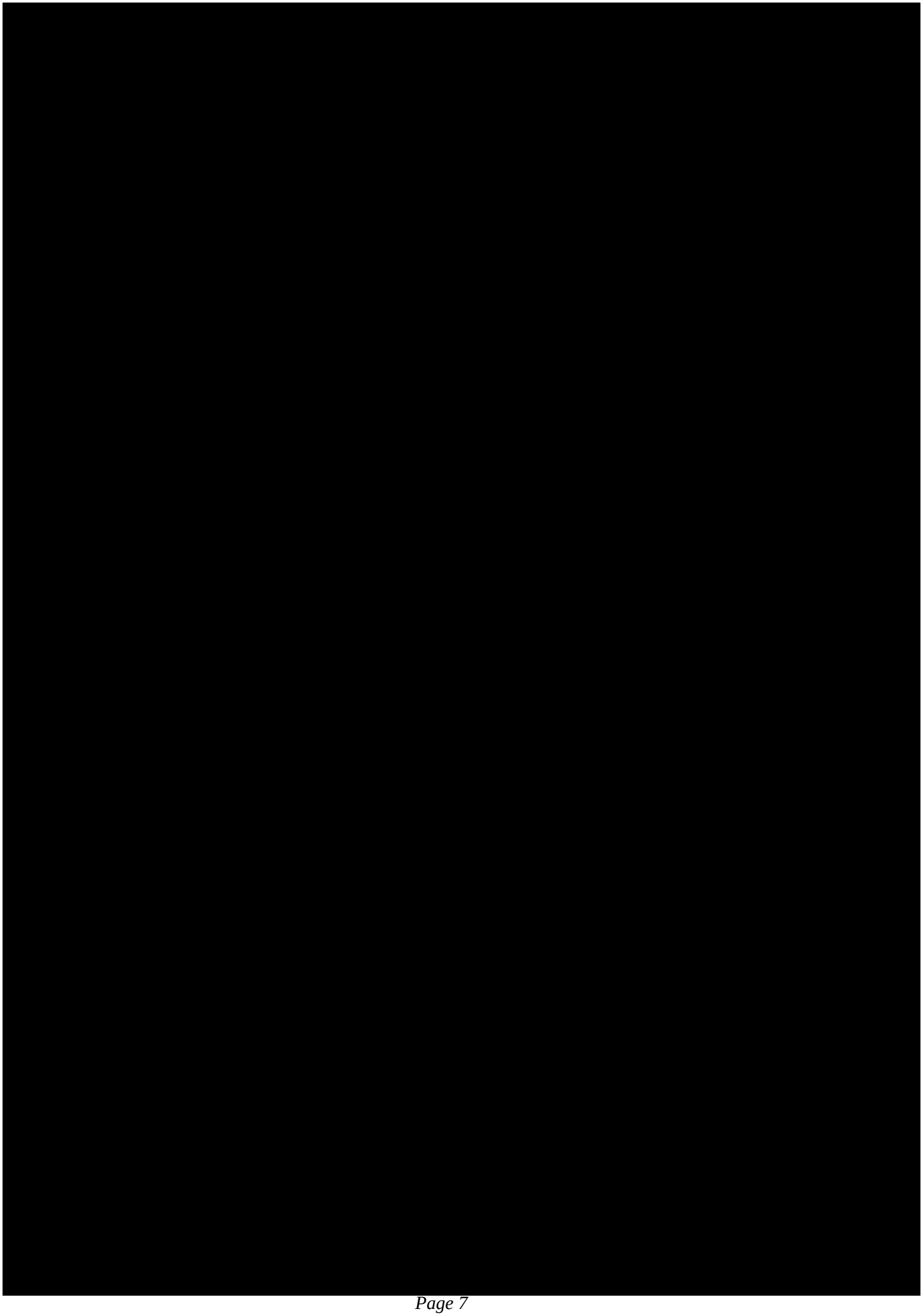


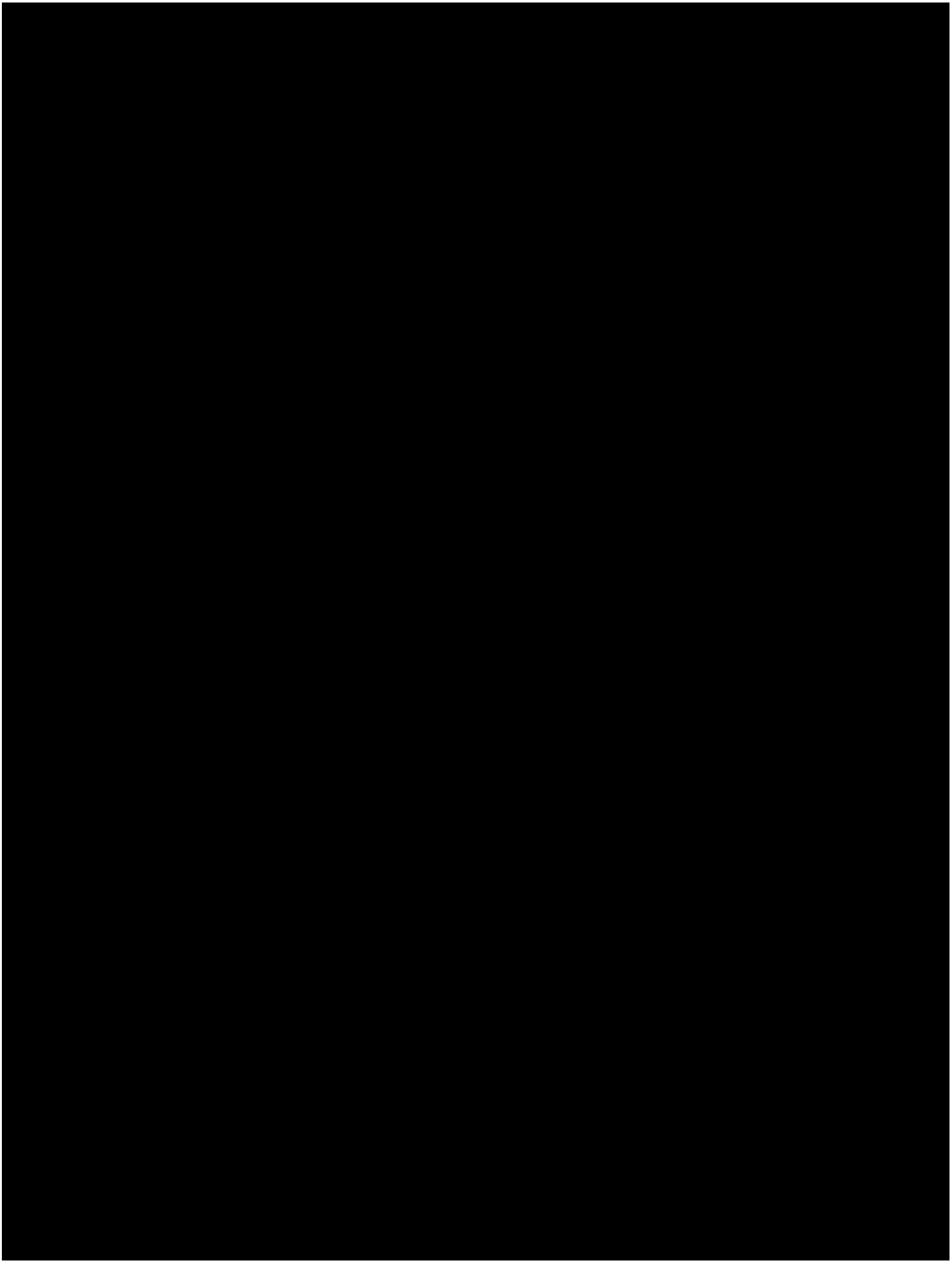


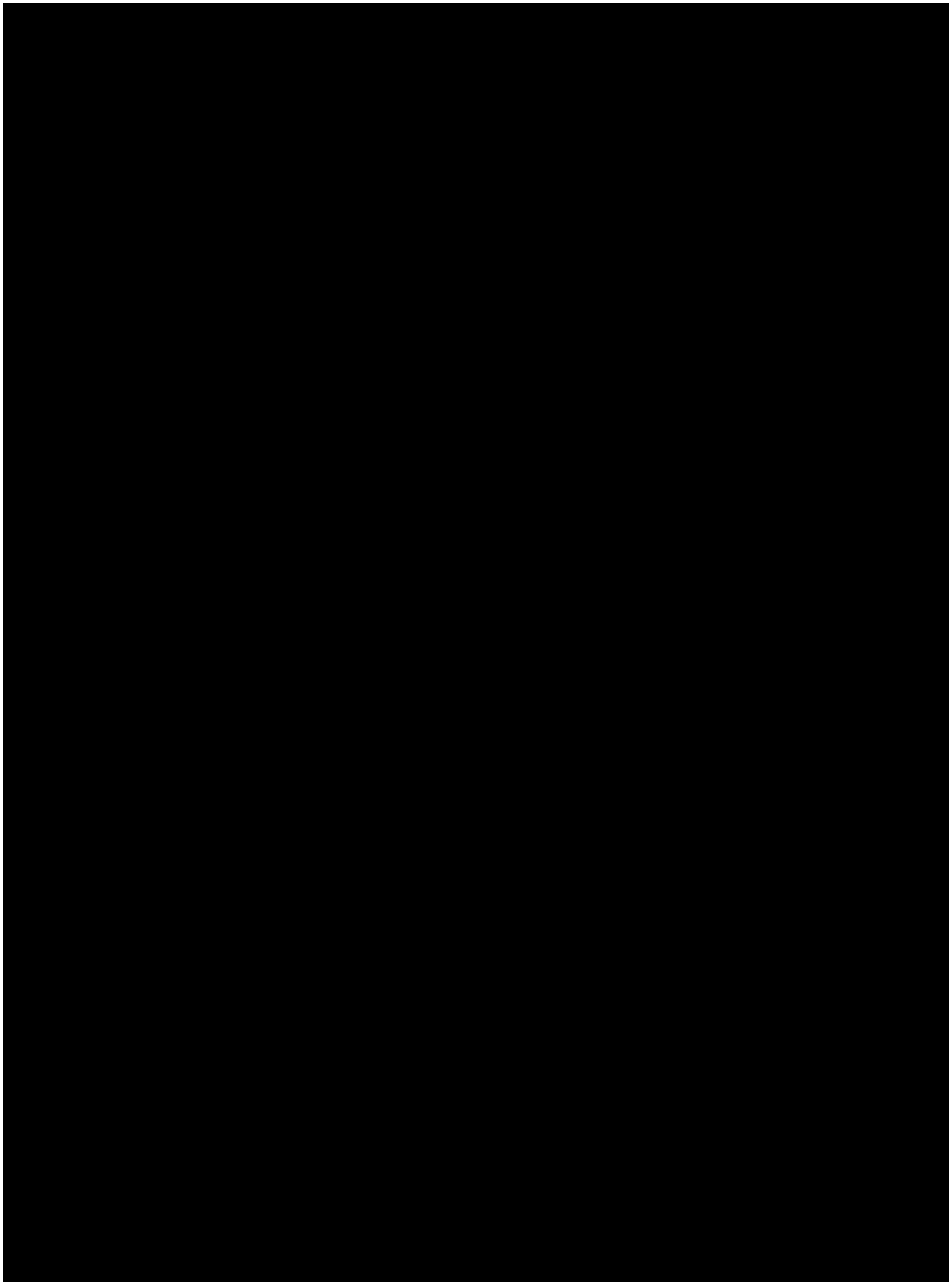


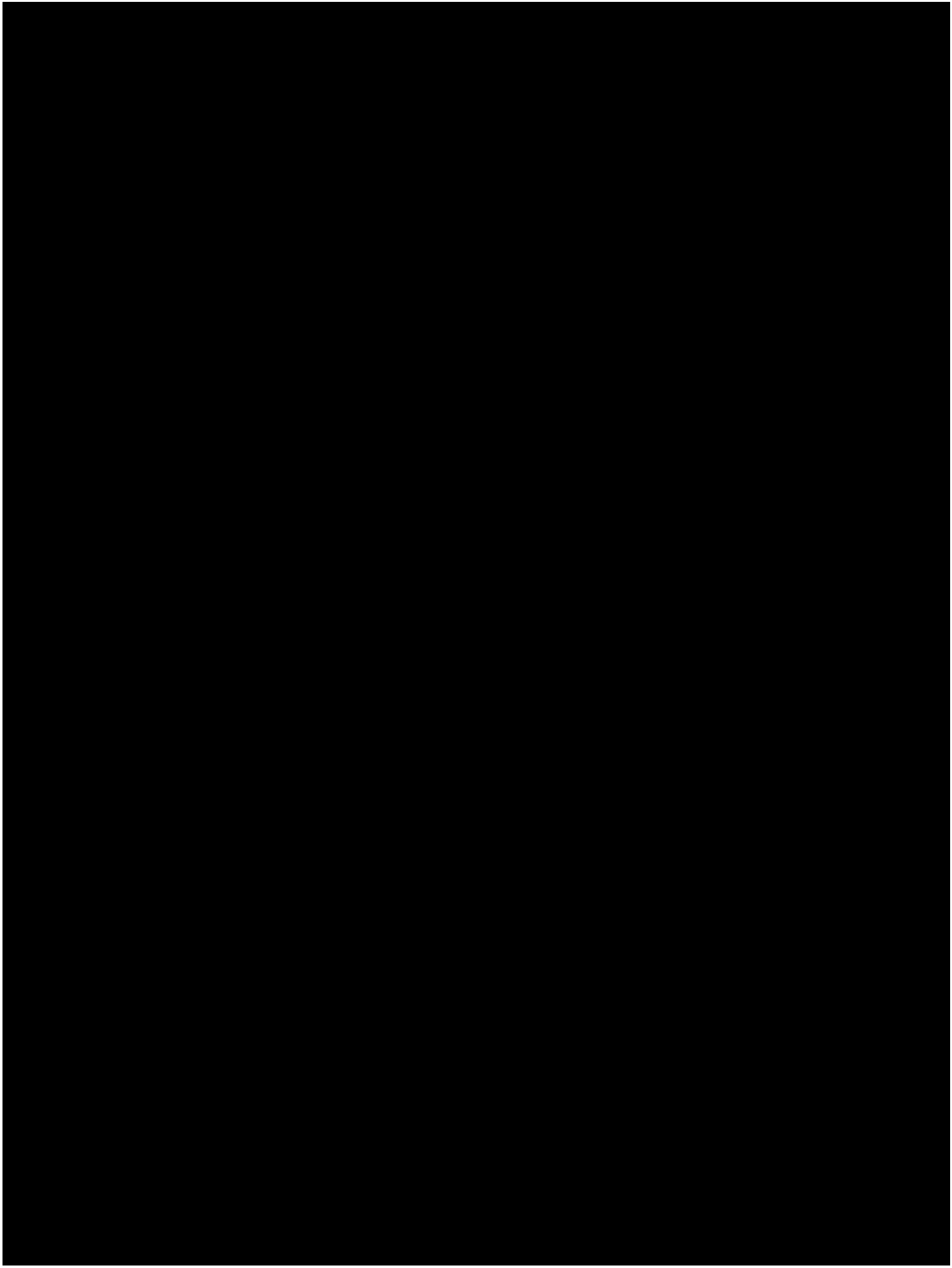


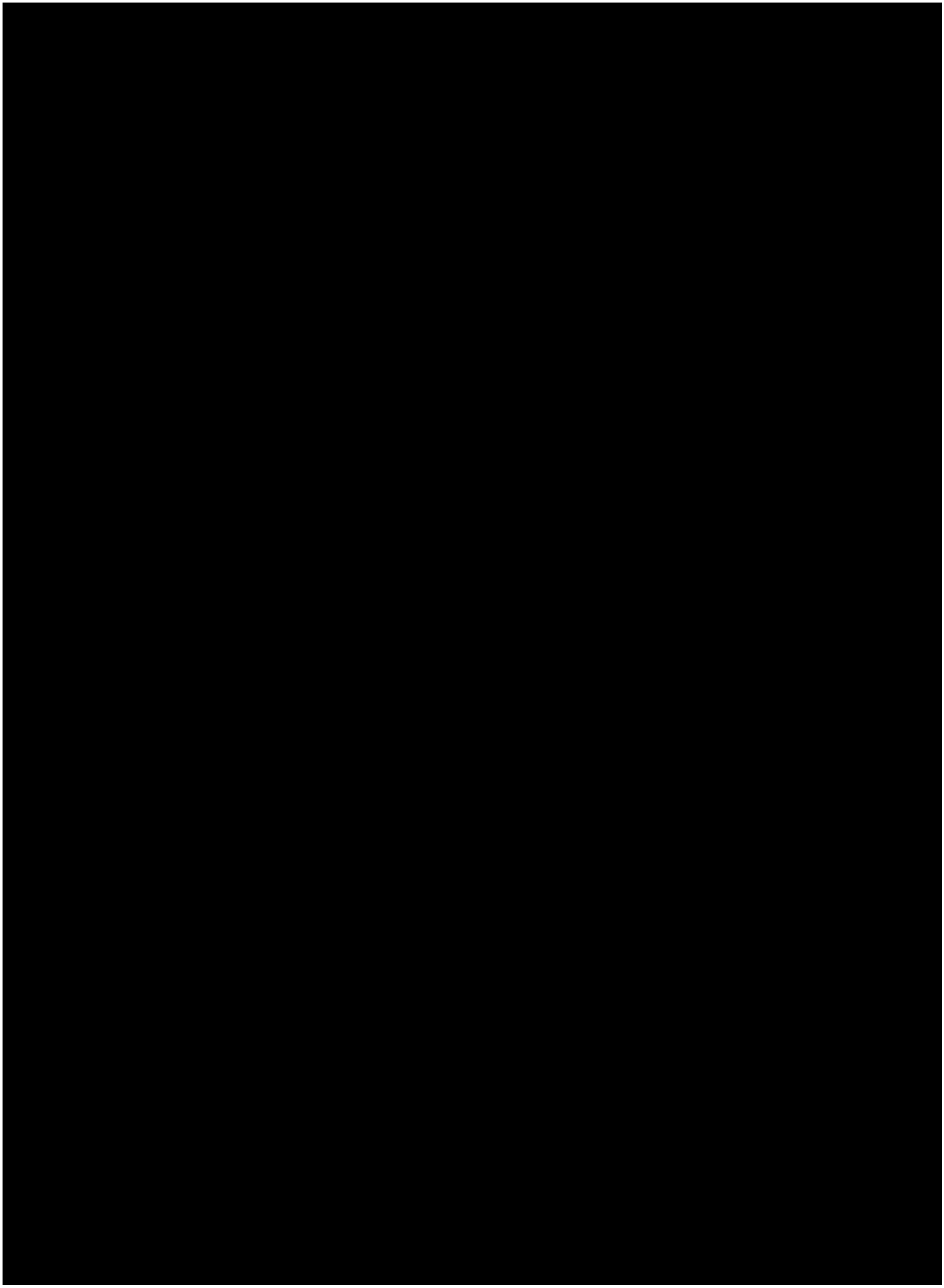


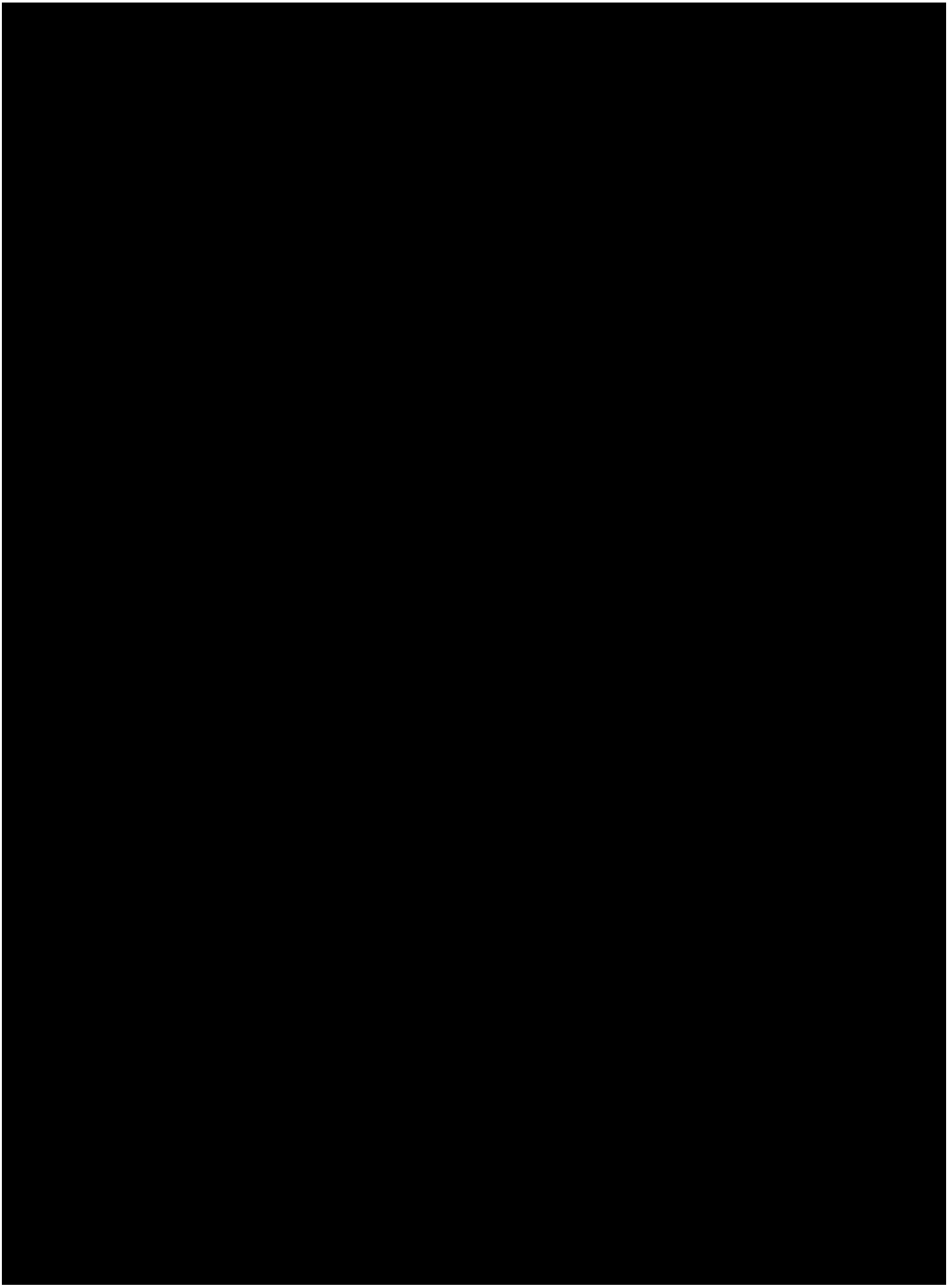


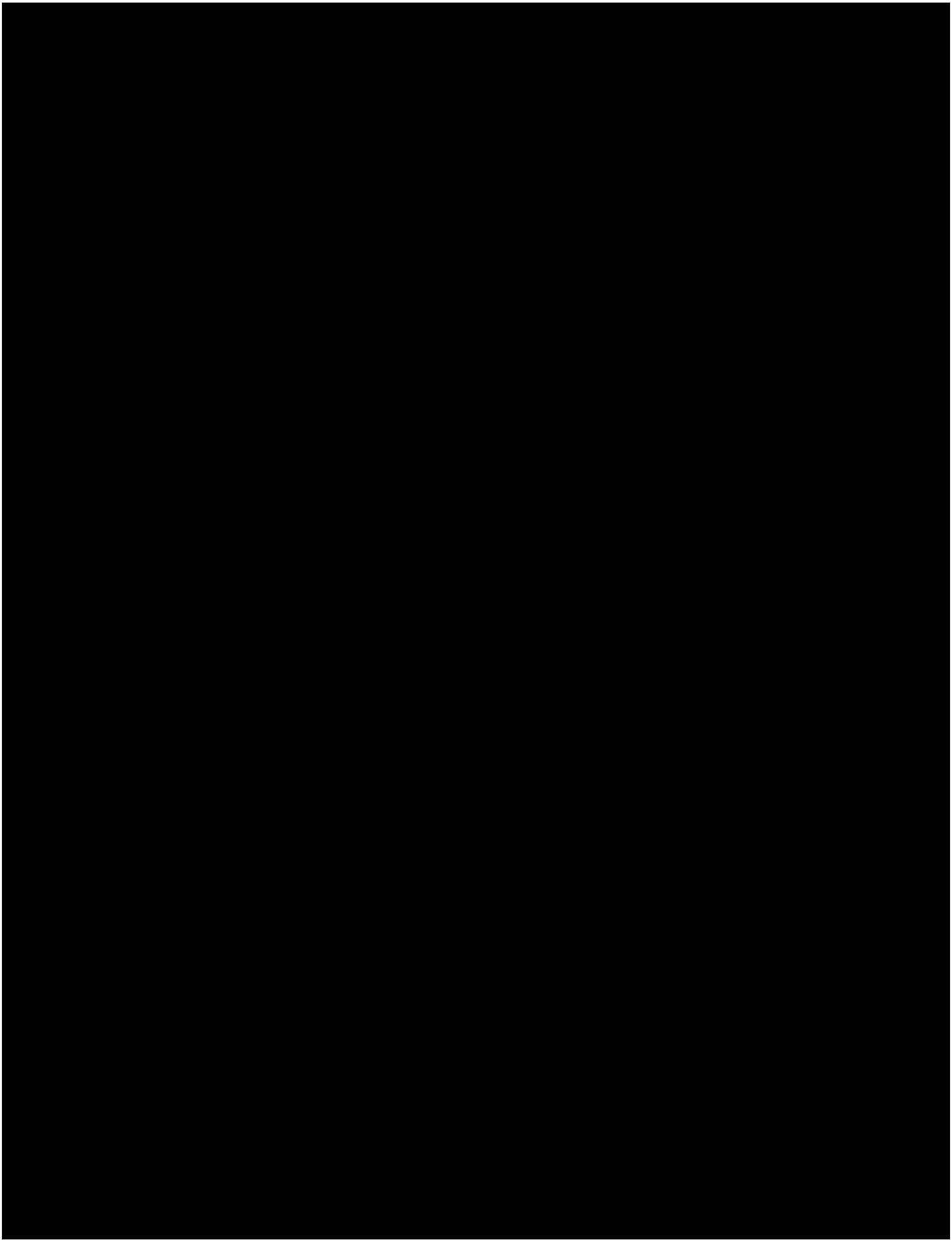
















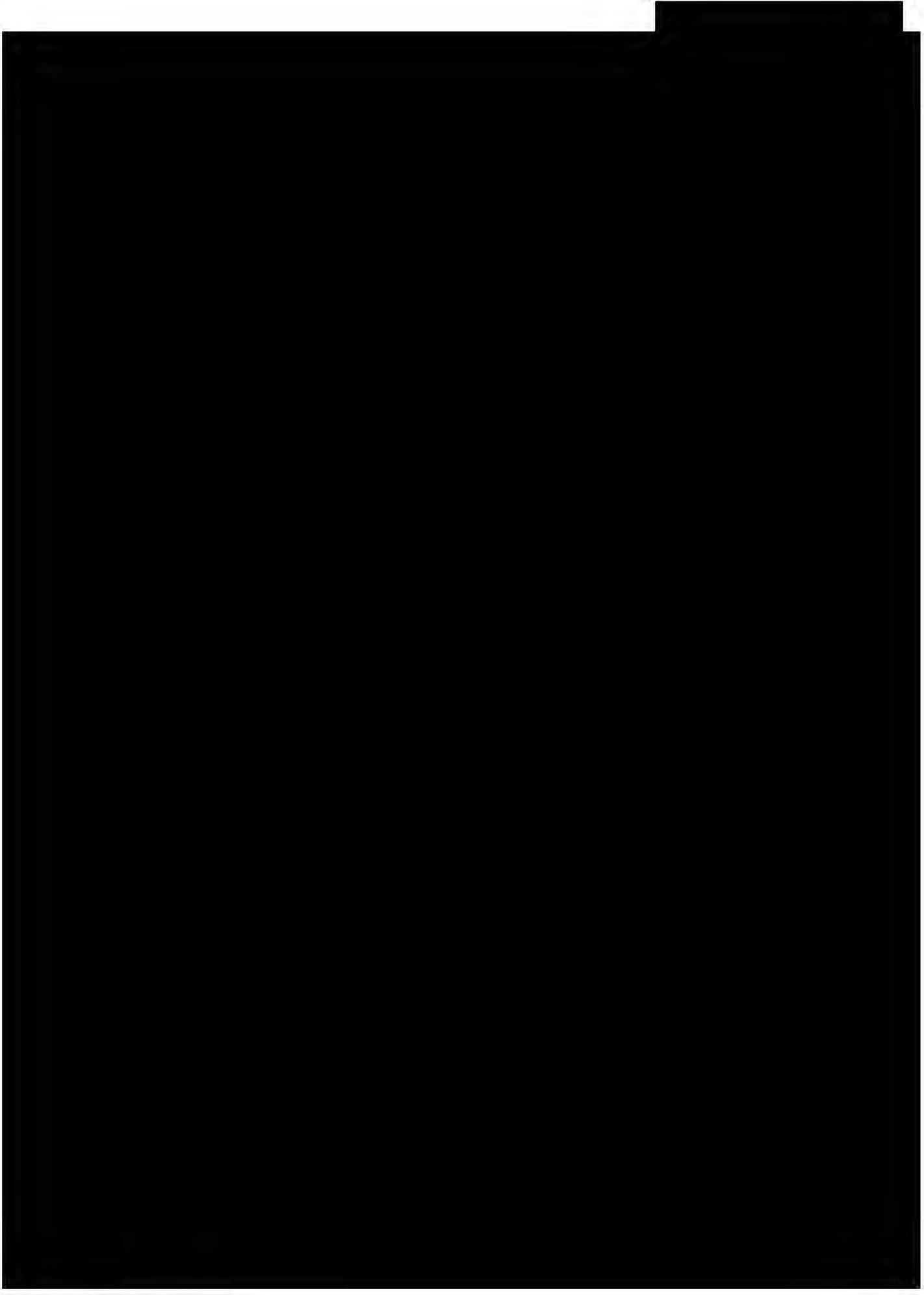


[redacted]

[redacted]

[redacted]

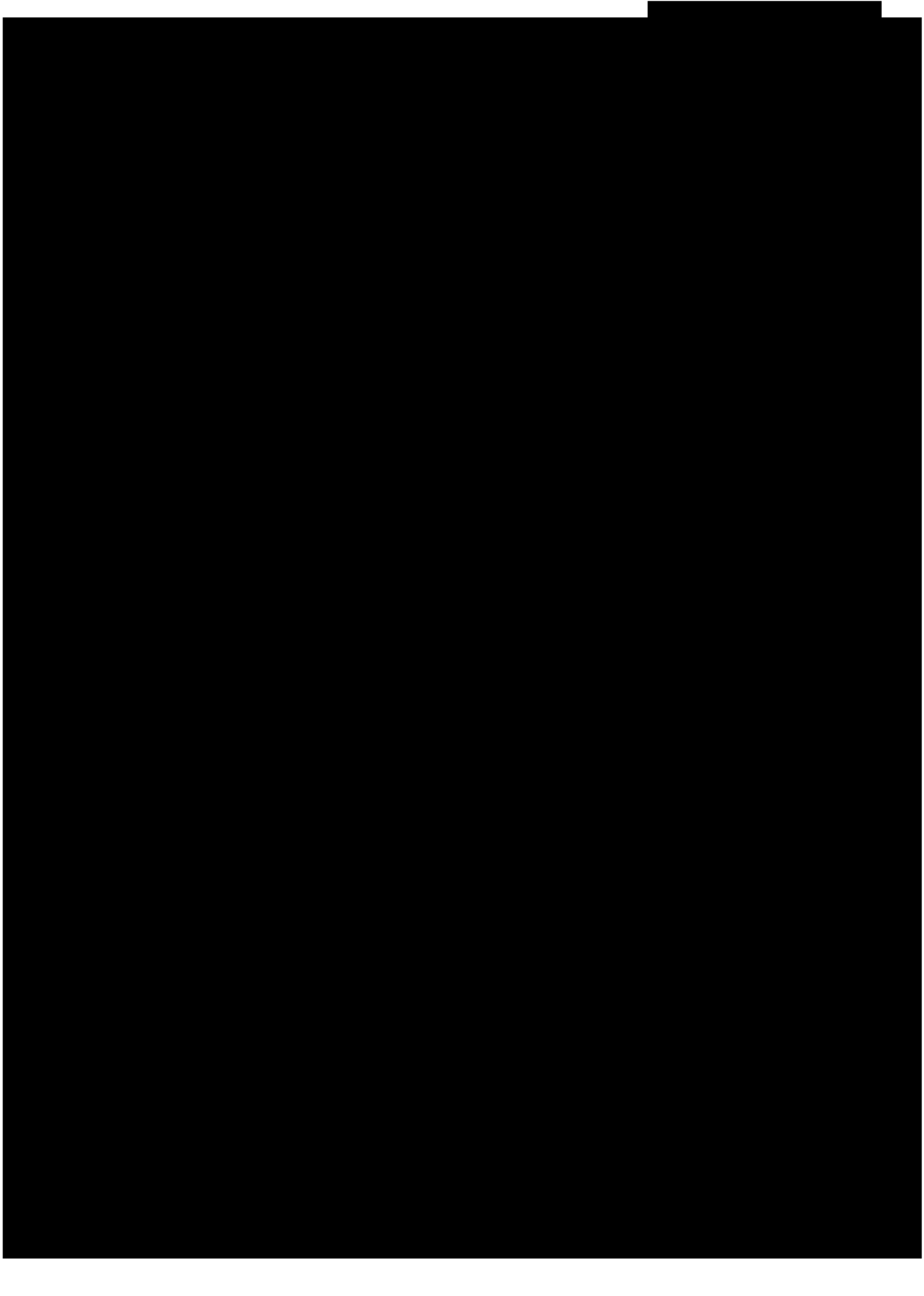




[redacted]

[redacted]

[redacted]



[redacted]

[redacted]

[redacted]

[redacted]

[redacted]



Smart Service:
Exceptions

The Budd Group has one item related to the RFP that we would like to be considered and discussed with Beaufort County School District.

Section 7.1.3 Termination for Convenience

We want to add the contractor to this:

Termination. The Procurement Officer, or the Contractor, may terminate this contract in whole or in part, for the convenience of the District. The Procurement Officer shall give written notice of the termination to the Contractor specifying the part of the contract terminated and when the termination becomes effective. The Contractor would provide a 90-day written notice.

The above is just a sample. The spirit of the request is to determine mutually beneficial language.



[redacted]



[redacted]

[redacted]

[redacted]

[redacted]



[redacted]

[redacted]

[redacted]

[redacted]



[redacted]

[redacted]

[redacted]

[redacted]



[redacted]

[redacted]

[redacted]

[redacted]



[redacted]

[redacted]





[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]

[redacted]



Smart Service:

Qualifications – Required Information

CONFIDENTIAL

North American Technician Excellence

The Budd Group ensures expert maintenance of educational facility HVAC-R systems by prioritizing NATE certification for our technicians. Recognizing the critical role of these systems in learning environments, we invest in NATE certification to guarantee our team possesses advanced installation, maintenance, and service skills. This commitment ensures efficient operation, improved energy use, and prolonged equipment lifespan in educational settings.

Our focus on NATE-certified professionals reflects our dedication to superior service delivery. NATE certification signifies a nationally recognized level of expertise, leading to accurate diagnostics, reliable repairs, and adherence to industry best practices. This translates to optimal climate control, enhanced indoor air quality, and cost-effective operations for the educational institutions we proudly serve

Certified Facilities Manager

At The Budd Group, we recognize the Certified Facility Manager (CFM) credential as a valuable asset for our maintenance management team. While not solely focused on HVAC-R, the CFM certification provides our managers with a comprehensive understanding of all critical building systems, including HVAC-R, within the broader context of facility operations and maintenance. This holistic perspective equips them with the knowledge to strategically oversee these systems, ensuring their efficient operation, sustainability, and integration with the overall goals of the educational facilities we serve. By encouraging and supporting our maintenance managers in obtaining their CFM, we ensure they possess the crucial management skills necessary to optimize building performance and provide exceptional service to our clients.

Memberships

The Budd Group is focused on providing our clients with the best service and resources available. We invest in participating in professional organizations that strengthen our expertise and provide us with continuous education that we can share to add value to our services. As you will notice from our membership diversity, it takes a team of people with different backgrounds to make an organization successful. We benefit from these organizations by participating in their continuous education programs and networking with friends and colleagues. We are actively involved in each of the following organizations and volunteer our time. Organizations such as BSCAI and IFMA have annual conferences that allow our managers to further their development in our industry through multiple educational sessions. In addition, we attend numerous trade shows sponsored by the following organizations that will enable our managers to experience new technology and processes in our industry.

- APPA (Leadership in Educational Facilities)
- BSCAI (Building Services Contractors Association International)
- IFMA (International Facility Management Association)
- BOMA (Building Owners and Managers Association)
- IREM (Institute of Real Estate Managers)
- Local Chambers of Commerce



[redacted]

[redacted]

BUILDING SERVICE CONTRACTORS
ASSOCIATION INTERNATIONAL

[redacted]

APPA
LEADERSHIP IN EDUCATIONAL FACILITIES

[redacted]



[redacted]



[redacted]

upon the recommendation of the Board of Certified Safety Professionals,
by virtue of the authority vested in it, has conferred on

Robert Joel Crotts

the credential of

Construction Health and Safety Technician

and has granted the title as evidence of meeting the qualifications and passing
the required examination so long as this credential is not suspended or revoked
and is renewed annually and meets all recertification requirements.

[redacted]

Board President

[redacted]

Board Secretary



August 2, 2022

Date Issued

CHST-16280

Credential Number

The digital badge is the official documentation of the certificate.

[redacted]

upon the recommendation of the Board of Certified Safety Professionals,
by virtue of the authority vested in it, has conferred on

Robert Joel Crotts

the credential of

Certified Safety Professional

and has granted the title as evidence of meeting the qualifications and passing
the required examination so long as this credential is not suspended or revoked
and is renewed annually and meets all recertification requirements.

[redacted]
Board President

[redacted]
Board Secretary



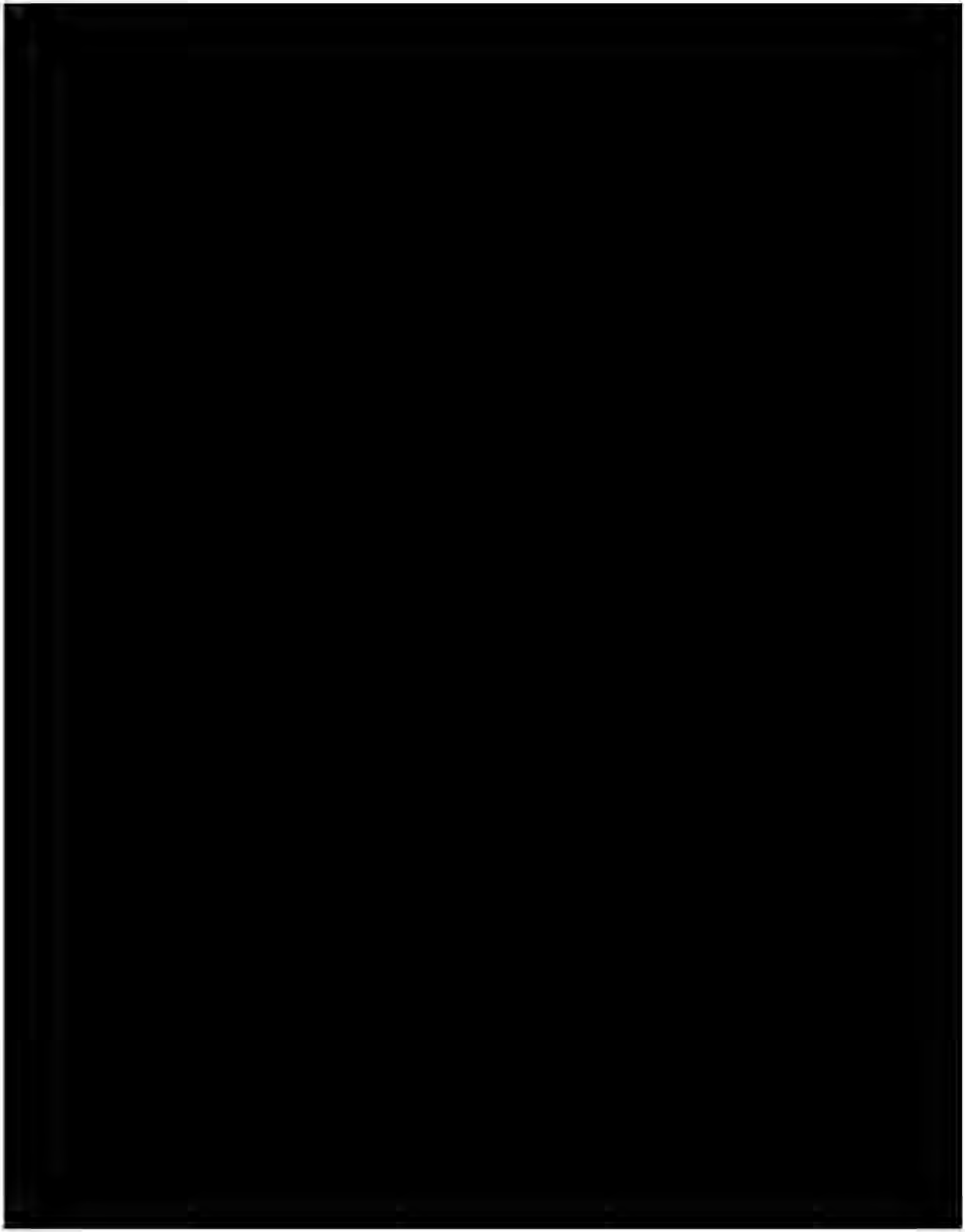
May 5, 2025

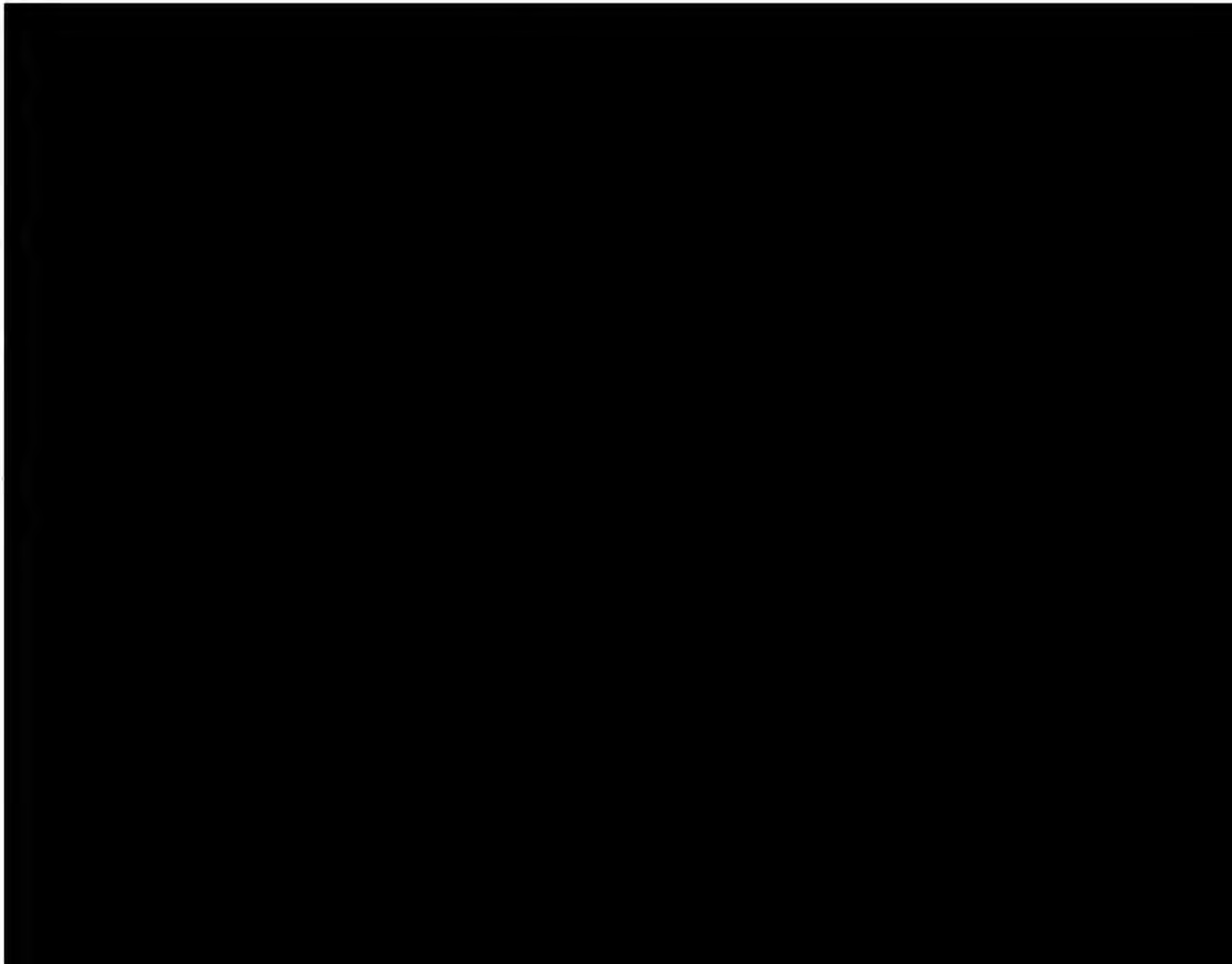
Date Issued

CSP-47823

Credential Number

The digital badge is the official documentation of the certificate.





NATIONAL FIRE PROTECTION ASSOCIATION

CERTIFICATE OF COMPLETION

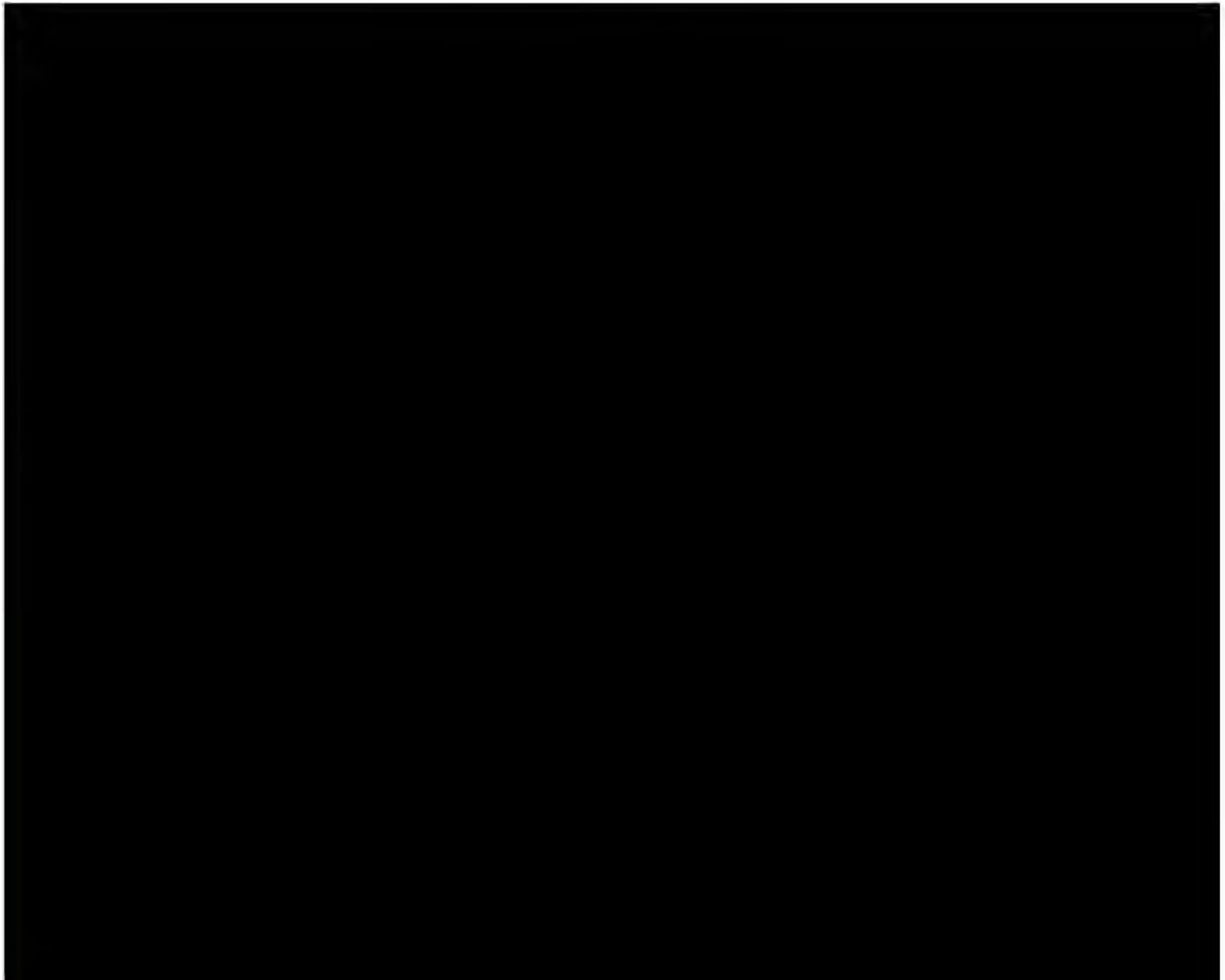
NFPA 3000™ (PS): Active Shooter/Hostile Event Response; Plan, Respond, Recover Program Specialist Online Training

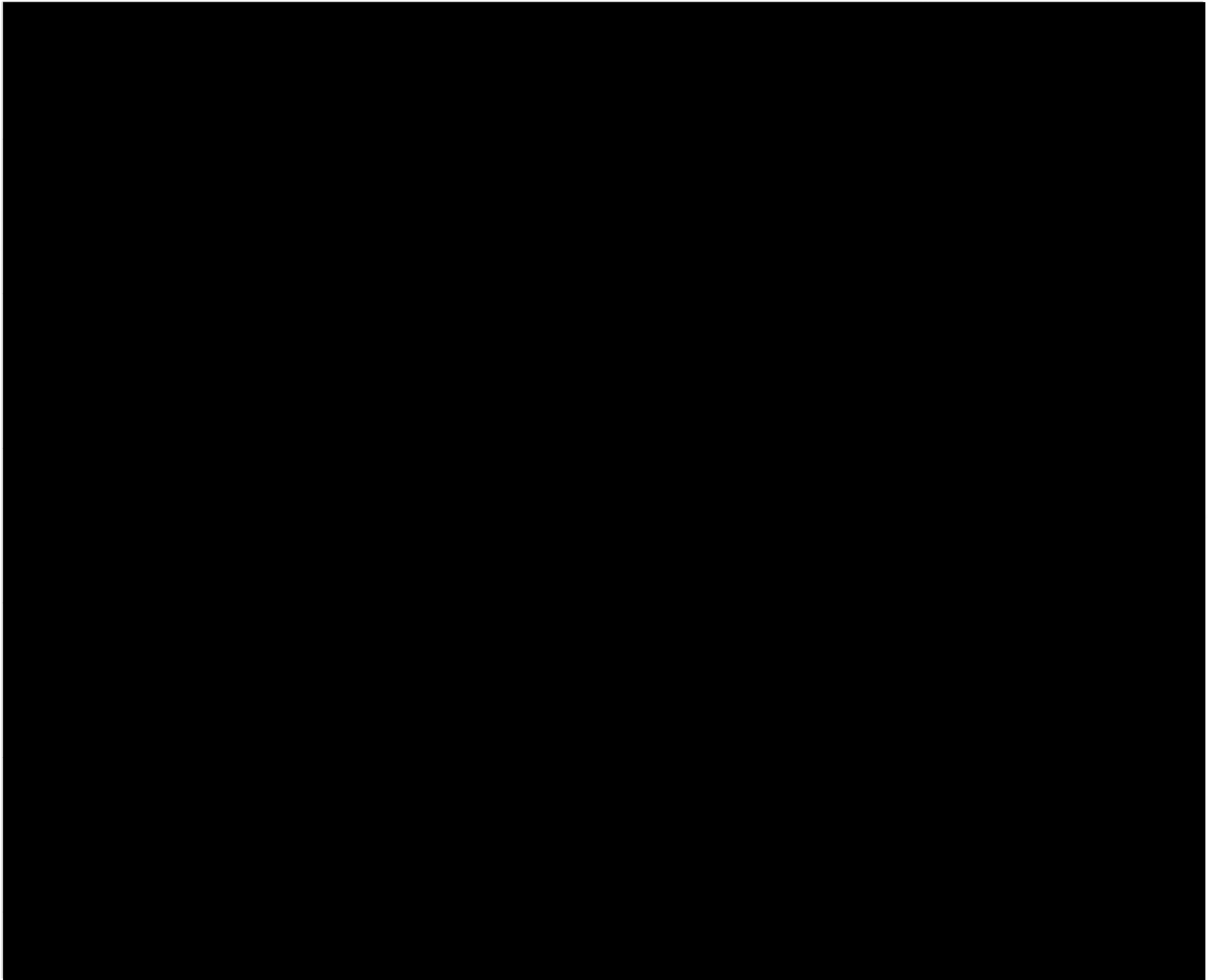
[redacted]

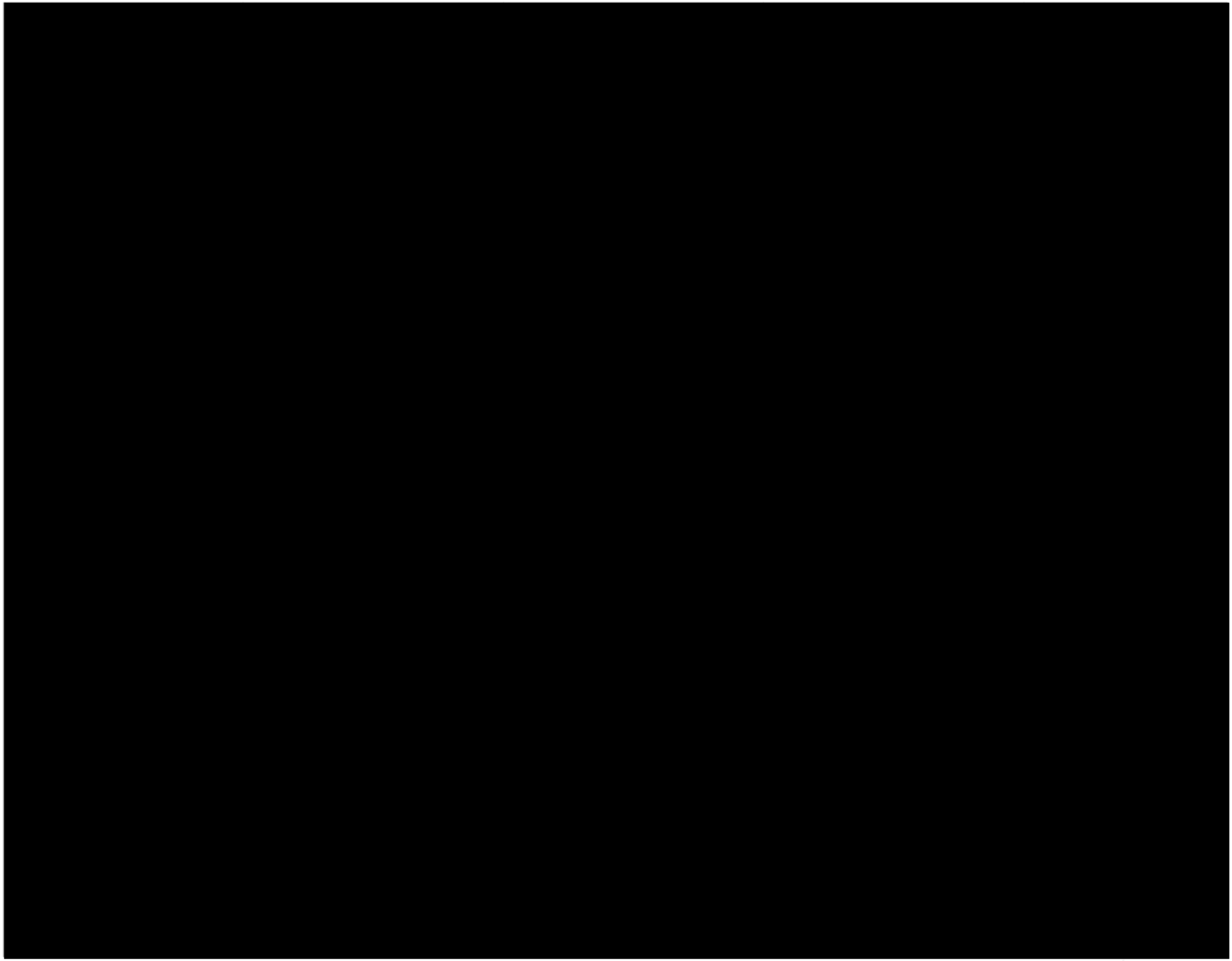
Completion Date: September 24, 2019
CEUs: .6 or 6 hours

President, National Fire Protection Association

IT'S A BIG WORLD. LET'S PROTECT IT TOGETHER.®







Smart Service:
Subcontractor Management

Unlike many facility services companies, The Budd Group is proud to self-perform a comprehensive offering of facility services; however, we understand that occasionally our customers' needs are best met by one of our vetted partners. Should the need to utilize subcontractors arise, we will comply with all subcontractor rules outlined by your organization, including providing the names and training records of all individuals who are or could provide services to this account (both self-performed and subcontracted individuals).

The Budd Group utilizes a supply chain management approach to meeting your facility needs. In doing so, we attempt to source all required services in-house. We would only look to outsource services when it is advantageous to the customer. Outsourcing typically occurs due to unique or highly technical time-sensitive requirements. The following page includes an overview of our supply chain management approach and our guidelines for managing subcontractors.

Engaging Subcontractors
The Budd Group would first identify any current subcontractors utilized by your organization. Our team would review current agreements and scope and modify as needed. If additional subcontractors are needed, our team would contact our local subcontractor partnerships. The Budd Group has established an extensive network of subcontractors that provide various specialty services. Subcontractors are typically engaged through previous work performance, qualified referrals, and from the leading industry associations where The Budd Group is a member. The Budd Group also strives to develop a diverse base of subcontractors, and we constantly seek partnerships with minority certified service providers.

Subcontractor Orientation
All subcontractors must undergo an orientation process to enter into an agreement with The Budd Group. This process includes several interviews conducted by Budd Group managers. During this process, the Budd Group manager reviews the following checklist of items that must be validated to proceed to an agreement.

- ✓ Reference checks (minimum of three current clients)
- ✓ Credit check (Dun & Bradstreet report)
- ✓ Insurance check (must show adequate coverage for general liability and workman's compensation)
- ✓ Background checks, drug test results, and W-9s of all employees providing the service

The Budd Group specifies the following:

- ✓ To work properly, safely, and legally.
- ✓ To not further subcontract the work without consent.
- ✓ To verify the eligibility of their staff to work in the United States legally, and do the necessary background checks and drug tests as required by The Budd Group.
- ✓ To provide all documentation for review and audit of contract compliance.
- ✓ To provide required insurance coverage at all times and present The Budd Group with a current copy of their Certificate of Insurance



Smart Service:
Subcontractor Management

Management of Subcontractors

Our subcontractors' performance and quality control are managed directly by the assigned Budd Group Account Manager or Area Manager. All subcontractors are required to follow the same quality standards as The Budd Group. A performance audit is conducted at least once a quarter, where agreed-upon Key Performance Indicators are reviewed to measure the overall quality of the service provided. The Budd Group also utilizes risk management partners to assist us in safety and environmental compliance and to enhance our safety processes and awareness among our subcontractor partners. Safety audits are frequently performed at our sites to ensure we educate our staff and subcontractors in safe practices and customize training specific to each task and responsibility.



Smart Service:
Inventory Management

Program Summary

The ability to maintain appropriate inventory levels directly impacts the quality of services provided. The Budd Group team is well-versed in balancing budgets, cost of capital, and risk of downtime to develop an inventory management plan that is most effective for each client site we manage.

Our inventory management program focuses on identifying and managing defined par levels and vendors that can assure that our desired inventory levels can be maintained in a timely fashion.



Program Description

One key element of inventory management is ensuring that items used in stock are always predictable and that the procurement of unique items is clearly identified and easily expedited. Furthermore, warehouse organization and cleanliness are crucial.

Identifying Required Supplies/Materials

The first critical step in establishing an effective inventory management program is to clearly define the required supply types, their quantities, and storage locations. Our startup teams typically achieve this through site tours, review of past invoices, analysis of the CMMS database for maintainable assets, and vendor interviews. This thorough evaluation ensures an accurate understanding of inventory needs, forming a solid foundation for efficient and sustainable inventory management.

Clearly understanding what materials are required guides the selection of supply vendors, the development of budgets, the establishment of appropriate inventory levels, and the identification of organization and storage needs. Special attention must be paid to the parts required to keep the older, possibly obsolete, equipment operational. It is not ideal, but equipment is often maintained well past its intended useful life. Sourcing repair parts for this equipment is usually an art. The Budd Group procurement specialists are prepared to assist our onsite team in sourcing the supplies we need at Beaufort County Schools.

Inventory Levels

Inventory Management is critical to The Budd Group's facility management program. Our team understands the importance of maintaining proper inventory levels and the impact inventory levels have on an organization.



Smart Service:
Inventory Management

Inventory Levels Continuum



- Higher than required inventory levels
  - Poor utilization of funds
  - Increase risk of obsolescence
  - Ensures parts/supplies are available
  - Wasted storage space
- **Appropriate inventory levels**
  - **Effective use of funds**
  - **Mitigates the risk of obsolescence**
  - **Ensures parts/supplies are available**
  - **Effective use of storage space**
- Lower than required inventory levels
  - Poor utilization of labor; trips to the store
  - Mitigates the risk of obsolescence
  - Risks: parts/supplies are NOT available
  - Effective use of storage space

Each item required to maintain a site is evaluated to determine an appropriate inventory and reorder level. The frequency of use and the lead time for delivery are essential attributes to be considered when assigning reorder levels.

Delays related to identifying sourcing for supply/materials lead to unnecessary downtimes that must be mitigated to an absolute minimum.

Software supporting inventory management activities

The Budd Group often utilizes specialized software to manage inventory at our larger site locations simply due to the many items required to maintain a facility. The Budd Group team prefers to use "Brightly's Asset Essentials", as our CMMS and the "Inventory Management" module of this package, to manage our supply inventories.

Brightly's Inventory Management module is an effective web-based tool specifically designed to support inventory management. This tool is fully integrated into the "Asset Essentials" work order system, allowing a seamless flow of information between the two software modules. A significant benefit of the seamless flow of information is the facilitation of supply cost assignments to work orders and simultaneously reducing inventory. When used properly, inventory levels are adjusted in real time, triggering notifications to management when reorder points are met.



Smart Service:
Inventory Management

Annual inventory/disposal of obsolete items
Each summer, a complete inventory of all Beaufort County assets will be completed. The inventory will be completed jointly by the Budd Group managers/technicians and the CTE Interns scheduled to join the team each summer.

The main objective of the inventory includes:

- Reconciliation of on-hand inventory versus virtual inventory
- Identification of obsolete items; inducing proper disposal
- Assure the warehouse is orderly and clean

PROGRAM DESCRIPTION

- Real-time inventory levels
- Established par levels automatically notify management of items requiring restocking.
- Generation of Purchase Orders
- Reduction of trips to the local supplier for emergency supplies
- Effective use of funding
- Effective use of storage



Smart Service:
Help Desk

Program Overview
The primary focus of the Help Desk is to serve as a SINGLE point of contact for individuals requiring service. Communication with the community must be simple, direct, and efficient, ensuring that requests are addressed quickly and effectively.



Program Description
The Budd Group proposes to operate a Help Desk during typical business hours. The Help Desk will be a single point of contact for submitting requests and reporting status updates on requests received.

Our Help Desk personnel use Computer-Aided Maintenance Management System (CMMS) programs to track and manage virtually all departmental activities. Our responsibility is to ensure the full utilization of the CMMS, enabling easy analysis of all maintenance-related tasks. The CMMS will track the activities of the Budd Group team and monitor subcontractors providing relevant services, ensuring a comprehensive and efficient approach to facility management.
The Budd Group team will make submitting requests as seamless as possible. We are prepared to receive requests virtually using the most comfortable method for our clients.

Some of the more common methods for submitting requests are:

- Reach the help desk via **phone** @ 843-322-HELP
- Via **e-mail**
- Users can enter requests directly into a **"Web-based Service Requestor," which allows them** to enter requests directly into the CMMS.

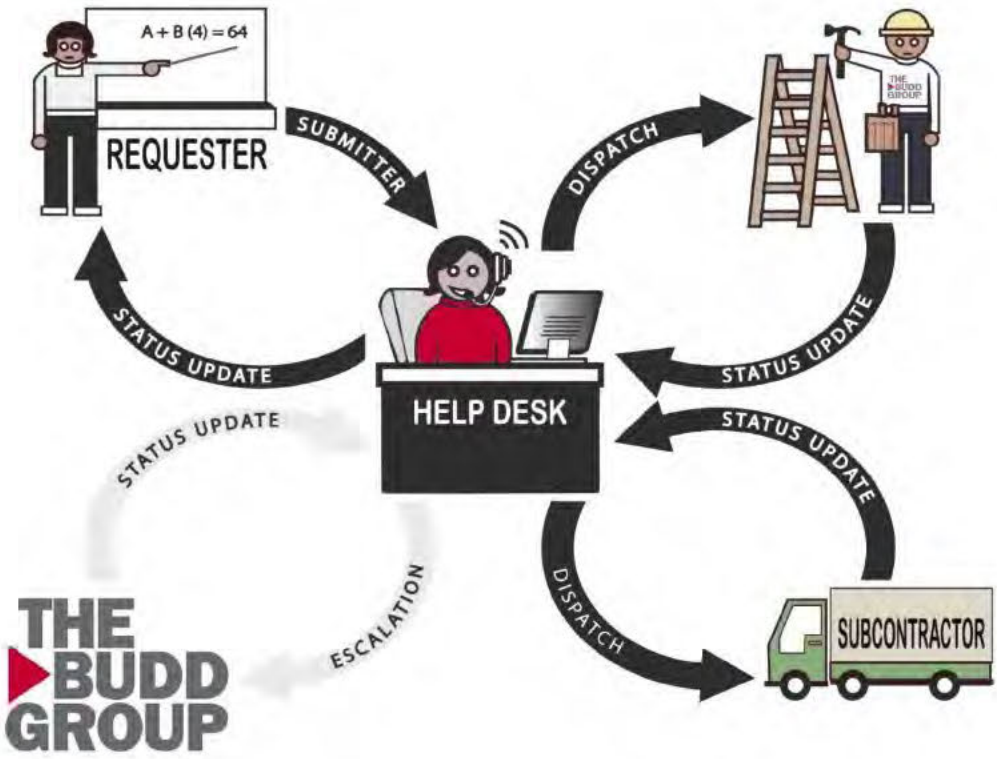
The appropriate technician and tools will be dispatched once the Budd Group Help Desk accepts a request. The Help Desk typically has the authority to determine which technician or subcontractor is best suited to complete the requested task without seeking further approvals. In cases where the Help Desk is unsure of the appropriate course of action, the issue will be escalated to The Budd Group Management Team, where further direction will be provided.

Another more critical function of the Help Desk is communicating status changes. **Requestors are simply due the common courtesy of being notified of changes in status related to services that have been requested.**

The Help Desk will serve as a single point of contact for the community when submitting requests and providing feedback on the status of requested work.



Smart Service:
Help Desk



The on-call maintenance team addresses emergency situations outside of regular hours. Site managers also participate in a rotation to provide secondary on-call support. The designated on-call manager can send out any technicians and required resources for more serious problems.



Smart Service:
Help Desk

Response time standards

Urgency	Response expectations	Completion expectations
Emergency Response e.g., plumbing, HVAC failure	Within 2 hours	Completion and/or update on work progress within 4 hours to COO and Facilities Support Manager
Urgent [High priority] e.g., electrical outages, severe leaks	Within 4 hours	Completion and/or update on work progress within 1 business day to COO and Facilities Support Manager
Routine [Medium-Low] e.g., painting, general repairs	Within 2 business days	Completion within 5 business days

Program Benefits

- Single point of contact for submitting facilities-related services
- Welcoming and friendly conduit for information
- Authority to dispatch the appropriate resources (labor, tools, supplies, etc)
- Informs requestors on the status and/or change of status of their requests
- Records and tracks all labor and materials utilized for each task completed
- Dispatch and track Preventative Maintenance Work Orders
- Duplication of work orders is minimized
- The work of subcontractors is monitored and tracked in CMMS
- Historical Work Order and Preventive Maintenance data collection and archiving



Smart Service:
Emergency Response

Program Summary



The Budd Group recognizes the demanding, 24/7 nature of Facilities Management. The clients we serve can be assured that our teams understand that our top priority is to support your school in times of crisis.

Program Description

Our team is committed to responding to adverse conditions when they occur.

The following list describes how The Budd Group will provide service in abnormal conditions:

- Develop contingency and emergency preparedness plans to support students, faculty, and staff safety in partnership with the community. Plans will clearly describe the tools, equipment, and human resources required to support the institution during adverse conditions.
  - The Budd Group Account Manager will serve as the first point of contact during emergencies related to the facility's operation *(equipment failures, alarms, storms, floods, roof leaks, fire, etc).*
  - A schedule of on-call The Budd Group personnel will be provided to the Administration.
- All The Budd Group personnel expected to respond to emergencies will be equipped with e-mail-enabled smartphones allowing constant communication. These contacts are as follows:

Typical Emergency/Disaster Procedures

- The Budd Group maintains operational readiness during disaster scenarios, even with utility disruptions.
- Upon notification of an emergency, a The Budd Group representative will:
  - Respond to the client and The Budd Group management
  - Assess the situation, review correction and safety protocols,
  - provide a timeframe for resolution, and oversee corrective procedures.
- A The Budd Group representative will provide a detailed cost estimate for non-critical situations upon request.
- The Budd Group has a single, dedicated emergency contact number available 24/7.
- The Budd Group initiates emergency response within thirty minutes of notification during work hours.
- The Budd Group initiates emergency response within one hour of notification outside work hours.

In emergencies, the **Budd Group team will be there to help**. We are part of your team, and we will do **whatever** we can to support Beaufort County Schools.

Program Benefits

- Assurance that The Budd Group team will be available in a crisis.



Smart Service:
Emergency Response

- Assurance that The Budd Group team has developed contingency plans to ensure a prompt response.



Smart Service:
Building Information Card (BIC)

Program Overview



The Budd Group team believes one of our key deliverables is the creation of the Building Information Card (BIC) for each facility we oversee. The BIC is a concise and straightforward manual that **provides a quick snapshot of each building's critical components and unique operational protocols.** Nothing could be more important in times of crisis, and information is vital.

As our team builds the BICs for each school, we will perform the request building assessments. Our findings will be shared with the Beaufort Schools operations team so they can plan accordingly.

Program Description

The BIC manuals can be viewed as a triage manual for building maintenance. The manuals have been designed to facilitate quick and easy access to the location of utility cut-offs and contact information in the event of a building failure.

We want to assure that the response time during building-related failures is kept to an absolute minimum. The Budd Group sincerely believes the best tool in the industry to support this objective is our BIC manuals. The BIC concisely describes all utility cut-offs, electrical disconnects, plumbing isolation valves, and the like for the responding technicians. Quickly isolating a water leak or de-energizing a hazardous electrical issue can exponentially mitigate the potential damage that could occur. Suppose a situation is too large for the technicians who responded first. In that case, the contact information will notify emergency personnel, managers, utility companies, or specialty technicians in an escalation process.

The second primary function of the BIC manuals is to provide the Budd Group Managers and Technicians with information related to the unique characteristics of the building systems. This information is invaluable for technicians regarding unusual startup and/or shutdown procedures related to the building's equipment. BICs have also served as a great location to record institutional knowledge previously known only by senior staff members. Historical knowledge can often be priceless!

BICs have proven to be valuable resources to emergency responders and site operators. We believe the Budd Group BIC is an industry-leading Best Practice.



Smart Service:
Building Information Card (BIC)

Typical Emergency/Disaster Procedures
Each Building Information Card manual typically consists of the following elements:



- Building Description
  - Name
  - Location
  - Date of Construction
  - Date and scopes of Renovation Projects

- Contact Information Related to Facilities
  - Client Contact Information
  - The Budd Group Contact Information
  - External Contact Information *(including contracted services)*

- Location of **Emergency Disconnects**



- Building Continuity Equipment and Location
  - Life Safety Equipment Descriptions
  - Generator Descriptions
  - HVAC Systems Descriptions
  - Unique Startup / Shut Down Procedures

PROGRAM BENEFITS

- Improved safety for building occupants (students, staff, faculty, and/or guests)
- Improved reaction time responding to building failures
- First responders' access to potentially critical information





Smart Service:
Building Information Card (BIC)

THE BUDD GROUP
Great People ▸ Smart Service

Building Information Card

School Name:	
Building Name:	



[Client Logo Here]

Date of last update	



Smart Service:
Building Information Card (BIC)

Table of Contents

INTRODUCTION
BUILDING OVERVIEW
ONSITE CONTACT INFORMATION
EXTERNAL CONTACT INFORMATION
DESCRIPTION OF LOCATIONS OF UTILITY SERVICES AND CUT-OFFS
LINE DRAWINGS OF LOCATIONS OF UTILITY SERVICES AND CUT-OFFS
BUILDING MAJOR RENOVATION LOG

Introduction

The Building Information Card consolidates basic building information into a single document.

Audience: Building Manager, Principal, First Responder, Maintenance Technician

Objective: Provide high-level information that supports the first response to a building emergency by providing information on energy sources, location of cut-off valves, and similar information

Building Overview

Attribute	Description
Building Address / Number	
Building Usage	
Year Built	
Number of Floors	
Square Footage	
Electrical voltage(s)	
Heat fuel type(s)	
Water source(s)	
Waste water system(s)	
HVAC System Description	
Generator / UPS	
Elevator(s)	



Smart Service:
Building Information Card (BIC)

Onsite Contact Information

Title	Name	Phone	E-mail
Campus Police / Life Safety			
Director of Facilities Management			
Director of Maintenance			
Director of Custodial Services			
Director of Grounds Services			
Building Manager			
Office Manager			

External Contact Information

Function	Company Name	Contact Name	Phone Number	E-Mail
Natural Gas Provider				
Water Provider				
Electricity Provider				
Fire Panel Service				
Alarm System Monitoring				
Generator Services				
Elevator Services				

Description of Locations of Utility Services and Cut-offs

Electrical Service (Main Panel, Sub-Panels, etc.)		
Description	**Floor**	**Area**



Smart Service:
Building Information Card (BIC)

Fuel (Main, Cutoff Valves, etc.)		
Description	Floor	Area

Water (Main, Cutoff Valves, Fire Pumps, etc.)		
Description	Floor	Area

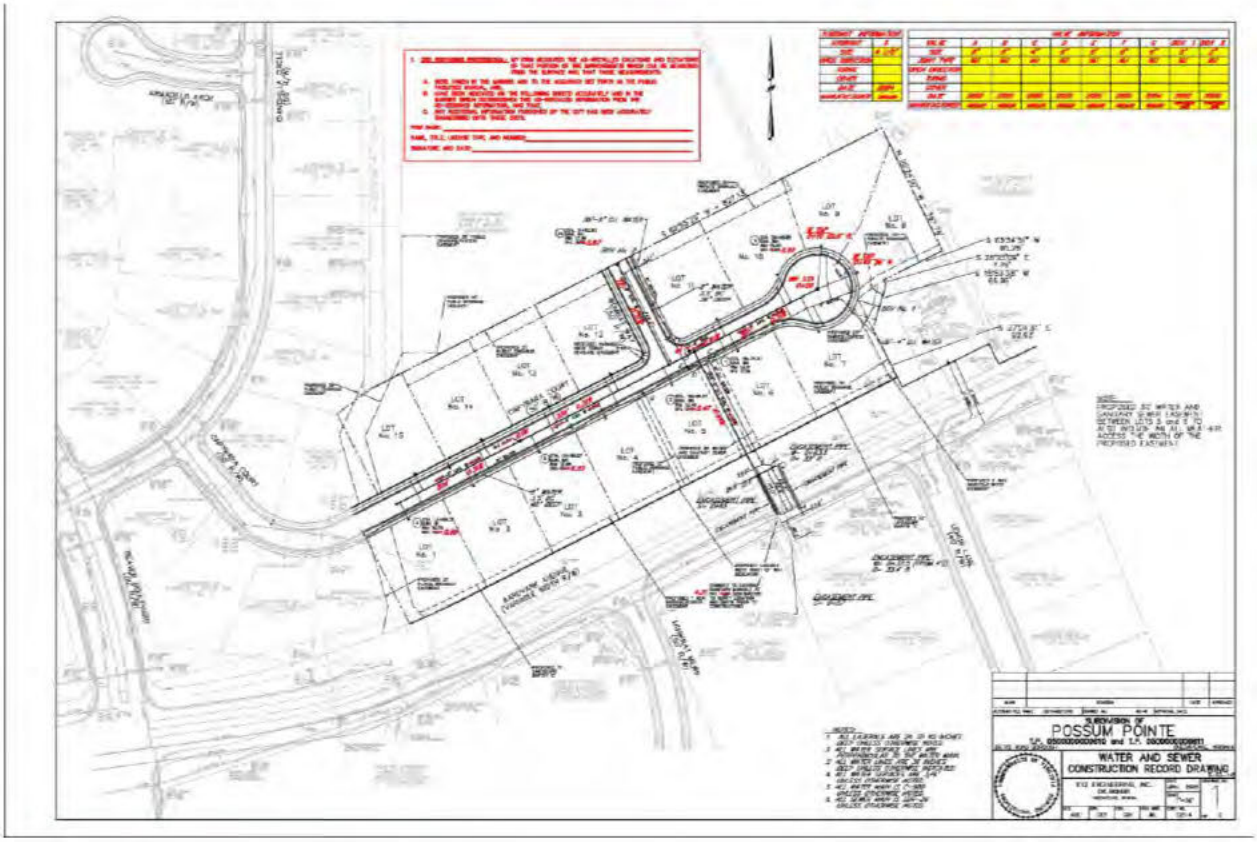
Fire Monitoring / Suppression Systems (Main, Sub-Panels, etc.)		
Description	Floor	Area

Generators / UPS		
Description	Floor	Area



Smart Service:
Building Information Card (BIC)

Line Drawings of Locations of Utility Services and Cut-offs



Building Major Renovation Log

Year	Area of Bldg.	Description

Smart Service:
Event Management

Event Support

Many facilities services providers underestimate the responsibility of managing Special Events. The Budd Group's extensive experience serving dozens of schools provides our team with incredible insight into the demands related to managing special events.

The Budd Group is prepared to support all the school-based events, including:

- Board Meetings
- Commencement Ceremonies
- Athletic Events
- School Plays
- Other similar School Events

The importance of successfully supporting and producing Special Events can **NOT** be overstated. Many of the events that occur in our schools are once-in-a-lifetime moments for students, families, and other guests.







Smart Service:
Event Management

Program Description

Logistics of Managing Special Events
Proactive management of special event logistics is crucial to ensuring optimal experiences for event planners and attendees. The Budd Group's Help Desk will be the central point of contact for all Facilities Management needs, including those concerning Special Events. This centralized approach will ensure a consistent method for the campus community to submit work requests.

The Budd Group's role as a single point of contact differs slightly depending on the services we are providing at any given site

Once a work request is approved, the Help Desk assigns WORK ORDERS to all the individuals/departments supporting the function. Whenever possible, the Help Desk will utilize a Computerized Maintenance Management System (CMMS) to manage and track activities required to support Special Events.

Utilizing a CMMS facilitates the consolidation and summary of all the resources used for each occurrence if the school administration desires to invoice/charge the requesting party.

Departments Supporting Special Events
Successful Special Events typically require the coordination of individuals who represent various departments. *Examples of some of the departments and the tasks* involved in supporting Special Events are outlined below:

Maintenance Operations
1. Lighting, Heating, and Air Conditioning will be scheduled to function during Special Events. These systems are often set to "unoccupied" mode to save energy.
2. Maintenance technicians and management will verify that event spaces are appropriately maintained and mechanical systems are fully functional.
3. Maintenance technicians and management may be assigned to be on-site and available during select Special Events.

Custodial Operations
1. Custodial Technicians will be scheduled to clean and stock areas being utilized before Special Events.
2. Before Special Events, custodial Technicians will set up tables, chairs, risers, stages, etc.
3. At the end of special events, Custodial Technicians will remove tables, chairs, risers, stages, etc.
4. Custodial Technicians will be scheduled to clean and re-stock impacted areas at the end of Special Events.





Smart Service:
Event Management



Grounds Operations, if applicable

1. Grounds Technicians will check parking lots and grounds adjacent to buildings before Special Events.
2. Grounds Technicians will strip and prepare athletic fields when applicable.



Food Services Operations, if applicable

1. Food Service Technicians will set up food, snacks, and/or drinks on time.
2. Food Service Technicians will remove perishable items promptly.
3. Food Service Technicians will promptly remove dishes, glasses, serving utensils, table skirts, etc.



Security Operations, if applicable

1. Security will unlock exterior doors and interior areas that are required to be accessible before special events.
2. At the end of the Special Event, school security will lock all exterior and interior areas accessed, ensuring the safety and security of the building.

Breaking down Special Event venues and adjacent areas is a crucial task that is often overlooked but is, in many ways, more important than the preparation and set-up. Timely breakdown and cleanup are essential to effectively managing a school district's Facilities Department. Ensuring this process is executed efficiently helps maintain the integrity of the facilities and supports the smooth transition to the next event or daily operations.

Program Benefits

- Single point of contact for the campus community
- Communication to all associated departments
- Ensure event venues are prepared adequately on time
- Assure event venues and surrounding areas are properly broken down, cleaned, and prepared for business.

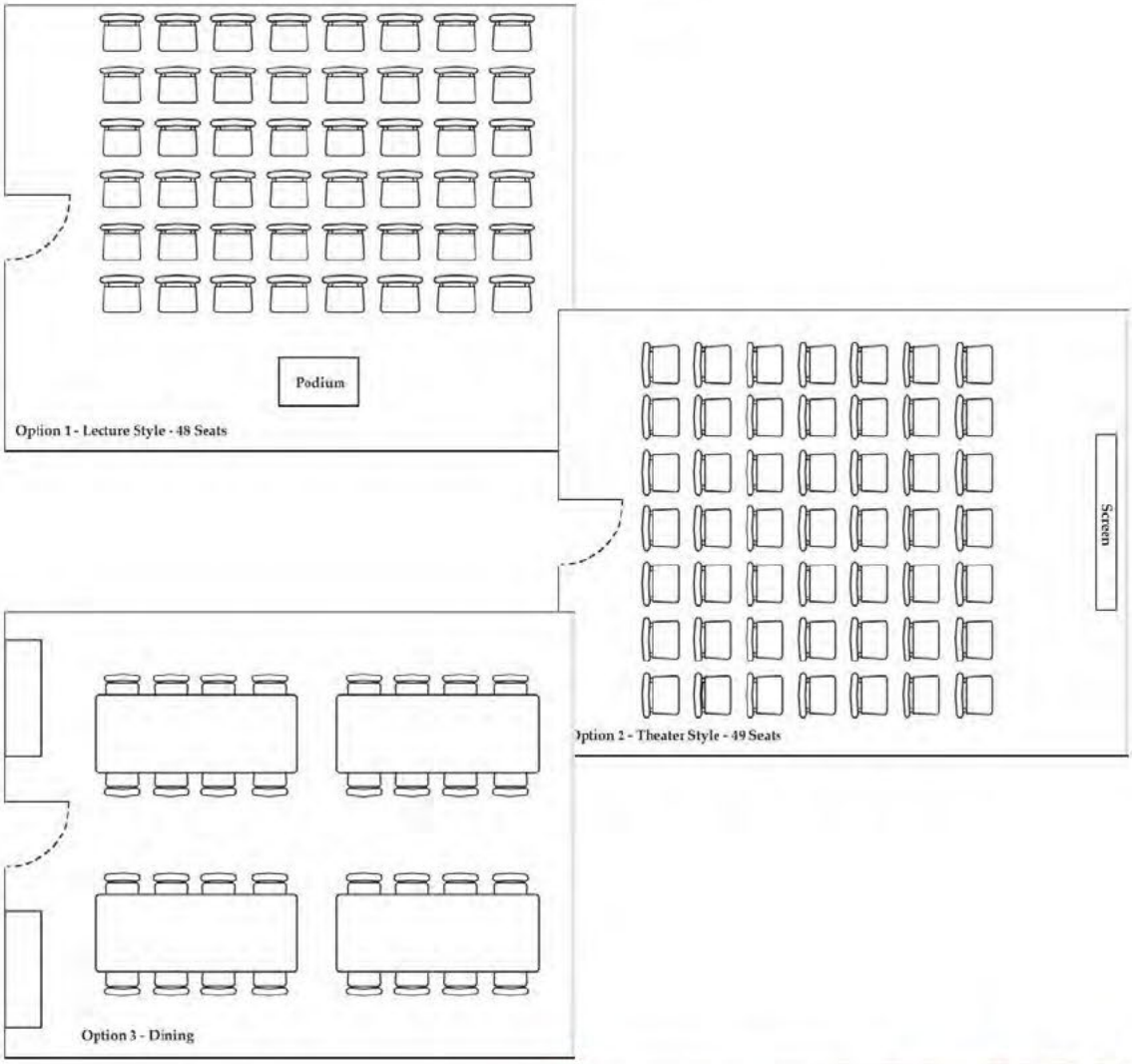
Smart Service:
Event Management

Best Practice

To facilitate effective communication regarding configurations related to special events, we have developed several standard room setup configurations at locations we manage. The "Standard Room Configurations" can be easily posted on a webpage for reference. Laminated, sometimes framed, copies of the "Standard Room Configurations" can be posted in the meeting event space.

Utilizing "Standard Room Configurations" facilitates easy and accurate communication of expectations.

Illustrations of sample "Standard Room Configurations"



Statement of Intent

We, the undersigned have prepared and submitted all the documents required for this project. We have prepared these documents with a full understanding of the Beaufort County School District's goal to ensure equal opportunities in the proposed work to be undertaken in performance of this project. Specifically, the BCSD seeks to encourage and promote on an inclusionary basis contracting opportunities without regard to the race, gender, national origin or ethnicity of the ownership or management of any business and that it is an equal opportunity employer and contracting entity. We certify that the representations contained in the Minority/Woman Business Enterprise (M/WBE) Utilization Report, which we have submitted with this solicitation, are true and correct as of this date. We commit to undertake this contract with the Minority/Woman Business Utilization Report we have submitted, and to comply with all non-discrimination provisions of the Minority/Woman Business Enterprise Program in the performance of this contract.



names, addresses and contact persons of the M/WBE and majority owned businesses, if any, to be used in the contract, the type of work each business will perform, the dollar value of the work and the scope of work. The Utilization Report submitted by the Contractor shall be submitted as a part of the contract with BCSD. If the information contained in the Contractor's Utilization Report changes by the time the contract is executed, the Contractor shall amend the Utilization Report and such amended Utilization Report shall be incorporated into the contract.

Business Enterprise Utilization Report

Not Applicable

List all vendors/subcontractors to be used on this project. All MBEs or WBEs proposed for utilization on this project must be certified by the Small and Minority Business Assistance Office through the State of South Carolina according to the criteria of the Beaufort County School District's Minority Business Enterprise Plan prior to utilization on this project.

In column 2 below, please specify ethnic/racial/gender group as follows:

- AABE – African-American Business Enterprise
- HBE – Hispanic Business Enterprise
- ABE – Asian-American Business Enterprise
- WBE – Woman Business Enterprise

Sub-Contractor Name	Gender Group	Address	Phone #	Other	E-Mail

Unlike many facility services companies, The Budd Group proudly self-performs a wide range of facility services. As with the custodial services contract, The Budd Group will self-perform all facility maintenance management services outlined in this RFP. However, we will always leverage our vetted partners when it best serves BCSD's needs.

When subcontracting is necessary, we fully comply with all client requirements, including submitting names and training records of both our employees and any subcontracted personnel. Our supply chain management strategy prioritizes in-house service delivery. We only outsource when it benefits the customer—typically for specialized, technical, or urgent needs. More information about our supply chain approach and subcontractor management guidelines will be provided upon request.

Great People:
Student Employment Program

Program Overview
The Budd Group has developed an internship curriculum to support the Student Employment Program for Beaufort County School District. As a ***family-owned and operated business,*** we understand the importance of passing the baton to the next generation. It seems natural that the local Budd Group team helps foster the community's youth. The Budd Group plans to employ two (2) interns for the SEP each summer. Interns will be exposed to a program designed to expose them to real-life scenarios that will enrich their academic curriculum.

Nelson Sirin, the Area Vice President of Operations, will be the main point of contact for The Budd Group to spearhead and implement this program.

Program Description
The Budd Group's 6-week SEP internship program, running 4 hours daily, is thoughtfully structured to align with each intern's age and educational goals. We prioritize providing insights into the essential business operations of the facilities management industry.
Each intern will be exposed to will have exposure to real-life circumstances that reinforce their learning in the following categories:

- Architecture & Construction
- Business, Management & Administration
- Education & Training
- Finance
- Marketing, Sales, and Service

Recruiting and Hiring
The Budd Group is committed to providing valuable internship opportunities for students in the Beaufort County School District (BCSD) through a targeted recruitment strategy in collaboration with the district's Career and Technical Education (CTE) departments. Our approach to recruiting interns will include:

- **Collaboration with BCSD:** We will work closely with BCSD's Career and Technical Education (CTE) departments to promote internship opportunities through district communication channels, including school newsletters, CTE program announcements, and career services. This will ensure the opportunities are effectively communicated to the target student audience.

- **Targeted Outreach:** We will provide BCSD with clear and concise internship descriptions highlighting the learning opportunities, alignment with CTE fields, program duration, compensation, and eligibility requirements.





Great People:
Student Employment Program

- **Online Application Process:** Interested students can apply for internship positions through The Budd Group's online portal, ensuring a streamlined and accessible application process.

The Budd Group's hiring process for interns will be designed to identify motivated students with a strong interest in gaining practical experience in the facilities management industry. The process will include:

- **Application Review:** Applications will be reviewed based on criteria such as the student's interest in relevant Career and Technical Education (CTE) fields, related coursework or projects, enthusiasm for learning, and basic communication and teamwork skills.
- **Interviews:** Promising candidates will be invited to participate in interviews conducted by The Budd Group's team members.
    - Interest in the facilities management industry and their chosen CTE pathway.
    - Willingness to learn and take initiative.
    - Basic communication and interpersonal skills.
    - Work ethic and responsibility.

Offer and Onboarding: Successful candidates will receive a formal offer letter outlining the internship terms, including start and end dates, hours, pay rate, and a program overview. Upon acceptance, interns will participate in a student-oriented onboarding process that includes introductions to the team and an overview of relevant company policies (with a strong emphasis on safety).

Training

The Budd Group's approach to training is centered on developing competent and safety-conscious maintenance professionals. Our training methodology for the Student Employment Program will be adapted to provide interns with a comprehensive introduction to the facilities management industry, emphasizing practical skills and safety awareness within the 6-week timeframe. We will leverage key elements of our established training programs, focusing on hands-on experience, mentorship, and targeted learning modules to ensure interns gain valuable knowledge and skills.

To achieve these objectives, the following training methods will be employed:

- **Hands-on Training and Shadowing:** Interns will work alongside experienced maintenance technicians, actively participating in daily tasks and observing best practices. This will provide practical experience in real-world settings.
- **Structured Learning Modules:** Interns will engage with relevant modules from The Budd Group's training resources, covering essential topics such as:
    - Workplace safety and OSHA guidelines
    - Introduction to maintenance tools and equipment
    - Preventive maintenance procedures
    - Basic troubleshooting techniques
- **Simulations:** Where appropriate and available, interns will utilize simulations to develop skills without risk.



Great People:
Student Employment Program

- **Mentorship and Direct Instruction:** Experienced technicians and supervisors will serve as mentors, providing direct instruction, guidance, and feedback to interns throughout the program. This one-on-one interaction will ensure personalized learning and support.

The following is a detailed outline of how training topics and activities will be structured throughout the 6-week internship, aligning with the provided weekly schedule and incorporating relevant elements from The Budd Group's training resources:

- **Week 1: Introduction to Facilities Management and Safety**
  - **Topics:**
    - Introduction to Facilities Management principles and practices.
    - Importance of workplace safety, including OSHA 10 Construction Safety Training.
    - Overview of staffing and scheduling, including an introduction to APPA standards.
  - **Training Activities:**
    - Orientation to The Budd Group and the facilities management industry.
    - Interactive session on safety protocols, hazard identification, and PPE.
    - Introduction to basic staffing and scheduling concepts.
    - Shadowing experienced staff to observe daily operations.
  - **Learning Objectives:**
    - Understand the core functions of facilities management.
    - Identify and mitigate workplace hazards.
    - Learn the fundamentals of staffing and scheduling in a maintenance environment.

- **Week 2: Computerized Maintenance Management System (CMMS) and Inventory Management**
  - **Topics:**
    - Introduction to Computerized Maintenance Management Systems (CMMS).
    - CMMS functions: dispatching work orders and generating reports.
    - Inventory management principles and best practices.
    - Introduction to the Beaufort School assets inventory project.
  - **Training Activities:**
    - Hands-on training with a CMMS, including practice in dispatching and reporting.
    - Structured learning module on inventory management principles.
    - Participation in the Beaufort School assets inventory project.
  - **Learning Objectives:**
    - Operate a CMMS to manage work orders and track maintenance activities.
    - Apply inventory management principles to a real-world project.
    - Develop skills in inventory control and asset tracking.

- **Week 3: Inventory Management Project**
  - **Topics:**
    - Continued work on the Beaufort School assets inventory project.
  - **Training Activities:**
    - Practical application of inventory management skills through the inventory project.
      - Collaboration with team members and mentors on project tasks.



- **Learning Objectives:**
  - Complete a comprehensive inventory of school assets.
  - Utilize inventory management tools and techniques.
  - Enhance teamwork and project management skills.

- **Week 4: Energy Management and Business Management**
  - **Topics:**
    - Introduction to energy management principles.
    - Energy conservation measures in facilities management.
    - Business management fundamentals, including budgeting and financial controls.
  - **Training Activities:**
    - Structured learning module on energy management and conservation.
    - Discussion of energy-saving strategies in a school setting.
    - Introduction to budgeting and financial reporting.
  - **Learning Objectives:**
    - Understand the importance of energy management in facilities.
    - Identify and implement energy conservation measures.
    - Gain a basic understanding of budgeting and financial controls.

- **Week 5: Sales and Marketing in Facilities Management**
  - **Topics:**
    - Introduction to sales and marketing concepts in a service industry.
    - Developing a value proposition for facilities management services.
    - Basic pricing strategies.
  - **Training Activities:**
    - Interactive workshop on developing a value proposition.
    - Case study analysis of pricing strategies in service contracts.
  - **Learning Objectives:**
    - Understand the role of sales and marketing in facilities management.
    - Develop a compelling value proposition for services.
    - Learn the basics of pricing service contracts.

- **Week 6: Professional Development**
  - **Topics:**
    - Resume best practices.
    - Mock interviews.
  - **Training Activities:**
    - Workshop on resume writing and formatting.
    - Mock interviews with feedback and coaching.
  - **Learning Objectives:**
    - Create an effective resume.
    - Improve interviewing skills and techniques.
    - Gain confidence in professional communication.



Great People:
Student Employment Program

Interns' progress will be monitored through:

- Direct observation by mentors and supervisors during hands-on activities.
- Participation in structured learning modules and discussions.
- Practical application of skills in assigned tasks and projects.
- Regular feedback will be provided to interns, both informally through daily interactions and formally through weekly reviews with their mentors.

Given the importance of safety in facilities management, interns will receive comprehensive safety training, including:

- OSHA 10 Construction Safety Training
- Personal Protective Equipment (PPE) training
- Safe work practices and procedures
- Hazard identification and prevention

Supervision and Support

The Budd Group will provide interns with structured supervision to support their learning and development throughout the program. Key supervision protocols include:

- **Daily Guidance:** Mentors/supervisors will provide clear task instructions and encourage questions.
- **Regular Feedback:** Daily check-ins and weekly formal feedback sessions focus on learning and improvement.
- **Mentorship Support:** Experienced staff will serve as mentors, offering guidance and expertise.
- **Progress Monitoring:** Interns' progress will be tracked through task completion and participation.
- **Issue Resolution:** Supervisors will promptly address any performance or behavioral issues.

Learning Points

This section outlines the key learning points for our Student Employment Program, focusing on the foundational knowledge, practical skills, safety awareness, and professional development that students will gain.

- **Understanding the Fundamentals of Building Systems:** Interns will learn how essential building systems operate firsthand. This includes items such as HVAC (heating, ventilation, and air conditioning), plumbing, electrical systems, and even fire safety systems. They'll move beyond simply seeing a vent or a light switch and start understanding the network and components behind them.





Great People:
Student Employment Program

- **Developing Practical Maintenance and Repair Skills:** The internship will offer opportunities to learn basic maintenance tasks and minor repairs. This could involve anything from changing filters and light bulbs to troubleshooting simple plumbing issues or assisting skilled technicians with more complex repairs. These hands-on experiences build valuable problem-solving skills and an understanding of how things work (and sometimes don't!).
- **Learning About Safety Protocols and Regulations:** Building maintenance is heavily regulated for safety. Interns will learn the importance of safety procedures, the proper use of personal protective equipment (PPE), and the regulations that govern building operations. This instills a crucial understanding of workplace safety that's transferable to any future career.
- **Appreciating the Importance of Preventive Maintenance:** Interns will see how regular maintenance is crucial for preventing bigger problems down the line. They'll learn about schedules for inspections, lubrication, and other routine tasks that keep a building running smoothly and efficiently, saving time and money in the long run.
- **Gaining Professionalism and Teamwork Skills:** Working alongside experienced maintenance professionals will expose interns to a professional environment's daily routines and demands. They'll learn about communication, teamwork, following instructions, and the importance of being reliable and responsible in a real-world job setting. This experience can significantly contribute to their professional development.

Student Employment Program Graduates

The Budd Group proposes extending our partnership with the SEP program beyond offering internship opportunities. We would also like to be considered a preferred employer of SEP graduates. It would be our honor to train and develop the next generation of maintenance technicians in conjunction with Beaufort County School District's program.

Protecting Minor Employees

The safety of our employees is of utmost importance. The Budd Group will adhere to all regulations of the South Carolina Department of Labor, Licensing and Regulation (SC LLR), the South Carolina Department of Health and Environmental Control (SC DHEC), and the Occupational Safety and Health Administration (OSHA) concerning the employment of minors. For participants under the age of 18, supervision by two adults is mandatory. However, individuals aged 18 and above are not subject to this requirement.





Smart Service:
Safety

The Budd Group makes safety a priority! From management and sales to implementation and operation, we endeavor to promote awareness and a "safety-first" approach to each aspect of our business. We believe striving for this kind of safety culture is the only way to achieve our Brand Promise: *Great People Delivering Great Experiences to Customers and Each Other*. Therefore, we aim to send every employee home from work the way they arrived.

To accomplish this goal, we have employed the following programs and initiatives:

- **B.U.D.D. SAFE Program:** This program is designed to shift our safety efforts to identify the behaviors leading to accidents. We then train employees to self-trigger on these behaviors and make different decisions accordingly.
- **Account Manager Certification:** Our manager training takes each account manager through a one-year training matrix that certifies them in various safety programs and equips them to train their employees.
- **Employee Training:** Our custom training is focused on OSHA Compliance, site-specific hazards recognition, and unsafe behavior recognition under the umbrella of our B.U.D.D. SAFE philosophy. We would also provide training on topics such as lockout/tagout, ladder safety, and bloodborne pathogens.
- **Employee Recognition Program:** The Safety Leadership Team and executive team members frequently select and recognize employees for outstanding safety habits and behavior.
- **Partners & External Resources:** We have partnered with several external resources to bolster our internal safety efforts.
- **Dedicated Internal Resources:** Our corporate Safety Manager, Joel Crotts, has the CSP (Certified Safety Professional), CHST (Construction Health and Safety Technician), and OSHA 500 (OSHA Construction Industry Instructor) credentials.
- **Safety Leadership Team:** Our Safety Leadership Team (SLT) meets to discuss initiatives and develop action plans. It includes employees from all lines of business and members of our executive team.
- **Cloud-based Safety Portal:** Our Safety Portal helps us track and access safety information more quickly, store it more efficiently, and share pieces of it with our managers so that they can tailor their strategies to fit their employees' needs.
- **Safety Inspections and Audits:** Our managers require monthly safety inspections, and our SLT randomly audits job sites to provide external accountability.
- **Annual Employee Safety Perception Surveys:** We recognize that employees' thoughts drive their behavior, so we use safety surveys to capture employees' perceptions of their job safety and our safety program.



Great People:
Diversity, Equity and Inclusion

Diversity, Equity, and Inclusion Statement: *The Budd Group embraces a diverse, equitable, and inclusive culture as a God-honoring company. We lead with our values and beliefs to enable our fellow employees to bring their whole selves to the workplace and develop their potential. We draw on our differences, what we've experienced, and how we flourish together to make The Budd Group a company of excellence. We are Good alone, but together we are Great.*

The Budd Group values and respects every individual and has created a culture that supports high ethical standards. We are committed to a work environment in which all individuals are treated with respect and dignity, and we endeavor to provide a professional atmosphere that promotes equal employment opportunities and prohibits discriminatory practices. As a part of our commitment to provide an inclusive work environment, we have developed diversity awareness programs to help team members learn about cultures outside of their own to mitigate misconceptions, encourage acceptance, and bring teams closer together.

Manager of Diversity and Inclusion
As part of The Budd Group's commitment to diversity, equity, and inclusion, we have hired Portia Hall as our Manager of Diversity and Inclusion. Portia designs and implements our D&I employee experience roadmap in this leadership role. Using a data-driven approach, Portia creates positive change and employee experiences by providing strategic and daily operational leadership and support on diversity, inclusion, and engagement policies, programs, training, and practices for our organization.

Portia is a trusted partner to our senior leaders, employee groups, and the field operations and leadership team for developing strategy and implementing initiatives to gain optimal attraction, development, and retention of diverse talent. In this highly collaborative role, Portia is critical in developing, driving, and communicating our D&I strategy at The Budd Group. Other elements of her role include recruiting, HR, and employee retention responsibilities and steering inclusion and engagement efforts.

As Manager of Diversity and Inclusion, Portia is responsible for:

- Ensure a holistic recruiting program, including an internship program, and leverage relationships with HBCUs and university affinity groups.
- Managing, developing, training, and fostering an inclusion and diversity roadmap with a focus on achieving measurable, sustainable results
- Partnering with leadership teams to design and implement change initiatives that foster a culture of inclusion and drive employee engagement
- Organizing and managing a diversity and inclusion council
- Review, develop, and embed diversity and inclusion practices into our company policies, business, and recruiting process as needed to ensure alignment while tailoring for regional needs
- Evaluating and advising on supplier diversity
- Leveraging a suite of reporting and analytics to drive holistic and data-driven strategies
- Developing an employee experience communications plan that engages our workforce and reinforces our focus on being a great place to work



Smart Service:
Supplier Diversity

The Budd Group is not a MWBE company; however, our customers represent a wide range of industries, people, and locations, and we want this same level of diversity reflected in our supplier community. People are the primary component of our service delivery, and our associates and vendor partners are diverse. The Budd Group complies with all applicable state and federal laws prohibiting discrimination in employment based on race, color, religion, gender, national origin, age, disability, veteran status, or other prohibited criteria.

Delivering our services does not always require purchasing materials or equipment, but always relies on a skilled staff of individual contributors, technical professionals, and managers. The Budd Group is committed to seeking ways to make business opportunities available to minority-owned, women-owned, small disabled-owned, HUBZone, and small disabled veteran-owned businesses. To that end, The Budd Group participates in strategic partnerships and purchasing alliances that help our organization achieve our supplier diversity objectives. Although we do not have an MWBE classification, we utilize Tier 2 spending with MWBE suppliers primarily through specialty services, floor care, and chemical suppliers. We also provide documentation to verify these supplier partnerships and ensure we meet our customers' supplier diversity initiatives.

Commitment to Equal Employment Opportunities
The Budd Group values and respects every individual and has created a culture that supports high ethical standards. We are committed to a work environment in which all individuals are treated with respect and dignity, and we endeavor to provide a professional atmosphere that promotes equal employment opportunities and prohibits discriminatory practices, including harassment.

As an equal opportunity employer, The Budd Group provides employment based on personal capabilities and qualifications without discrimination due to race, color, religion, ethnicity, national origin, sex (including pregnancy), gender (including gender nonconformity and status as a transgender or transsexual individual), sexual orientation, age, physical, sensory, or mental disability, citizenship, genetic information, past, current, or prospective service in the uniformed services, marital status, familial status, membership or activity in a local commission, public assistance status, or any other classification protected by federal, state, or local law. This policy applies to recruitment, hiring, promotion, transfer, compensation, seniority, layoff, recall, demotion, discipline, discharge, and all other terms and conditions of employment.

The Budd Group expects that all relationships in the workplace will be business-like and free of bias, prejudice, and harassment. Harassment of any employee due to race, color, religion, ethnicity, national origin, sex (including pregnancy), gender (including gender nonconformity and status as a transgender or transsexual individual), sexual orientation, age, physical, sensory, or mental disability, citizenship, genetic information, past, current, or prospective service in the uniformed services, marital status, familial status, membership or activity in a local commission, public assistance status, or other classification protected by law is strictly forbidden.



Smart Service:
Supplier Diversity

Americans with Disabilities Act (ADA)
The Budd Group is committed to complying with all applicable provisions of the Americans with Disabilities Act (ADA). It is The Budd Group's policy not to discriminate against any qualified employee or applicant based on any terms or conditions of employment because of such individual's disability or perceived disability, so long as the employee can perform the job's essential functions, with or without reasonable accommodation. Consistent with this nondiscrimination policy, The Budd Group will provide reasonable accommodations to a qualified individual with a disability, as defined by the ADA, who has made The Budd Group aware of their disability, provided that such accommodation does not constitute an undue hardship on The Budd Group.

ADA Amendments Act (ADAAA)
The Budd Group also complies with the ADA, as amended by the ADA Amendments Act (ADAAA), and all applicable state and local fair employment practices laws. We are committed to providing equal employment opportunities to qualified individuals with disabilities. Consistent with this commitment, The Budd Group will provide a reasonable accommodation to disabled applicants and employees if the reasonable accommodation would allow the individual to perform the job's essential functions, unless doing so would create an undue hardship.

