

RFP OCLS-26-Elevator-001
Request For Proposal
Elevator Modernization and Maintenance Services for OCLS
General Information and Submittal Requirements

Issue Date: August 17, 2026

Due Date: October 15, 2026

PURPOSE:

The Orange County Library District, an independent special taxing district to the State of Florida, doing business as the Orange County Library System (LIBRARY), is soliciting sealed written proposals from Florida-licensed elevator contractor firms (herein referred to as FIRM or Proposer or Bidder) to provide professional elevator modernization and maintenance (SERVICES). The responses to this request for proposal (RFP) are to include the SERVICES and frequencies as identified in this RFP. Therefore, the Library seeks a FIRM to provide professional elevator modernization and maintenance and training, as detailed in this RFP. Copies of the Request For Proposal may be obtained from the LIBRARY's RFP Project Coordinator noted below or on the LIBRARY's web site <https://ocls.org/board-trustees/advertised-solicitations/>.

RFP PROJECT COORDINATOR:

To ensure that your Proposal is responsive, you are urged to request clarification or guidance on any issues involving this solicitation before submission of your response. Your communications concerning this RFP should be directed in writing to the RFP Project Coordinator listed below.

Name: Seth Spring, Consultant
E-Mail: OCLSBIDS@OCLS.Org

Proposers shall not contact any member of the LIBRARY or the LIBRARY's Board of Trustees (except as provided below) regarding this RFP until such time as a contract is awarded. All inquiries pertaining to this Request For Proposal must be directed in writing through the RFP Project Coordinator noted above.

Note: The LIBRARY has contracted with Lerch Bates to be the subject matter expert and will coordinate with them throughout the process.

ORAL INTERPRETATION:

No oral interpretation of this Request For Proposal shall be considered binding. The LIBRARY shall be bound by information and statements only when such statements are written and executed under the authority of the LIBRARY's Chief Financial Officer.

SOLICITATION ACCEPTANCE/REJECTION/CANCELLATIONS:

The LIBRARY reserves the right to accept or to reject any or all Proposals and to make the award to that FIRM who, in the opinion of the LIBRARY, will be in the best interest of and/or the most advantageous to the LIBRARY. The LIBRARY also reserves the right to reject the Proposal of any FIRM who has previously failed in the proper performance of an award or to deliver on time contracts of a similar nature or who, in the LIBRARY's opinion, is not in a position to perform properly under this award. The LIBRARY reserves the right to inspect all facilities and equipment of the FIRM in order to make a determination as to the foregoing. The LIBRARY reserves the right to waive any irregularities and technicalities and may, at its discretion, request a rebid. Award will be made to the lowest responsive and responsible FIRM as determined by the LIBRARY.

The LIBRARY reserves the right to request clarification of information submitted and to request additional information of one or more Bidders after the deadline for receipt of Proposals.

The LIBRARY reserves the right, and the Chief Financial Officer has absolute and sole discretion, to cancel a solicitation at any time prior to approval of the award by LIBRARY's Board of Trustees when such approval is required. The decision to cancel a solicitation cannot be the basis for a protest.

DRAFT CONTRACT:

A contract for professional elevator modernization and maintenance services shall be entered into after the successful FIRM is selected, including a schedule of monthly rates, service level agreements, quality control program, etc.

PROJECT OVERVIEW:

The LIBRARY is seeking one (1) firm to provide the modernization portion of the SERVICES and a five (5) year maintenance agreement. See Attachment A "LB Modernization" for complete list of requirements and specifications for the project.

The LIBRARY currently consists of a Main Library and sixteen (16) branch locations throughout Orange County, Florida. The awarded Firm will provide SERVICES at the Main Library located at 101 East Central Blvd, Orlando, FL 32801.

SCOPE OF SERVICES:

Overview of Services. The FIRM shall provide and or perform professional elevator modernization and maintenance services for the LIBRARY's Main Library located at 101 East Central Blvd, Orlando, FL 32801.

Specific Services. See Attachment A "LB Modernization" for a through detail of SERVICES to be delivered. See Attachment B "LB Maintenance" for when and where SERVICES are to be delivered.

The successful FIRM will furnish all the labor, services, materials, equipment, tools, supplies, chemicals, and all other things necessary for the timely and proper completion of the modernization and maintenance services required by the RFP.

The successful FIRM will, at all times, furnish sufficient skilled workers, materials and equipment to perform all work. All materials and equipment provided will be new, free from all defects, fit for the purpose for which they are intended, and merchantable.

As part of the overall project plan, the FIRM must develop a communication plan that ensures timely and appropriate generation, collection and dissemination of information to the Library's Contract Administrator or designee. In addition, the FIRM must provide periodic reporting and attend status meetings.

The FIRM must develop an implementation plan identifying the most efficient and effective approach to implementation based on the FIRM's experience.

The FIRM must develop a quality assurance plan to ensure the SERVICES delivered are acceptable to the LIBRARY and meet the RFP and Contract specifications.

INSTRUCTIONS TO FIRMS:

FIRMS or companies desiring to provide SERVICES, as described herein, shall submit Responses in one sealed package and clearly labeled "RFP OCLS-26-Elevator-001 Elevator Modernization and Maintenance for OCLS".

- Said package shall have the FIRM's company name and address listed on the outside of the package.
- Said package shall contain: one (1) original Proposal (clearly marked), four (4) copies (a total of 5 printed Proposals) and one (1) electronic copy on a USB drive for document management purposes. Electronic copy shall be in Microsoft Word or Adobe – the most recent software version.
- **Proposals shall be submitted no later than 3:00 P.M. local time, on Thursday, October 15, 2026 to:**

Orange County Library System
Attn: Kristopher Shoemaker, Chief Financial Officer
5th Floor Human Resources Reception Desk
101 East Central Blvd.
Orlando, Florida 32801

- If your response contains any information deemed confidential, in accordance with Chapter 119 of the Florida Statutes, provide an additional USB drive with a redacted version of your response labeled REDACTED. Electronic copy shall be in Microsoft Word or Adobe – the most recent software version.

- Respondents are cautioned that they are responsible for delivery to the specific location cited above. Therefore, if your Proposal is delivered by an express mail carrier or by any other means, it is your responsibility to ensure delivery to the above address and specifically to the 5th floor reception desk. The LIBRARY will not be responsible for deliveries made to any place other than the specified address and floor location noted above.
- The time and date for receipt of Proposals will be strictly observed. The LIBRARY shall not be responsible for late deliveries or mail delays. The date stamp and clock in the LIBRARY's 5th Floor Human Resources Reception Desk shall serve as the official authority to determine timeliness of the Proposal. FIRMs accept all risks of late delivery of mailed and hand delivered responses regardless of fault.
- Proposals received after the/ specified time and date shall be considered non-responsive and will be returned unopened. The decision to refuse to consider a proposal that was received beyond the date/time established in the solicitation shall not be the basis for a protest.
- Faxed or E-Mailed Proposals shall be rejected as non-responsive, regardless of where and when the fax or e-mail is received.
- All responses must be signed by an officer or employee having authority to legally bind the FIRM.
- All information submitted will become part of the project file and, unless otherwise exempt or confidential in accordance with Florida law, will become a public record. All responses and accompanying documentation will become the property of the LIBRARY and will not be returned.
- Any response may be withdrawn prior to the date and time the responses are due. Any response not withdrawn prior to the date and time responses are due, will constitute an irrevocable offer, for a period of ninety (90) days, to provide the LIBRARY with the services as specific in the response.

PRELIMINARY SCHEDULE:

These dates are estimates only and are subject to change by the LIBRARY.

Event	Date	Day	Time
Announcement of RFB	08/17/2026	Monday	10:00 A.M.
Mandatory Pre-Proposal Meeting *	08/27/2026	Thursday	10:30 A.M.
Site Inspections **	08/28/2026 – 09/14/2026	Friday - Monday	Request from Brian Dornbush
Question Submission Deadline	09/18/2026	Friday	3:00 P.M.
Question Responses Posted	09/25/2026	Friday	3:00 P.M.
RFB Package Due	10/15/2026	Thursday	3:00 P.M.
RFB Evaluated (Part 1 & 2)	10/16-30/2026	Friday - Friday	TBD
Final Evaluations Posted	10/30/2026	Friday	3:00 P.M.

Board of Trustee Approval (If Required)	11/12/2026	Thursday	6:00 P.M.
Tentative Date to Award Contract	11/16/2026	Monday	TBD
Contract Effective Date (Service Begins)	11/30/2026	Monday	7:00 A.M.

*** Any firm that does not attend the Pre-Proposal Conference will not be allowed to bid on this IFB.**

PRE-PROPOSAL CONFERENCE:

A Mandatory Pre-Proposal Conference will be conducted on Thursday, August 27, 2026 at 10:30 A.M. The meeting location is LIBRARY Main Branch, 101 E. Central Blvd., Orlando FL 32801, 5th floor, Human Resources Reception Desk. All interested parties are required to send a minimum of 1 and a maximum of 3 representatives to this mandatory meeting.

**** There will also be Non-Mandatory Site inspection for all six (6) elevators held August 28 – September 14, 2026. Site visits will need to be coordinated with Brian Dornbush, Facility Operations Department Head 407-835-7323. Bidders Are Cautioned Not To Talk To Library Staff Regarding the RFP. Bidders are not to interfere with Library operations.**

FIRM PRESENTATIONS:

Oral presentations will not be required for this RFP.

SHORTLISTS, AND PROTESTS:

The recommended short list of firms, ranked by score, highest to lowest, will be available upon request by interested parties by contacting the RFP Project Coordinator noted above for five full business days after the final evaluations are posted. Failure to file a protest to the LIBRARY's Chief Financial Officer by 5:00 PM on the fifth full business day after the final evaluation posting date shall constitute a waiver of protest proceedings.

SUBMITTAL INSTRUCTIONS:

The response to this RFP must be submitted on 8-1/2" X 11" paper, 12-point font, pages numbered, with headings, sections, and sub-sections that directly correlate/address specifically ALL required submittal information in their respective order identified below. Interested FIRMS must submit five (5) hard copies and one (1) electronic copy on a USB device. Electronic copy shall be in Microsoft Word or Adobe – the most recent software version. This Proposal shall be awarded to a responsible, responsive Bidder, qualified by experience to provide the work specified.

By submittal of a bid, the Bidder agrees that the LIBRARY shall make the sole determination as to whether or not sufficient experience and expertise exist and the Bidder's protocol is sufficient to achieve the desired results.

The Bidder shall submit the following information with the Proposal:

A. Title Page: Identify the RFP subject, name of FIRM, FIRM's address, phone and facsimile number, primary point of contact, primary point of contact's title, phone number, mailing address, e-mail address for receipt of notifications, and date of submittal.

B. Table of Contents: Provide identification of the material by section and by page number.

C. Letter of Transmittal: Briefly state the understanding of the FIRM regarding the work to be performed and make a positive commitment to perform the work within the specified time period.

Include the following:

- Type of business (sole proprietorship, partnership, corporation, etc.); and
- State of incorporation; and if the entity is a certified minority business
- Headquarters location and if any offices are located in the State of Florida; and
- Include the names and contact information of the persons who will be authorized to make representations for the FIRM; and
- Be signed by a representative who is authorized to contractually bind the FIRM and include the agent's title or authority.

D. Profile and Qualifications: Experience and qualifications of the FIRM and proposed project specific staff.

1. FIRM Organization Description: Give a brief history of the organizational structure of the FIRM, including the organization's date of inception, number of employees (both full time and part-time) and FIRM's web address. If the FIRM has a minority, women, and/or service-disabled veteran business status with Orange County Board of County Commissioners and/or the City of Orlando, provide a copy of said certification.

The FIRM shall provide photocopies to the LIBRARY of an occupational license showing the principal place of business and that all associated equipment is located physically within Orange, Lake, Seminole, Brevard, Polk or Osceola Counties in Florida. These licenses and certifications must be maintained throughout the life of the Contract. Copies of license(s) must be included in the bid package.

Submit proof, in the form of a business tax receipt or any other incorporation document that demonstrates that the company has been in business providing elevator installation and maintenance services for at least five (5) years.

FIRM shall provide a copy of its Florida State license to perform required SERVICES.

FIRM shall submit a copy of FIRM's quality assurance plan. Plan shall be applicable to the Scope of Services. Quality assurance plan shall include a detailed description of the training program provided to all employees and at what frequencies. Training records of all employees shall be made available to the LIBRARY's Representative upon request.

2. Previous Experience: In order to submit a response to this RFP, FIRMs must be experienced in providing elevator modernization and maintenance services for at least one public entity with at least 2 passenger and 1 freight elevators within the last 5 years. Provide current/past performance within the last five (5) years of the FIRM in successfully providing similar SERVICES. Indicate the specific services provided by the FIRM, number of elevators for the same client.

"Similar Projects" for the purposes of this Request For Proposal is defined as:

A contract that includes professional elevator modernization and maintenance services provided within the past five (5) years to an existing, and occupied, commercial or institutional (not residential) facility.

The Proposer shall ensure that the basic description of the similar project, including all required performance requirements and/or dimensions are *identified* and that the elements are adequately explained in the text. The description shall document how the particular element was performed in conjunction with the overall project. The mere listing of elements without specific details in the body of the description will negatively impact the scoring for the project.

Failure to identify the specific performance requirements and/or dimensions of the project to ensure it meets the similar project description shall negatively impact that project's score.

3. References: Provide at least three (3) references, including contact names, e-mail addresses and phone numbers, for SERVICES provided in the last five (5) years. The LIBRARY intends to contact client references listed by the FIRM in its response.

4. Key Personnel and Equipment: Provide biographies/resumes of proposed, Project Manager, Installation Technicians, Maintenance Supervisor, Quality Assurance Supervisor and all other key lead members of the staff/team that will be assigned to this effort. The biographies shall include their position, years of experience, tenure with the FIRM and similar successful projects relating to LIBRARY's requirements. Include an organization chart clearly identifying key personnel, their functional role, the firm they are employed by, and their primary work location.

The FIRM shall provide documentation to support their ability to successfully staff and manage multiple concurrent projects for the LIBRARY. Such documentation shall include:

- List of equipment and facilities available to do the work.
- List of personnel contemplated to perform the work, by name and title with years of experience. Include copies of relevant training received or provided by the Proposer. Installation and maintenance staff assigned to this contract shall have a minimum of two (2) years' experience performing similar work. Resumes must be provided for all management personnel.

- Personnel performing work shall be appropriately trained in elevator installation and maintenance to perform the work specified. Copies of license(s) must be included in the bid package. Training records of all employees shall be made available to the LIBRARY's Representative upon request.
- Description of the proposer's staffing and equipment resources available to service the LIBRARY's account, resources shall demonstrate capacity for multiple concurrent projects.
- Proposer shall submit a copy of Proposer's safety plan. Safety plan shall include, at a minimum, procedures for safe work habits, safe use of equipment, and personal protective equipment.

The use of employee leasing companies is not authorized under this contract.

5. Conflict of Interest: Indicate any potential conflicts of interest with the LIBRARY, including the LIBRARY's Board of Trustees.

6. Legal: Provide a list of all lawsuits by and against the FIRM and sub-contractors over the past five (5) years.

E. Scope of Services: Each response must address, at a minimum, a description of the FIRM's approach to providing the SERVICES detailed in Attachment A "LB Modernization". The FIRM must fully demonstrate they have the resources and schedule capacity to ensure a successful implementation by the targeted " Contract Effective Date ". Describe in detail the FIRMS quality assurance and training programs.

F. Additional Information: The FIRM may choose to provide any additional relevant information in this section. If there is no additional information to present, state in this section, "There is no additional information that we wish to present".

Required Forms:

- a. SUBMITTAL REEQUIREMENTS A – F ABOVE
- b. W-9 Form
- c. ELEVATOR SUPPLEMENTAL DOCUEMNTS
- d. BID SHEET, EXCEL (**in a sealed envelope**)

[End of Submittal Requirements]

SELECTION of FIRM(s):

FIRM responses shall be evaluated by a committee of at least three (3) LIBRARY employees and a representative from Lerch Bates based on the information provided in the sealed bid package for subsequent contract with the qualified responsive and responsible FIRM. The

FIRMs will be scored based on their overall qualifications and cost combination. Thus, the best qualified FIRM with the lowest cost will score highest.

A. Evaluation Criteria: FIRMs will be evaluated on the following criteria:

1. Qualifications/Experience: FIRM qualifications and experience with similar projects. (30%)
2. Background/Key Personnel and Equipment: FIRM experience and qualifications of key personnel and references with similar projects. (20%)
3. Proposed Approach: FIRM's proposed approach to providing the SERVICES as described in Scope of Services noted on Attachment A. (25%)
4. Schedule/Timeline: FIRM's commitment to meeting the documented schedule in order to meet the goals of the LIBRARY. (5%)
5. Previous Work With The LIBRARY: FIRM's previous work history with the LIBRARY (5%).
6. Overall Cost: The overall total annual and initial five (5) year cost for SERVICES provided. (15%) (**Bid sheet submitted in sealed envelope and will only be considered after criteria 1 – 5 are evaluated**)

B. Ranking: FIRMs will be ranked in a three-part process:

Part 1. Responses received will be evaluated to ensure that FIRMs have met the submittal requirements stated in this RFP.

Part 2. Responses received that have met the submittal requirements will be evaluated and ranked in accordance with the RFP evaluation criteria one (1) thru five (5) listed above. Criteria six (6) Overall Cost will only be considered after the Proposals have been ranked in Parts one and two.

Part 3. Short-listed will have their Bid Sheets opened and the Overall Cost score will be added in to the scores received in Part 2. The final scores will in turn determine the final rankings.

If total costs exceeds the Chief Financial Officer's Signature Authority, the scores including proposed costs will be presented to the Library's Board of Trustees on November 12, 2026 for Final rankings.

The LIBRARY will initially attempt to enter into an agreement with the top ranked FIRM. If agreement is not reached with the top ranked FIRM, negotiations will be terminated with that particular FIRM and initiated with the next ranked FIRM, and so on, until an agreement is reached.

All responses accepted by the LIBRARY are governed by this RFP and any and all additional Terms and Conditions submitted by any FIRM are rejected and shall have no force and effect.

The LIBRARY reserves the right to reject any or all responses, for any reason, and will not be liable for any FIRM for cost incurred in connection with the preparation and submittal of a response or response to this RFP.