ONE OWNER BRIEF - COMPARABLE PROPOSALS - CLEARER DECISIONS

COMMERCIAL MAINTENANCE / OWNER WORKBOOK

Compare proposals *on the same facts.*

A print-ready toolkit for organizing property inputs, service-specific scope, pricing basis, assumptions, operating controls, qualifications, changes and closeout.

USE THE TOOLKIT IN FOUR MOVES

01 **State owner facts**

Property, zones, quantities and operating requirements.

02 **Issue one request**

Give each bidder the same worksheet and response format.

03 **Normalize differences**

Separate scope, alternates, assumptions and exclusions.

04 **Award deliberately**

Confirm fit, documents, changes and closeout.

PERSPECTIVE BEHIND THE QUESTIONS

12 years / 300+ buildings maintained

The figures describe team experience that predates The Maintain Company.

8 PAGES / MASTER COMPARISON / 5 SERVICE WORKSHEETS / DECISION CHECKLIST

OPEN THE ONLINE TOOLKIT

OWNER-SIDE PLANNING TOOL - BLANK WORKSHEETS - NOT A QUOTE OR WORK AUTHORIZATION

02 MASTER BID COMPARISON

Compare coverage before totals.

Record owner-controlled requirements in the first column. Use one sheet for two bidders and repeat it when more responses are involved.

PROPERTY / PORTFOLIO

RFP REFERENCE / REVISION

OWNER REQUIREMENT	PROVIDER A	PROVIDER B
Exact base scope		
Confirmed / estimated / unknown quantities		
Price and measurement basis		
Method and method dependencies		
Access, notices, staging and closures		
Property responsibilities		
Qualifications / vendor documents		
Exclusions and alternates		
Written change process		
Closeout deliverables		

COMPARISON GUARDRAIL

This sheet organizes bidder responses. It does not determine method suitability, legal or insurance requirements, contractor qualification, property approval or award.

OWNER-SIDE PLANNING TOOL - BLANK WORKSHEETS - NOT A QUOTE OR WORK AUTHORIZATION

03 EXTERIOR + AERIAL CLEANING

Scope the elevations before the equipment.

Record surfaces, zones, access, surrounding activity and water controls; then ask each bidder to explain the proposed method and alternative.

PROPERTY / BUILDING

ZONES / SYSTEMS / REVISION

OWNER-CONTROLLED FACTS / RECORD THE PROPERTY BEFORE THE METHOD

KNOWN CONDITION, OBJECTIVE, QUANTITIES AND OPERATING REQUIREMENTS

Use existing records and observable facts. Mark estimates and unknowns. Do not invent a diagnosis or approval.

SCOPE INPUTS / GIVE EVERY BIDDER THE SAME STARTING INFORMATION

- ☐ Elevations, surfaces and priority zones
- ☐ Confirmed, estimated and unknown area
- ☐ Prior coatings and sensitive transitions
- ☐ Test-area and stop criteria
- ☐ Entrances, vehicles and pedestrians
- ☐ Water, chemistry, drainage and washwater
- ☐ Access alternatives and ground controls
- ☐ Weather and operating window

PROVIDER RESPONSE / COMPARE THE SCOPE AND ITS BOUNDARIES

REQUIRED RESPONSE	PROVIDER A	PROVIDER B
Included zones and measurable basis		
Proposed method + access alternative		
Preparation / test area		
Protection + operating controls		

CLOSEOUT REQUEST / STATE THE HANDOFF BEFORE AWARD

- ☐ Completed-zone register
- ☐ Exceptions and inaccessible areas
- ☐ Authorized-change log
- ☐ Photographs or supporting records when included

BOUNDARY

Cleaning is not restoration, repair, hazardous-material work, engineering, facade certification or a guaranteed appearance result. Drone, lift and ground methods remain property-specific decisions.

OWNER-SIDE PLANNING TOOL - BLANK WORKSHEETS - NOT A QUOTE OR WORK AUTHORIZATION

04 AIR SYSTEMS

Map every included exhaust path.

Separate buildings, units, common laundry, individual and shared configurations, accessible components and access responsibilities before pricing.

PROPERTY / BUILDING

ZONES / SYSTEMS / REVISION

OWNER-CONTROLLED FACTS / RECORD THE PROPERTY BEFORE THE METHOD

KNOWN CONDITION, OBJECTIVE, QUANTITIES AND OPERATING REQUIREMENTS

Use existing records and observable facts. Mark estimates and unknowns. Do not invent a diagnosis or approval.

SCOPE INPUTS / GIVE EVERY BIDDER THE SAME STARTING INFORMATION

- ☐ Buildings, units and common laundry rooms
- ☐ Individual versus shared exhaust
- ☐ Appliance / fuel type when known
- ☐ Connections, cleanouts, fans and terminations
- ☐ Resident notice and entry process
- ☐ Keys, escorts and failed access
- ☐ Prior records and reported conditions
- ☐ Verification method and limits

PROVIDER RESPONSE / COMPARE THE SCOPE AND ITS BOUNDARIES

REQUIRED RESPONSE	PROVIDER A	PROVIDER B
Included systems / components		
Method + preparation		
Occupied-access assumptions		
Repairs / inaccessible-route treatment		

CLOSEOUT REQUEST / STATE THE HANDOFF BEFORE AWARD

- ☐ Location-level completion matrix
- ☐ Access exceptions and deferred areas
- ☐ Agreed observations or measurements
- ☐ Conditions referred to property team

BOUNDARY

Routine cleaning is not appliance or gas service, duct reconstruction, mechanical design, balancing, code or fire-safety inspection, HUD inspection, IAQ assessment or whole-system certification.

OWNER-SIDE PLANNING TOOL - BLANK WORKSHEETS - NOT A QUOTE OR WORK AUTHORIZATION

05 PARKING + LINE PAINTING

Start with the approved layout.

Give each bidder the same plan, marking inventory, surface information, traffic requirements and reopening expectations.

PROPERTY / BUILDING

ZONES / SYSTEMS / REVISION

OWNER-CONTROLLED FACTS / RECORD THE PROPERTY BEFORE THE METHOD

KNOWN CONDITION, OBJECTIVE, QUANTITIES AND OPERATING REQUIREMENTS

Use existing records and observable facts. Mark estimates and unknowns. Do not invent a diagnosis or approval.

SCOPE INPUTS / GIVE EVERY BIDDER THE SAME STARTING INFORMATION

- ☐ Owner-approved layout and revision
- ☐ Stalls, lines, arrows, symbols and curbs
- ☐ Dimensions, colors and coating requirements
- ☐ Existing, conflicting or obsolete markings
- ☐ Surface cleaning and preparation
- ☐ Repair or removal priced separately
- ☐ Traffic, pedestrians and phasing
- ☐ Cure and reopening criteria

PROVIDER RESPONSE / COMPARE THE SCOPE AND ITS BOUNDARIES

REQUIRED RESPONSE	PROVIDER A	PROVIDER B
Included markings + quantities		
Robotic / conventional application		
Preparation + material		
Closures, phasing + reopening		

CLOSEOUT REQUEST / STATE THE HANDOFF BEFORE AWARD

- ☐ As-applied register against plan
- ☐ Approved deviations
- ☐ Incomplete or deferred areas
- ☐ Product and closeout records when included

BOUNDARY

Application is not layout design, surveying, traffic engineering or accessibility and code certification. Robotic equipment applies suitable markings only from an approved plan.

OWNER-SIDE PLANNING TOOL - BLANK WORKSHEETS - NOT A QUOTE OR WORK AUTHORIZATION

06 BUILDING ENVELOPE

Name every joint, transition and boundary.

Record identified locations, substrates, prior conditions, material information, access and weather requirements before comparing scopes.

PROPERTY / BUILDING

ZONES / SYSTEMS / REVISION

OWNER-CONTROLLED FACTS / RECORD THE PROPERTY BEFORE THE METHOD

KNOWN CONDITION, OBJECTIVE, QUANTITIES AND OPERATING REQUIREMENTS

Use existing records and observable facts. Mark estimates and unknowns. Do not invent a diagnosis or approval.

SCOPE INPUTS / GIVE EVERY BIDDER THE SAME STARTING INFORMATION

- ☐ Joint / penetration / elevation schedule
- ☐ Substrates and existing materials
- ☐ Prior repair history and visible conditions
- ☐ Design / compatibility source
- ☐ Removal, backing, primer and preparation
- ☐ Mockup or adhesion decision point
- ☐ Access, weather and cure window
- ☐ Concealed or inaccessible exclusions

PROVIDER RESPONSE / COMPARE THE SCOPE AND ITS BOUNDARIES

REQUIRED RESPONSE	PROVIDER A	PROVIDER B
Included locations + quantity basis		
Material / submittal position		
Preparation + access		
Weather, cure + warranty records		

CLOSEOUT REQUEST / STATE THE HANDOFF BEFORE AWARD

- ☐ Installed-location register
- ☐ Material / lot records when agreed
- ☐ Exceptions and concealed conditions
- ☐ Authorized-change and open-item log

BOUNDARY

Maintenance does not establish the source of a leak, structural adequacy, flashing or drainage design, material compatibility, hazardous-material status or the condition of concealed areas unless separately reviewed and included.

OWNER-SIDE PLANNING TOOL - BLANK WORKSHEETS - NOT A QUOTE OR WORK AUTHORIZATION

07 SHARED SPACES + AIR QUALITY

Keep experience and evidence separate.

Use the top half for controlled scent-program decisions and the bottom half for a limited indoor-air question, method and information boundary.

PROPERTY / BUILDING

ZONES / SYSTEMS / REVISION

OWNER-CONTROLLED FACTS / RECORD THE PROPERTY BEFORE THE METHOD

KNOWN CONDITION, OBJECTIVE, QUANTITIES AND OPERATING REQUIREMENTS

Use existing records and observable facts. Mark estimates and unknowns. Do not invent a diagnosis or approval.

SCOPE INPUTS / GIVE EVERY BIDDER THE SAME STARTING INFORMATION

- ☐ Intended property-experience objective
- ☐ Approved and scent-free zones
- ☐ Product, device, intensity and schedule
- ☐ Feedback owner and pause authority
- ☐ Persistent or unusual odor gate
- ☐ Exact IAQ question and affected spaces
- ☐ Device / sampling method and limits
- ☐ Qualified interpretation or referral need

PROVIDER RESPONSE / COMPARE THE SCOPE AND ITS BOUNDARIES

REQUIRED RESPONSE	PROVIDER A	PROVIDER B
Scent setup + recurring service		
Policy, trial + pause controls		
IAQ method + reporting format		
Information limits + referrals		

CLOSEOUT REQUEST / STATE THE HANDOFF BEFORE AWARD

- ☐ Approved device / zone record
- ☐ Feedback, adjustments and pauses
- ☐ Question, method and relevant context
- ☐ Open decisions and specialist referrals

BOUNDARY

Scenting is not odor remediation, health treatment or an air-quality claim. Limited IAQ information is not medical diagnosis, hazard clearance, code determination or an automatic whole-building conclusion.

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08 DECISION + CLOSEOUT

Choose the proposal you can actually manage.

The lowest number is not the complete decision. Reconcile scope, assumptions, operating fit, qualifications, changes and handoff before award.

FINAL REVIEW

Confirm the response is complete and comparable.

- ☐ Base scope matches the owner brief
- ☐ Quantities and unknowns are identified
- ☐ Pricing basis and alternates are visible
- ☐ Method dependencies are stated
- ☐ Assumptions and exclusions are acceptable
- ☐ Property responsibilities are assigned
- ☐ Operating plan fits the property
- ☐ Requested documents are reviewable
- ☐ Written change process is clear
- ☐ Closeout deliverables are included

MATERIAL DIFFERENCES

Record what remains unresolved.

OPEN QUESTIONS, NORMALIZED COST DIFFERENCES AND REQUIRED CLARIFICATIONS

Do not erase a material variance just to make the proposals look equivalent.

DECISION RECORD

Name the owner and next action.

SELECTED PROVIDER / STATUS

DECISION OWNER / DATE

REQUIRED CLARIFICATION OR CONDITION BEFORE AUTHORIZATION

AUTHORIZATION BOUNDARY

Completing this toolkit does not award work, accept a proposal or authorize a method, price, schedule or site activity. Authorization occurs only through the applicable written property-specific agreement.

BUILD A SCOPE BRIEF

REQUEST PROPOSAL REVIEW

Next document: The Maintain Proposal Standard - maintaincompany.com/maintain-proposal-standard