



## PURCHASING AND SUPPLY SERVICES

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Director of Purchasing and Supply Services

13300 Old Marlboro Pike | Upper Marlboro, MD 20772 | 301-952 6560

### ATTACHMENT C – TRANSITION PLAN

#### IFB DBS26-006

#### Chiller and Cooling Tower Maintenance and Repairs

##### 1. Project Overview

- a. **Objective:** Seamlessly transition HVAC maintenance and repair services from the incumbent vendor to the new vendor across all school district locations, maintaining service continuity and efficiency.
- b. **Scope:** The plan covers all district schools, administrative buildings, and other relevant properties.

##### 2. Transition Timeline

- a. Contractor must meet with HVAC Shop between Award and Contract start date.

##### 3. Roles and Responsibilities

###### a. School District Responsibilities

###### 1) Project Management & Oversight

- Building Services will designate a transition manager or team to oversee the transition process.
- Building Services will schedule regular meetings with both vendors to monitor progress.

###### 2) Documentation

- Building Services will provide the incumbent and new vendors with necessary access to district policies, site plans, and any other relevant documentation.
- Building Services will ensure all necessary approvals are obtained for the transition.

###### 3) Facilities Access

- Building Services will provide the new Contractor access to all locations for inspections, data collection, and equipment assessments.
- New Contractor will enter front door and sign in the main office.
- Building Services will ensure security protocols are followed during the transition period.
- New Contract will contact Security Services for Security Protocols. Security Service information will be provided by the Building Services.

###### 4) Issue Resolution

- Building Services will act as a mediator in case of disputes or issues between the incumbent and new contractor.
- Building Services will ensure prompt resolution of any service disruptions during the transition.

###### b. Incumbent Vendor Responsibilities

###### 1) Documentation Transfer

- Building Services will provide comprehensive documentation including:
  1. Maintenance logs



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2. Equipment inventories
  3. Service history
  4. Warranty information
- Building Services will prepare and hand over detailed site reports for each location to new Contractor upon request.

### **2) Service Continuity**

- Current Contractor will maintain regular services up to the transition date.
- Current Contractor will provide a final report on the status of all HVAC systems at the time of transition. \*\*\*An Amendment to the current contract(s) should be issued.

### **c. New Vendor Responsibilities**

#### **1) Planning and Coordination**

- New Contractor will develop a detailed plan for assuming responsibilities at the start of the contract.
- New Contractor will coordinate closely with the school district and incumbent vendor to understand the specifics of the contract.

#### **2) Site Inspections and Assessments**

- New Contractor will conduct site visits to all locations for initial assessments of HVAC systems.
- New Contractor will identify any immediate issues that require attention upon taking over.

#### **3) Training and Preparation**

- Building Services will train staff on district-specific requirements and equipment.
- New Contractor will ensure all necessary tools, parts, and personnel are ready for immediate deployment upon takeover.

#### **4) Communication**

- Building Services/New Contractor will maintain clear and consistent communication with the school district's transition team.
- New Contractor will provide Building Services regular updates on the progress of the transition.

#### **5) Service Implementation**

- New Contractor will ensure service continuity and address any immediate maintenance or repair needs.

#### **6) Reporting**

- New Contractor will submit an initial assessment report after taking over, outlining the condition of HVAC systems and any recommended actions.

### **4. Communication Plan**

- a. All communication must be conveyed with Facility Managers and/or HVAC Shop only.



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### **5. Risk Management**

- a. **Mitigation:** Joint inspections, contingency plans, emergency contact lists.

### **6. Final Handover and Post-Transition Support**

- a. **Final Review:** Joint review by school district, incumbent, and new vendor.
- b. This plan outlines a structured approach with clear roles and responsibilities for all parties involved, ensuring a smooth transition of HVAC services within the school district.