RFP NO. 20260397
CITYWIDE ELEVATOR ASSESSMENT

Proposal For:

Prepared by:
Jay Sitzmann & Amy Gill
ATIS Elevator Inspections, LLC
10220 US Highway 19 North, Suite 400
Port Richey, FL 34668

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May 19, 2026

Charlotte County
Attn: Ms. Kim Chamberlain
18500 Murdock Circle, Suite 344
Port Charlotte, Florida 33948

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Dear Ms. Chamberlain,

ATIS Elevator Inspections LLC (ATIS) propose to provide Charlotte County with Citywide Elevator Assessment services as presented in RFP NO. 20260397.

ATIS was established to better serve the elevator needs of facility owners, property managers, and authorities having jurisdictions across the country. ATIS's vision is "People moving in a world with no conveyance related accidents," and we have a simple mission to "elevate conveyance safety, compliance and performance." ATIS strives to provide a great work environment and unparalleled customer service. Our company values promote personal responsibility, integrity, honesty, along with a collaborative mindset and customer centric disposition. We encourage constructive feedback as we continuously strive to improve the customer experience.

In this proposal, we express our firm commitment to delivering outstanding performance on behalf of Charlotte County, delivering all the services defined in the solicitation. Our past performance providing consulting, test witnessing and inspections, and certificate management services for states, cities, and municipalities, and private entities across the country is strong evidence that our management and key personnel have the experience, capabilities, and qualifications necessary to meet all the requirements of this contract. ATIS brings a culture of excellence, dedication, and integrity unique to this industry.

On behalf of the ATIS team, I am pleased to submit the offer enclosed. We are prepared to provide an oral presentation, and any additional information required in support of this effort.

Sincerely,

Jay Sitzmann
Sales Executive (Authorized to Sign Agreement)
ATIS Elevator Inspections, LLC
Corporate HQ Office
600 Emerson Road, Suite 225
St. Louis, MO 63141
P: (314) 743-7685
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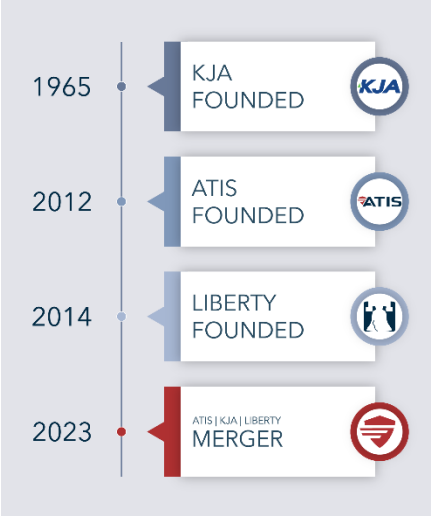
jsitzmann@atis.com

EXECUTIVE SUMMARY

Company Statement

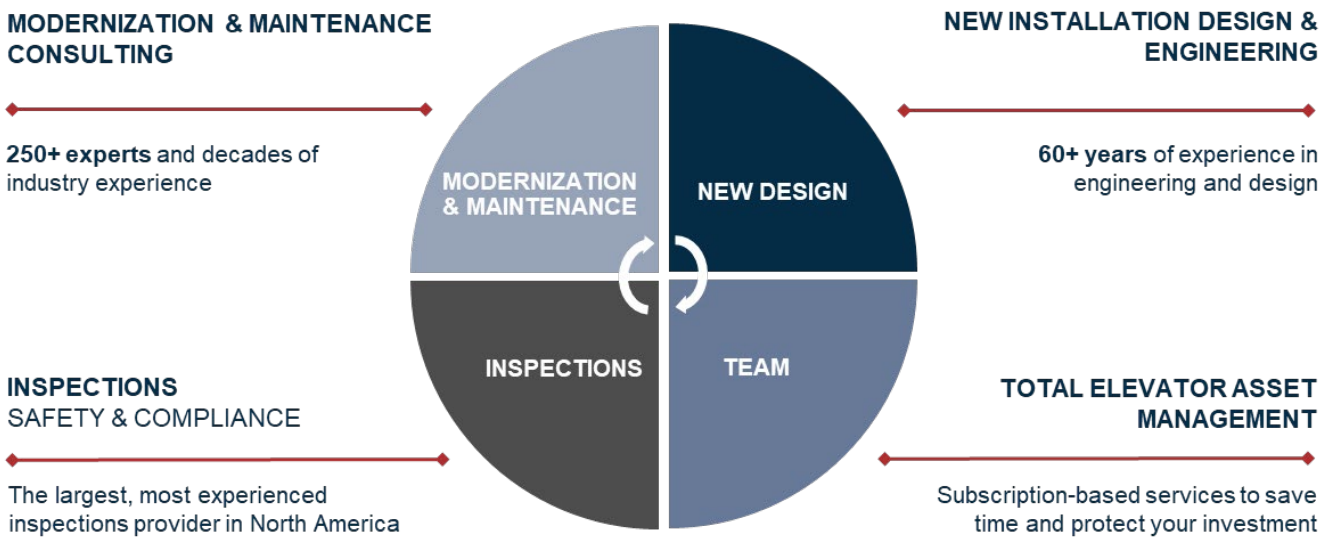
ATIS is the largest full service vertical transportation management company in North America. Our history begins in 1965 with the founding of KJA consulting in Canada. KJA steadily grew until it became the largest elevator consulting firm in Canada, performing over 60% of all elevator consulting work in the country. ATIS was founded in 2012 and quickly grew to become the largest elevator inspection company in North America. Our national clients began asking for help outside of just the standard AHJ inspections, which quickly created an additional service that ATIS began to offer and has excelled ever since. In 2023, ATIS and KJA merged with Liberty Elevator Experts, which further increased our service offerings, capabilities, customer base and overall market share.



Consulting

ATIS has 85 consultants spread across the US and Canada so that we can respond quickly across North America regardless of your location. ATIS consultants have decades of experience and come from a variety of unique and diverse elevator specialties. Because of this varied background, ATIS can cover consulting on the full life cycle of your equipment. Elevator condition/maintenance and due diligence assessments are our most requested service, but our experience ranges from creating design and engineering specifications for the tallest skyscrapers, to creating maintenance programs for large hospital and university campuses with varied equipment, to performing elevator assessments for two stop hydraulic elevators in rural areas. Our clients are important, and we take pride in no job being too big or small for our team.

Overview of Services ATIS offers



Modernization and Maintenance

We provide impartial assessment services to evaluate your equipment and determine which upgrades are essential to protect your investment.

We start with a detailed survey and analysis to determine what should be retained, restored, or replaced. We provide technical specifications detailing all requirements. A Request for Proposal is created along with a comprehensive review of all bids.

Throughout the project we assist with technical enquiries and uphold the timeline and budgetary commitments. A final acceptance inspection is performed to confirm conformance with the specification, with follow-up as needed.
Modernization services include:

- Extensive site survey and equipment inspection
- Client meetings to determine needs and budget
- Creation of detailed specifications of replacement parts
- RFP Management
- Bid leveling analysis and vendor selection assistance
- Management of project and vendor performance
- Final walkthrough and punch list

Regarding Maintenance, our experts will conduct an in-depth, onsite inspection to evaluate the operation, quality of maintenance, and expected lifespan of your equipment. This analysis will help guide future decisions regarding your maintenance provider and service level, help start your capital planning process and could eliminate unnecessary shutdowns. Many clients find that the assessment helps them to avoid unnecessary work proposed by their elevator contractor.

A Condition and Maintenance Assessment includes:

- 2–4-hour survey of equipment (dependent on units/stops)
- All travel to and from job
- Written assessment of condition
- Analysis of past maintenance, inspection records, and contract
- Written evaluation of maintenance program
- Estimated lifetime of equipment
- Basic Capital Planner

New Installation and Engineering

During the design development phase, our team provides extensive research, studies, recommendations, and documentation. We're brought in early in the process to ensure success, and we work with your team to develop specification details that the contractor will need for construction.

Throughout the project, we provide construction administration services to ensure following of the specifications and adhering to ASME standards.

We use a proprietary simulator to determine the real-world performance of elevators and escalators.

Our team has the capability to truly understand the performance of buildings with dedicated freight cars, sky lobbies with high-speed shuttles, and destination-oriented systems.

Inspections

Our team of 140+ Qualified Elevator Inspectors can be deployed at a moment's notice, with an average of over 30 years of experience, all meeting ASME QE-1 standards. We handle local, city, and state regulations everywhere across the US, from violation tracking to compliance management. We offer around-the-clock remote monitoring and support for elevators and escalators and are 100% dedicated to completing your inspections on time.

Total Elevator Asset Management

We are the only company in North America that offers comprehensive management in predictable monthly subscriptions for your elevators and escalators. Your elevator portfolio is a critical asset that requires care, expertise, and investment to maintain optimal performance, safety, compliance, and longevity. Without expert involvement, it's not an easy task.

Compliance	Maintenance	TOTAL MANAGEMENT
Inspection Tracking	KPI Tracking	Inspection Tracking
Certificate Autopilot	Invoice Auditing	Certificate Autopilot
Violation Tracking	Contractor Meeting	Violation Tracking
AHJ Submissions	24x7 Dedicated Support	AHJ Submissions
ATIS Alert		KPI Tracking
24x7 Dedicated Support		Invoice Auditing
		Contractor Meeting
		Consulting Discounts
		ATIS Alert
		24x7 Dedicated Support

TEAM EXPERIENCE AND QUALIFICATIONS

Statement of Experience and Qualifications

ATIS's corporate HQ office is located at 600 Emerson Road, Suite 225, St. Louis, MO 63141. Toll Free: 855-755-2847, Fax: 314-942-7100, Email: rfp@atis.com. ATIS regional office is located at 10220 US Highway 19 North, Suite 400, Port Richey, FL 34668.

For contract management, your ATIS contact will be Jay Sitzmann, Sales Executive, Direct: 314-743-7685, Email: jsitzmann@atis.com.

The project manager for this project will be Amy Gill, Director of Consulting, Southeast, Direct: (239) 989-1834, Email: agill@atis.com

ATIS has the largest dedicated team of vertical transportation inspectors and consultants in the United States, which consists of 140 licensed Qualified Elevator Inspectors (QEIs), 85+ Consultants, 20 Professional Engineers, a proprietary inspection, and certificate management database, and over 50 back-office support personnel who work together to deliver timely and reliable consulting, inspection, test witnessing services with integrity and professionalism.

Additionally, Charlotte County will receive the benefit of ATIS's key core competencies, which include:

Unsurpassed Conveyance Expertise: ATIS brings a team of over 300 Elevator Experts who provide third-party inspections, test witnessing, consulting, and managed services to more than 30,000 customers throughout the United States and Canada. ATIS's field expertise and depth is unmatched in the industry.

Value-Added Services, ATIS Alert: Our proprietary technology, ATIS Alert, conveniently and automatically notifies customers when it is time for their building's elevators, escalators, and other conveyances to be inspected. ATIS is the only comprehensive conveyance management company in the U.S. that currently offers this monitoring and notification system that can be seen in real time and assures our clients and partners that all conveyances within a building remain compliant with jurisdictional laws.

Inc. Magazine's Fastest Growing Private Companies: Due to our unwavering commitment to safety and our people, we have accumulated one of the largest and most experienced elevator teams in the world, and we have been recognized as one of the fastest growing private companies in America. This further ensures that Charlotte County will receive superior service from a company with sound operational and financial strength.

ATIS consulting currently manages over 250 consulting engagements in the United States and Canada.

The breakout of project workload is as follows:

20% Design Development

25% Maintenance Contract Management

25% Maintenance Assessments and Other

30% Construction Management

APPROACH TO PROVIDING REQUIRED SERVICES

Understanding and Approach

Understanding of Scope

Charlotte County is seeking a qualified professional consultant to perform a comprehensive assessment of elevators and wheelchair lift systems located in County-owned buildings to determine continued operation needs, modernization requirements, or full replacement. The objective of this effort is to improve safety, reliability, regulatory compliance, energy efficiency, and overall lifecycle value of the County's vertical transportation assets. Services include equipment inventory and documentation, physical condition assessments, code and ADA compliance reviews, evaluation of existing maintenance practices, and development of prioritized recommendations supported by order-of-magnitude cost estimates and service life projections. All site access will be coordinated through the Facilities Management Department, and deliverables will consist of detailed written reports by building and device, an executive summary, cost and phasing options, photographic documentation as appropriate, and a risk-based ranking matrix to support informed capital planning.

Key Objectives

- Improve **safety and reliability** of County-owned elevators and wheelchair lifts
- Ensure **compliance with current state codes, ASME A17.1 standards, ADA, and fire/emergency requirements**
- Identify equipment suitable for **continued operation, modernization, or full replacement**
- Enhance **energy efficiency and sustainability** where feasible
- Support **long-term lifecycle planning and capital decision-making** through prioritized, cost-based recommendations

Requirements

A. Inventory and Documentation: Identify all elevators within the specified buildings. Record: Manufacturer
   - Model/type (hydraulic, traction, MRL)
   - Year installed and modernization history
   - Capacity, speed, number of stops
   - Control systems and drive equipment
   - Cross reference the above information with the Florida state records
   - Any other information the firm considers relevant

B. Physical Condition Assessment: Inspect major components including, but not limited to: Hoistway and pit
   - Machine room or control space
   - Cab, doors, and entrances
   - Controllers, drives, motors, pumps
   - Safety devices and emergency systems
   - Evaluate wear, obsolescence, and availability of replacement parts
   - Service records and breakdown history
   - Frequency of outages

- Ride quality and leveling accuracy
- Assess remaining useful life of major components
- Any other component the firm considers relevant

C. Code and compliance review: Assess compliance with: Current state elevator codes ASME A17.1 / CS 844 (or other applicable standards)
   - ADA accessibility requirements
   - Fire service and emergency operation requirements
   - Any other relevant requirement

D. Maintenance Evaluation: Review and evaluate: Existing maintenance contracts
   - Adequacy of preventive maintenance program
   - Risks related to deferred maintenance
   - Other aspects of maintenance deemed relevant by the firm

E. Recommendations and Cost Analysis: Include: A description of work required including physical building alterations if required
   - Estimate capital costs (order-of-magnitude)
   - Anticipated service life
   - Impact on operations and downtime
   - Energy efficiency and sustainability considerations
   - Any other projections based on the firm's experience

Approach

ATIS' approach to a complex engagement such as with Charlotte County will consist of four main pillars to the success of the project:

a) Defined Consulting team roles and responsibilities.
   - Onsite visits by one or more consultants as outlined in the "Experience and Qualifications" section.
   - Lead Consultant/Code expert direction by Amy Gill
   - Local Field Consulting by Amy Gill and Tom Chambers.
   - Local Field Support by Micheal Milley and Bill Moore.
   - Invoice reconciliation and billing support by Jacob Lownsdale.

b) Strong Project Management of all consulting activities
   - Overall Scheduling of routine meetings
   - Detailed review of all equipment
   - Formal meetings with Client and Contractors
   - Capital Plan support based on equipment survey
   - Detailed reports of the existing conditions of the elevator equipment outlining current condition, near term maintenance or repair requirements, and potential for reuse.
   - Follow up of all activities via meeting minutes and action item tasking

c) Tactical data collection
   - All onsite visits are documented via a mobile data collection system and reports are created for each unit for each visit. The report shall consist of deficiencies that need to be corrected and a follow-up plan. Reports will be tailored to meet the needs of each client.
   - During on-site visits, elevators are equipped with data collection devices to collect ride quality and door performance, uptime and run time. This data will be merged with other performance determinants to create a dashboard of equipment performance metrics.

d) Client Reporting
   - The data reports will outline the following:
     i. Performance Data
     ii. Repair and maintenance recommendations
     iii. Capital planning data

Following are responses to questions posed on the Evaluation Form

IV. PROJECT CONTROL

A. Schedule

1. What techniques are planned to assure that schedule will be met?

Our team will utilize a structured project management approach to ensure the assessment schedule is maintained. This includes early coordination with facility personnel, confirmation of site access requirements, advance scheduling of field surveys, and continuous communication throughout the project.

Assessment activities, report preparation, and deliverable milestones will be tracked to ensure timely completion. Any potential scheduling conflicts or access limitations will be identified early and addressed proactively with the client.

2. Who will be responsible to assure that schedule will be met?

The assigned Lead Consultant will be responsible for overseeing the project schedule, coordinating field activities, maintaining communication with facility representatives, and ensuring timely completion of all assessment deliverables.

B. Cost

1. What control techniques are planned?

Cost control will be maintained through clearly defined project scope, detailed planning of field activities, efficient scheduling of site visits, and continuous monitoring of project hours and deliverables against the agreed proposal.

Our assessment process is designed to minimize unnecessary site visits and maximize efficiency while still providing a thorough evaluation of the elevator systems.

2. Demonstrate ability to meet project cost control.

Our firm has extensive experience performing elevator condition assessments for healthcare, government, commercial, and institutional facilities while maintaining project budgets and schedules. Through detailed planning, experienced field consultants, and standardized assessment procedures, we consistently provide comprehensive evaluations without unnecessary project cost escalation.

3. Who will be responsible for cost control?

The assigned Lead Consultant will be responsible for monitoring project costs, staffing, scheduling, and deliverables to ensure the assessment remains within the approved budget.

C. Recent, Current and Projected Workload

Our firm currently manages multiple elevator consulting and assessment projects throughout the Southeast for healthcare, government, commercial, hospitality, and institutional clients.
Our current workload is appropriately staffed to ensure adequate resources are available for this project. Dedicated project management and consulting personnel will be assigned to maintain responsiveness and timely completion of the assessment and reporting process.

VI. PRESENT PROPOSED DESIGN APPROACH FOR THIS PROJECT

A. Describe proposed design philosophy.

Our assessment philosophy focuses on providing the client with a clear, objective, and comprehensive evaluation of the existing elevator systems. The assessment will prioritize:

- Safety and code compliance
- Equipment reliability and operational performance
- Maintainability and serviceability
- Remaining useful life of major components
- Identification of obsolete or high-risk equipment
- Long-term capital planning considerations

Our recommendations will remain manufacturer neutral and focused on the client's operational and financial, best interest.

B. What challenges do you anticipate and how do you propose to solve them?

Potential challenges may include limited equipment access, occupied facility operations, incomplete maintenance records, equipment obsolescence, and varying conditions among elevator systems.

These challenges will be addressed through proactive coordination with facility personnel, detailed field documentation, operational testing where permitted, review of available maintenance and inspection records, and utilization of experienced elevator consultants familiar with aging and mixed-equipment systems.

C. Describe innovative approaches to this project.

Our approach combines detailed field evaluations with lifecycle analysis to help the client prioritize future repairs, modernization planning, and capital budgeting needs.

Where appropriate, we provide phased recommendations and risk-based prioritization strategies that allow the client to address critical issues first while planning for long term system improvements. Our reports are designed to provide practical, actionable information that supports both operational decision-making and future budgeting efforts.

VII. PRESENT EXAMPLES OF RECENTLY ACCOMPLISHED SIMILAR PROJECTS

A. Describe the projects to demonstrate.

Our firm has recently completed numerous elevator condition assessments for healthcare facilities, government buildings, commercial properties, and institutional campuses involving hydraulic elevators, traction elevators, machine-room-less systems, escalators, and accessibility lifts.

1. Schedule Control

Recent assessment projects were completed through coordinated site scheduling, efficient field survey procedures, and timely reporting processes that allowed clients to meet internal planning and budgeting deadlines.

2. Cost Control

Cost control was maintained through efficient coordination of field activities, standardized assessment methodologies, and proper allocation of consulting resources, ensuring projects remained within approved budgets.

3. Successful Value Engineering Solutions

Our assessments have assisted clients in identifying phased repair and modernization strategies, extending equipment life where appropriate, and prioritizing capital expenditures based on system condition, operational risk, and long-term value.

VIII. EXPERIENCE AND CAPABILITIES

A. Multiple government facilities with elevator and lift systems.

Our firm has experience performing assessments and consulting services for multiple government and public-sector facilities containing elevators, escalators, wheelchair lifts, and other vertical transportation systems.

These projects have included coordination with occupied facilities, accessibility requirements, life safety considerations, and long-term capital planning initiatives.

B. Life cycle cost analysis including value engineering

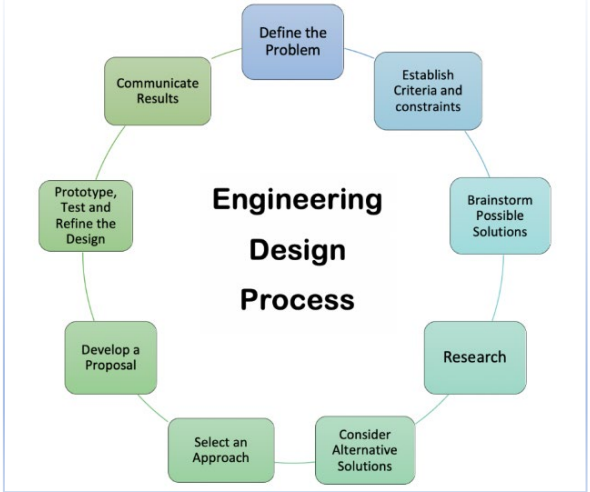
Our firm routinely performs lifecycle evaluations and value engineering analyses as part of elevator condition assessments. These evaluations consider equipment age, condition, reliability, maintainability, anticipated repair costs, remaining useful life, and modernization timing.

Our recommendations are designed to help clients make informed decisions regarding repair versus replacement strategies while balancing operational reliability, budget constraints, and long-term ownership costs.

PROJECT SCHEDULE / ABILITY TO PERFORM IN A TIMELY MANNER

Process and Procedures – Design Approach

ATIS takes a methodical and thoughtful approach to each project based in engineering design. Beginning with understanding our clients' and their stakeholders' needs, we use our technical experts and database of equipment information to clearly define the problem at hand and understand the engineering challenge presented. This is typically documented through a meeting or conversation bolstered by our statement of understanding. Through this discussion process, concepts and feasibility of the initial solutions are part of the brainstorm session where ideas are vetted. The primary consultant is tasked with narrowing down the concepts or developing the best solutions for the intended outcome. At this time, draft documentation is produced to assemble a clear and measurable scope of work based on the knowledge, assessment and experience which is correlated to the expected performance of the vertical transportation system, subsystem or modernization. At this point an understanding of how the build the solution as well as the contractor's role in the execution of their duties in the selected approach is detailed. At this point, documents are finalized and subjected to internal quality requirements.



Modernization presents a special challenge our experienced colleagues enjoy. Specialized knowledge of equipment, Codes, construction and installation practices helps inform intelligent options for interfacing the old with the new and identification where parts and subsystems are better refurbished, reused or replaced. Energy efficient designs are one such area of expertise. While the physics of elevator load and speed are consistent, solutions based in technological advances like gearless machine efficiency over geared machine friction loss, regenerative aspects of motors and even the most basic energy efficient lighting design helps inform every ATIS design solution. Energy efficient design practices also must be rooted in high technology guidelines like the Institute of Electrical and Electronics Engineers standard (IEEE). Bringing this depth of knowledge, experience and efforts to stay on the cutting edge of technology helps ATIS provide the most advanced problem solving.

Once a design has been vetted, developed and presented, an internal estimate is prepared to help our clients understand the value of the work to be performed. While budgeting has been rather challenging and unpredictable due to several factors including supply chain issues, raw material prices, labor availability, global demand and high profit expectations by contractors, we have found that our good working relationships with the elevator contractors has allowed us to keep pace with these changing targets. With this understanding, we have encouraged our front-line consultants to engage regularly with contractors in their region to understand these nuances and report them back to monitor regional and global trends. Understanding the budgeting pressures helps ATIS continually evolve our scope documents to provide limits to escalations, shipping charges and the ever-changing creative extra charges the contractors dream up. By documenting the expectations for allowable extra billing for scope changes, acceptable mark up and schedule expectations, ATIS provides detailed and measurable expectations for every project.

Coupling this information with the project schedule, milestone expectation and reporting requirements, the ATIS specifications help ensure on-time projects with few or no change orders. By a team approach, ATIS monitors the goals and objectives of each project. An in-house project plan is tracked

through our NetSuite software modules also used to define roles and responsibilities of each team member. As tasks are assigned for shop drawing review, review of payment applications, RFI's etc. the project manager coordinates and organizes the team's schedule and deliverables. Through regular check-up, internal as well as external meetings and clear communication, obstacles can be addressed, adjustments planned for, and the schedule maintained. When it comes to managing elevator contractors, in some cases the use of liquidated damages or bonus programs for on-time and early delivery has been used for contractor motivation.

The resulting 'feedback loop' helps ensure projects stay on schedule but also are delivered with the highest quality and lowest number of defects. Detailed construction administration through regular site visits and evaluation of work practices on-site help ensure that issues are addressed before becoming problems. Site review documentation is submitted in a timely manner with appropriate detail and photographic support to ensure that any issue is clearly presented with a solution for correction. This level of detail results in project delivery for the greatest potential life cycle.

Our feedback loop of project management results in high quality projects with minimal change orders and defects to be turned over for regular use. If chosen by our client, a detailed maintenance specification can be provided to maximize the life of the equipment after the warranty services. ATIS' knowledge of each manufacturer's inspection guidelines, maintenance control program (MCP) and the application of these documents ensures a maintenance program with measurable performance criteria and thorough coverage in favor of the equipment owner. We have tracked a trend in the industry toward elevator contractors reducing equipment coverage, blurring expectations and eliminating accountability. ATIS warranty, interim and post turnover maintenance specifications strive to have the contractors deliver a proactive and preventative maintenance approach versus the reactive type of maintenance the industry is embracing in their efforts to maximize profit for the maintenance providers.

Quality Assurance and Quality Control: Once draft documents are developed, ATIS undertakes a rigorous Quality Assurance and Quality Control (QAQC) process utilizing the knowledge and skills of our team. The process is a structured system to ensure accurate, complete documents which adhere to internal standards based on an extensive library of templates developed and refined over decades.

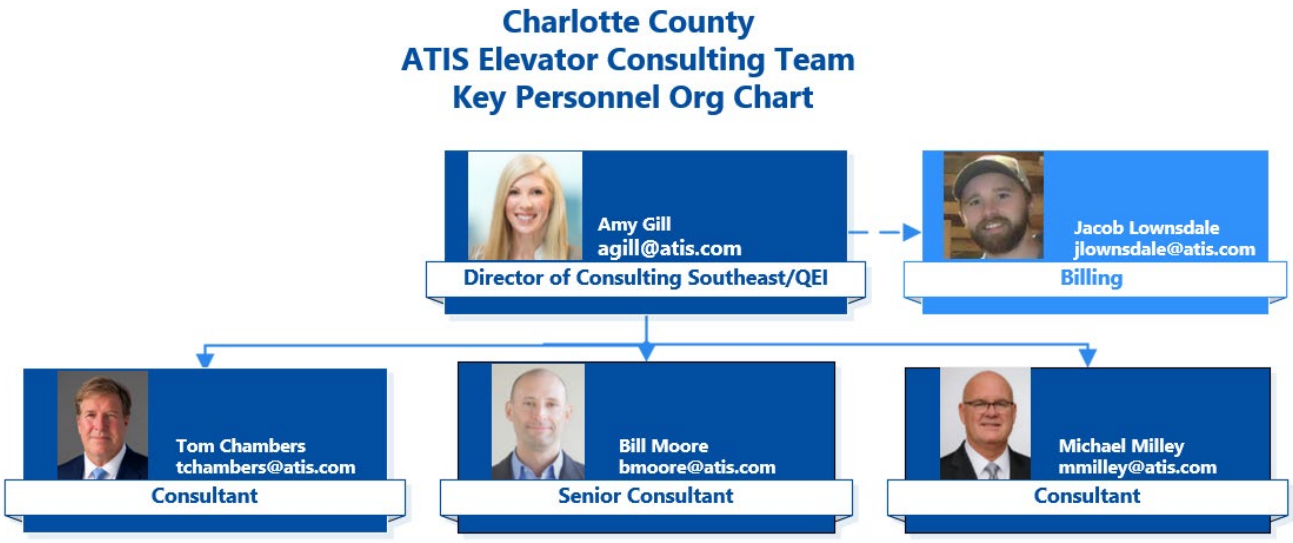
As vertical transportation experts, Code and product knowledge is critical to providing thoughtful performance-based solutions to elevator problems and design. ATIS provides innovative and intelligent approaches to the industry's most difficult problems. Our system of internal review helps ensure that the best approach is offered and clearly explained. Initial discussion of equipment, issues and approach to correct is a collaborative effort between regional team members. Once a draft is prepared, a peer-to-peer internal review is conducted for completeness, accuracy, buildability, and adherence to proper Codes and standards. Once finalized documents received a technical review including validation of facts, data and calculations to ensure project specific and regulatory requirements are met. At this point there is a final proofread by available back of house resources and finalization for entry into the ATIS archive database. This ensures documents are properly stored and traceable. There is a final step of post implementation review for identification of recurring issues or areas for continuous improvement. At this point, templates can be refined, checklists modified, or training guidelines developed based on 'lessons learned' to ensure reliability, consistency and compliance. ATIS has found that an effective QAQC process not only improves our deliverables but enhances efficiency and productivity with clear workflow. We have found that these investments enhance our intellectual property to be the best in class.

Service	Service Standard
Letters/ Requests (By Phone/Email)	Within 24 hours of receipt
Proposals	Within 48 hours of Request
Maintenance Audit/Assessment Reports	5 -10 Days After On-site Inspection
Specifications – Simple	10 -15 Days After Design Completion
Specifications – Complex	15 -20 Days After Design Completion

STAFFING AND QUALIFICATION / LIST OF KEY PERSONNEL

ORGANIZATION CHART

The project organizational chart below represents the primary team structure for the execution and delivery of consulting services to Charlotte County. Your ATIS Project Manager and Primary point of contact will be Amy Gill who will be the point person for all day-to-day interactions. ATIS will not substitute Amy's capacity or project consultants without prior expressed permission of the County.



Staffing Allocation

Project Team Member	Title	Responsibilities	Percentage Allocation	Tasks
Amy Gill	Director of Consulting	Project Lead	15%	Consulting Oversight
Bill Moore	Senior Consultant	Field Consultant	15%	Onsite Consulting
Michael Milley	Consultant	Field Consultant	10%	Onsite Consulting
Tom Chambers	Consultant	Field Consultant	10%	Onsite Consulting
Jacob Lownsdale	Project Support Associate	Project Support & Administration	5%	Account set up and invoicing

ATIS Formalized Response Process:

All requests will be responded to according to the severity of the request with a plan on how the task will get accomplished. The severity will be indicated in the request. The response will include a plan on how to accomplish the request and the next steps/

The table below indicates the number of days to respond to each type of request.

Nature of Request	Max Acknowledgment Time
Urgent	4 hours
Important	24 hours
Normal	48 hours

CONSULANT RESUMES
Lead Consultant/Designer – Amy Gill

AMY GILL

Director of Consulting, Southeast Region

Amy Gill brings 18+ years of experience in the elevator industry, with a diverse range of roles and expertise. She has been involved in various projects across multiple industries, including healthcare, transportation, aviation, hospitality, recreation, government, commercial buildings, condominiums, and both high-rise and low-rise applications. Her current role encompasses consulting, specifications, bid analysis, submittal review and approval, code compliance, project management, elevator assessments, and customer relations.

As a vertical transportation consultant, Amy conducts elevator site evaluations, reviews, and assessments. She is skilled in creating specifications for elevator maintenance and modernization, design development, submittal review and analysis, elevator construction analysis, and ensuring elevator contract compliance. Amy has also played a key role in the growth and development of inspection and consulting divisions within her organization. In her previous positions, she successfully managed sales territories, maintained strong relationships with clients, and delivered professional sales presentations.

Amy's experience as a project manager includes planning, directing, and coordinating activities for construction projects. Her attention to detail and focus on maintaining project budgets have ensured successful project fulfillment. Notably, she managed the installation of over 100 elevator equipment units at the Miami International Airport.

EDUCATION
- BS, Oakland University

AFFILIATIONS/CERTIFICATIONS
- Qualified Elevator Inspector (QEI)
- National Association of Elevator Safety Authorities (NAESA)
- Elevator Association of Florida

Responsible for Vertical Transportation Services:

- Maintenance Specifications
- Bid Analysis
- Submittal and Review
- Code Compliance
- Project Management
- Elevator Assessments
- Customer Relations

DIRECT: 239-989-1834
EMAIL: agill@atis.com

ATIS

An ATIS Elevator Advisor on your side

CONTACT: +1 855 755 ATIS ATIS.com

Senior Consultant – Bill Moore

BILL MOORE

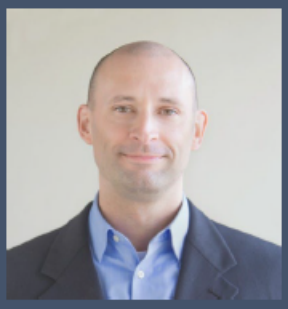
Senior Elevator Consultant – Southeast

Bill Moore is a senior elevator consultant with more than 15 years of experience advising building owners and facilities teams on the evaluation, planning, and modernization of vertical transportation systems. Based in Ohio, Bill supports ATIS clients with condition assessments, modernization strategies, managed services, and long-term capital planning across diverse portfolios.

Bill takes a practical, owner-focused approach to consulting, helping clients clearly understand system condition, performance risks, and lifecycle needs so they can make informed, defensible decisions. His experience spans a wide range of property types, including commercial offices, healthcare facilities, public venues, government portfolios, and large mixed-use environments.

Throughout his career, Bill has worked closely with owners, property managers, and service providers to assess existing equipment, develop modernization roadmaps, and support ongoing service and compliance efforts. His background includes consulting, management, and technical roles within the elevator industry, giving him a well-rounded perspective on contractor operations and real-world field conditions.

Known for clear communication and thorough analysis, Bill provides steady guidance throughout the full lifecycle of vertical transportation assets, helping ATIS clients reduce risk, plan effectively, and extend the performance and reliability of their elevator and escalator systems.



Responsible for Vertical Transportation Services:

- Modernization
- Due Diligence
- Architectural Design
- Maintenance Evaluations
- Elevator Traffic Analysis
- Capital Planning

DIRECT: 614-869-9592
EMAIL: bmoore@atis.com

ATIS

An ATIS Elevator Advisor on your side

CONTACT: +1 855 755 ATIS ATIS.com

Consultant – Michael Milley

Michael Milley
Elevator Consultant

Michael brings over 40 years of experience in the vertical transportation industry, with a comprehensive background spanning field execution, new installation and modernization operations, and operational leadership. His career includes extensive work across complex commercial environments, where he has supported both project delivery and long-term operational performance.

Michael has held leadership roles overseeing new installation and modernization operations, managing safety, performance, and project execution across large territories. His ability to bridge hands-on field expertise with operational strategy allows him to provide practical, experience-driven guidance to clients.

He began his career in the field as a construction helper and advanced through roles including installer, adjuster, superintendent, and operations manager. This progression provides him with a well-rounded perspective on system performance, troubleshooting, and lifecycle management. In his current role with ATIS, Michael provides technical advisory support, assisting with complex system troubleshooting, field assessments, and strengthening project delivery outcomes.

AFFILIATIONS/CERTIFICATIONS

- 40+ years in the vertical transportation industry
- NEIEP/IUEC Certified Elevator Mechanic

Responsible for Vertical Transportation Services:

- Equipment Evaluations
- Maintenance Management
- Modernization Consulting
- Technical Troubleshooting
- Project Execution Support
- Field Assessments
- System Assessments

DIRECT: 803-653-5717
EMAIL: mmilley@atis.com

ATIS

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CONTACT: +1 855 755 ATIS ATIS.com

Consultant – Tom Chambers

THOMAS CHAMBERS
Elevator Consultant

Thomas brings nearly 30 years of experience in the vertical transportation industry, with extensive expertise in regulatory compliance, inspections, maintenance oversight, and bureau operations. His background includes leadership roles within the North Carolina Department of Labor, where he directed statewide elevator and amusement device programs while overseeing compliance with state and national safety codes.

Throughout his career, Thomas has managed inspection operations, staff development, code enforcement, and strategic planning initiatives supporting safe and reliable vertical transportation systems. He has extensive experience collaborating with regulatory agencies, inspectors, contractors, and building owners to support operational performance and compliance objectives.

Thomas began his career in the field as an elevator mechanic, performing maintenance, repair, and troubleshooting work on elevator systems before advancing into inspection and leadership positions. His combination of field experience and regulatory oversight provides clients with practical insight into system safety, modernization planning, maintenance practices, and compliance management.

In addition to his consulting and inspection background, Thomas served as Bureau Chief for the North Carolina Department of Labor Elevator and Amusement Device Bureau, overseeing bureau operations, staff training, budgeting, and statewide enforcement programs.

AFFILIATIONS/CERTIFICATIONS

- Qualified Elevator Inspector (QEI-1), Class 4
- Certified Elevator Inspector – Florida
- Certified Public Manager
- American National Standards Institute (ANSI), Class I & II

Responsible for Vertical Transportation Services:

- Equipment Evaluations
- Regulatory Compliance
- Maintenance Management
- Modernization Consulting
- Inspection Services
- Code Compliance
- Safety Program Development
- System Assessments

DIRECT: 919-417-1196
EMAIL: tchambers@atis.com

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RELEVANT AND PAST EXPERIENCE

CUSTOMER REFERENCES

Customer Name: University of Florida

Contact Name: Joceyln Hickey, Operations Specialist

Contact Phone: 352-294-0648

Contact Email: j.hickey@ufl.edu

Project Description: Assessments, Modernization, Capital Planning, AHJ Inspections

ATIS Lead Consultants Name: Amy Gill

Customer Name: Pinellas County, FL

Contact Name: Michael Presti, Project Manager, Construction Services

Contact Phone: (727) 464-4074

Contact Email: mpresti@pinellas.gov

Project Description: Assessments, Modernization, Capital Planning

ATIS Lead Consultants Name: Amy Gill and Tom Chambers

Customer Name: Florida Fish and Wildlife (sub to: Long & Associates Architecture | Engineering)

Contact Name: Travis Steed, VP of Architecture, Long & Associates

Contact Phone: 813-839-0506 x233

Project Description: Assessments, Modernization, Capital Planning

ATIS Lead Consultants Name: Amy Gill and Tom Chambers

Project Consulting

- ATIS Elevator Consulting can provide consulting services for both new elevator installations, as well as elevator renovations. These services will typically include some level of pre-design (conceptual design, schematic design, design development, etc.), construction document (specification) preparation, bidding and negotiation services, and construction administration services (shop drawing review, responding to RFI, site visits, conformance inspections, commissioning inspections, punch list review). ATIS can work either directly for their Owner-Client, or with a chosen Architectural-Engineering firm.

- ATIS Elevator Consulting has “In House” capabilities for providing design of the elevator system for a newly proposed building or existing buildings by reviewing type of building, tenant distribution, population densities, special service requirements and other building characteristics. The Consultant can provide a traffic study to analyze the number of elevators required for the application, location, speeds, and capacities to deliver the most efficient elevator system designed specifically for the proposed or existing building.

- ATIS Elevator Consulting can provide division 14 specifications for vertical transportation design. Our firm can review and advise on associated building work for which the elevator contractor would not be responsible and provide a list of these items to the architect to be implemented in other areas of the construction documents. These items include structural loads of equipment, hoistway envelopes, heat output of equipment in machine room for air conditioning design, smoke sensor systems, smoke control of hoistways, pit reactions, interface of hoistway entrances, etc.

- ATIS Elevator Consulting is up to date on all vertical transportation equipment currently being furnished by Elevator & Escalator Suppliers and is familiar with all major elevator suppliers' stance on proprietary equipment and diagnostic tools for ongoing maintenance after the installation is complete.

- ATIS Elevator Consulting is knowledgeable on all present-day code requirements including ASME A17.1 Safety Code for Elevators & Escalators, IBC Code, NEC Code, A117.1 Accessibility Standards, and the recent Americans with Disabilities Act (ADA) requirements as they relate to elevators and escalators. ATIS Elevator Consulting has provided elevator consulting services for several elevators concerning Americans with Disability Act (ADA) for compliance.

- ATIS Elevator Consulting has provided elevator consulting service on several courthouse buildings, jails, and the Federal Reserve Bank, thereby having experience in security, such as card readers & cameras, and their relation to the elevator equipment.

- ATIS Elevator Consulting has vast experience with hospital and medical facility type buildings in the St. Louis, MO Region and has provided both elevator design analysis and specifications for elevators in new hospital and medical facilities in addition to performing several renovations and replacements in existing hospital and medical facilities. Clients include Sisters of St. Mary's, Mercy, BJC Hospitals (Barnes-Jewish Hospital, Christian Hospital, Alton Memorial), Washington University School of Medicine, all in the St. Louis metropolitan area. Also, Cox Hospital and Mercy Hospital in Springfield, Missouri, Boone Hospital in Columbia, Missouri, and Blessing Hospital in Quincy, Illinois, just to name a few.

- ATIS Elevator Consulting has vast experience with educational facilities and are currently the Elevator Consultant for the University of Missouri at Columbia and the other three (3) main U of M campuses. ATIS is also the Elevator Consultant for Missouri State University in Springfield (and satellite campuses), as well as Southeast Missouri State in Cape Girardeau. ATIS has performed (and continues to perform) multiple projects for the University of Illinois Urbana-Champaign, Southern Illinois University at Carbondale and Edwardsville and various other campuses including Washington University Danforth (Main) Campus and School of Medicine. Renovations and replacements of existing elevators in these educational facilities are challenging, as it is essential to assure a quality product that can withstand the abuse of the environment while assuring a safe, quality, and reliable elevator installation that can provide proper vertical transportation for personnel and equipment in the respective building. Additionally, ATIS has supported the Michigan Technological University by performing yearly maintenance assessments, RFP creation, and bid support.

- ATIS Elevator Consulting has provided elevator consulting services to several Housing and Urban Development (HUD) Buildings and college campuses resulting in a wide range of experience vandal resistant elevator design, to minimize future maintenance cost for service areas or high vandal areas.

- ATIS Elevator Consulting has assisted in elevator renovations and plans for historical buildings in the past including the Federal Reserve Bank of St. Louis, AT&T / Southwestern Bell Telephone, 1010 Pine, St. Louis, Missouri, the Missouri State Capitol Building & Supreme Court Building, Jefferson City, Missouri, the Illinois State Capitol, Springfield, Illinois, the U.S. Courthouse, Wichita, Kansas and various commercial buildings in St. Louis, Missouri.

SUBMITTAL FORMS

PROPOSAL SUBMITTAL SIGNATURE FORM

PART IV - SUBMITTAL FORMS
PROPOSAL SUBMITTAL SIGNATURE FORM

1.	Project Team Name and Title	Years experience	City of office individual will work out of for this project	City individual's office is normally located	City of individual's residence
	Amy Gill	18	Tampa	Tampa	Fort Myers, FL
	Bill Moore	15	Tampa	Tampa	Lewis Centre, OH
	Michael Milley	40	Tampa	Tampa	Charlotte, NC
	Thomas Chamber	30	Tampa	Tampa	New Port Richey, FL

2.	Magnitude of Company Operations	
	A) Total professional services fees received within last 24 months:	$ 60m
	B) Number of similar projects started within last 24 months:	500
	C) Largest single project to date:	$ 2.5m

3.	Magnitude of Charlotte County Projects	
	A) Number of current or scheduled County Projects	1
	B) Payments received from the County over the past 24 months (based upon executed contracts with the County).	$7,100

4.	Sub-Consultant(s) (if applicable)	Location	% of Work to be Provided	Services to be Provided
	NA			

5. Disclosure of interest or involvement: List below all private sector clients with whom you have an active pending contract and who have an interest within the areas affected by this project. Also, include any properties or interests held by your firm, or officers of your firm, within the areas affected by this project.

	Firm NA	Address
	Phone #	Contact Name
	Start Date	Ending Date
	Project Name/Description	

NAME OF FIRM ATIS Elevator Inspections, LLC

(This form must be completed and returned)

6. Minority Business:	Yes _____ No X
The County will consider the firm's status as an MBE or a certified MBE, and also the status of any sub-contractors or sub-consultants proposed to be utilized by the firm, within the evaluation process.	
Comments or Additional Information:	

The undersigned attests to his/her authority to submit this proposal and to bind the firm herein named to perform as per contract, if the firm is awarded the Contract by the County. The undersigned further certifies that he/she has read the Request for Proposal, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this proposal is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

By signing this form, the proposer hereby declares that this proposal is made without collusion with any other person or entity submitting a proposal pursuant to this RFP.

In accordance with section 287.135, Florida Statutes, the undersigned certifies that the company is not on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and does not have business operations in Cuba or Syria (if applicable) or the Scrutinized Companies that Boycott Israel List, or is not participating in a boycott of Israel.

As Addenda are considered binding as if contained in the original specifications, it is critical that the Consultant acknowledge receipt of same. The submittal may be considered void if receipt of an addendum is not acknowledged.

Addendum No. 1 Dated 5/15 Addendum No._____ Dated____ Addendum No._____ Dated_____

Addendum No._____ Dated_____ Addendum No._____ Dated____ Addendum No._____ Dated_____

Type of Organization (please check one): INDIVIDUAL (_) PARTNERSHIP (_) LLC X
CORPORATION (_) JOINT VENTURE (_)

ATIS Elevator Inspections, LLC — Firm Name
314-396-7894 — Telephone

ATIS Consulting Services — Fictitious or d/b/a Name
46-1471888 — Federal Employer Identification Number (FEIN)

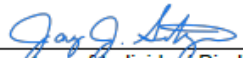
600 Emerson Road, Suite 225 — Home Office Address

St. Louis, MO 63141 — City, State, Zip
60 — Number of Years in Business

10220 US Highway 19 North, Suite 400, Port Richey, FL 34668 — Address: Office Servicing Charlotte County, other than above

Amy Gill — Name/Title of your Charlotte County Rep.
(239) 989-1834 — Telephone

Jay Sitzmann, Sales Executive — Name/Title of Individual Binding Firm (Please Print)

 — Signature of Individual Binding Firm
5/19/2026 — Date

jsitzmann@atis.com — Email Address

(This form must be completed & returned)

DRUG FREE WORKPLACE FORM

DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that ATIS Elevator Inspections, LLC does:
(name of business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.

2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.

3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).

4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.

5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.

6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Proposer's Signature

5/19/2026
Date

NAME OF FIRM ATIS Elevator Inspections, LLC

(This form must be completed and returned)

HUMAN TRAFFICKING AFFIDAVIT

HUMAN TRAFFICKING AFFIDAVIT
for Nongovernmental Entities Pursuant To FS. §787.06

Charlotte County Contract #20260397

The undersigned on behalf of the entity listed below, (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

1. I am over the age of 18 and I have personal knowledge of the matters set forth except as otherwise set forth herein.

2. I am an officer or representative of the Nongovernmental Entity and authorized to provide this affidavit on the Company's behalf.

3. Nongovernmental Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.

4. This declaration is made pursuant to Section 92.525, Florida Statutes. I understand that making a false statement in this declaration may subject me to criminal penalties.

Under penalties of perjury, I declare that I have read the foregoing Human Trafficking Affidavit and that the facts stated in it are true.

Further Affiant sayeth naught.

Signature

Jay Sitzmann
Printed Name

Sales Executive
Title

ATIS Elevator Inspections, LLC
Nongovernmental Entity

5/19/2026
Date

END OF PART IV

NAME OF FIRM ATIS Elevator Inspections, LLC
(This form must be completed and returned)

SAMPLE REPORT

[redacted] Assessment Report

Vertical Transportation Assessment and Capital Plan for

[redacted]

[redacted]

Field Assessment by
Amy Gill
ATIS 260056

March 23, 2026

CONTENTS

[redacted]

EXECUTIVE SUMMARY

The [redacted] commissioned ATIS to provide a maintenance and capital planning assessment of the vertical transportation equipment at the [redacted] On February 24, 2026, Amy Gill of ATIS conducted onsite reviews of the elevators and evaluated compliance of the elevators to applicable safety and building codes. We then evaluated the equipment to determine:

- ✓ Operating Condition
- ✓ Deficiencies
- ✓ Remaining system service life expectancies
- ✓ Pricing estimates for system modernizations

In general, the net useful life of elevator systems varies by system type. Conventional geared traction elevators typically have an expected lifecycle of approximately 20–25 years. These estimates assume proper maintenance, standard environmental conditions, typical usage, and continued product support from the original equipment manufacturer (OEM). Variations in these factors, including heavy usage or limited parts availability, can significantly impact overall service life.

Originally installed in 1979 by Otis and modernized in 2011 by TKE, these two passenger elevators are equipped with TAC50-04 controllers, the original geared Otis machines, and have updated TKE motors. Here is a more fluid, professional narrative version with improved flow and no bullet points:

The TAC50-04 control system is now aging a with increasing difficulty anticipated in sourcing replacement components. The combination of legacy Otis machinery with newer TKE controls and motors introduces potential long term compatibility and support challenges. Additionally, there is observable wear in mechanical components consistent with the age and service history of the equipment. The door equipment and associated components also exhibit typical wear and are likely contributing to ongoing reliability issues and service calls. Overall, the system condition is considered fair, though reliability is expected to decline as components continue to age.

As a result of these conditions, there is an increased likelihood of unplanned outages and service disruptions, along with the potential for extended downtime due to limited parts availability. Maintenance and repair costs are expected to rise over time, and the ability to maintain consistent long-term system reliability and performance will be diminished.

While portions of the system were modernized in 2011, several critical components are now approaching or have exceeded their typical service life expectancy. Without meaningful reinvestment, the equipment will continue to experience declining performance and reliability.

To address these concerns, it is recommended that a [redacted] modernization of the control system, machinery and associated components be considered to improve reliability and long-term supportability. Upgrades to the door equipment should also be considered, as these components are a primary source of operational issues. Additionally, development of a capital improvement plan is recommended to address reliability concerns and long-term asset value.

End Executive Summary.

EQUIPMENT SUMMARY

EQUIPMENT SUMMARY

DESCRIPTION

Device ID	Type	Landings	Floors	Speed (fpm)	Capacity (lbs.)	Doors	Door Size	Control Manufacturer	Installation / Alteration
Elevator 1 SN#28933	Traction – Passenger	13	*L, 2-12, PH	200	2500	SSSO	42" x 84"	TKE	1979 / 2011
Elevator 2 SN#28934	Traction – Passenger	13	*L, 2-12, PH	200	2500	SSSO	42" x 84"	TKE	1979 / 2011

MAJOR COMPONENTS

Components	Manufacturer – Model	Descriptions
Controller	Thyssen Elevator	TAC 50-04
Machine	Otis	Geared
Governor	TKE	5501AF
Door Operator	TKE	HD Harmonic Operator
Door Edge	Tritronics	Detector Full Height
Door Equipment	Otis / TKE	Tracks, Hangers, Interlocks
Car Guides	TKE	Roller Guides
Counterweight Guides	TKE	Roller Guides
Fixtures	Innovation	Surface Mount #4 Stainless Steel

End Equipment Description.

ELEVATORS BY GROUP

METHODOLOGY SUMMARY

In preparing a prioritization of units, ATIS utilizes a detailed methodology and scoring rubric, located in the Supporting Documentation of this report. They objectively identify, formulate, and prioritize a resolution for equipment condition assessment and replacement. Using this scoring rubric, each elevator, or group of elevators, is evaluated according to the following criteria:

- Equipment age
- Equipment current condition and accumulated wear
- Original design and inherent quality of each system and system components
- Overall usage and facility operations factor
- Environmental conditions each elevator is subjected to
- Parts availability, repair support, or obsolescence
- Callbacks and reliability when provided

Together, these factors are employed to establish a basis of modernization priorities. Although these factors are important for determining capital planning overall, as well as individual building needs, our recommendations are also based on feedback from the facility, industry standards, and any applicable safety Code requirements. This report includes:

- Projected equipment upgrade recommendations for the elevators
- Dates for equipment upgrade recommendations
- Cost estimates for modernization/alteration

[redacted]

Traction Elevators with TAC50-04 Controllers

Elevators 1, 2 – Passenger Elevators

[redacted]

Passenger 1, 2 : TAC50 Controls Equipment Information

[redacted] Assessment Report

Device IDs	Device Information			
	Use	Type	Floors	Year of Install/Mod
	Passenger	Overhead Geared Traction	13	1979 / 2011
	Speed (fpm)	Capacity (lbs.)	Service Tickets in 12 Months	
	200	2500	Not Evaluated (NE)	
	Equipment Information			
	Original Manufacturer	Controller	Machine	Door Operator
	Otis	TAC 50/04	Otis	TKE HD
Passenger Elevators 1 (28933) 2 (28934)	**Scoring** **Rating Scale: 5: Like New, 4: Good with Wear, 3: Acceptable, 2: Marginal, 1: Poor** Detailed in Mehodology Section			
	1. Equipment Age	2. Equipment Condition / Wear	3. Design / Inherent Quality	4. Facility Impact Factor/Usage
	3	4	3	3
	5. Environmental Conditions	6. Parts Support & Availability / Obsolescence	7. Callbacks / Reliability	Total Score Out of a Top Score of 35
	3	5	3	24

ATIS

[redacted]

ELEVATOR PERFORMANCE SUMMARY

Variable	Units	Car 1	Pass (P) / Fail (F)	Car 2	Pass (P) / Fail (F)
High Speed - Up	200 ± 10% fpm	195.905	P	197.682	P
High Speed - Down	200 ± 10% fpm	202.051	P	201.677	P
High Time - Up	sec	30.48	P	30.20	P
High Time - Down	sec	30.48	P	30.22	P
Run Time - Up	sec	37.06	P	37.30	P
Run Time - Down	sec	37.06	P	37.24	P
Start - Up	milli-g	35	P	25	P
Start- Down	milli-g	49	P	31	P
Acceleration - Up	milli-g	62	P	61	P
Acceleration - Down	milli-g	63	P	63	P
Deceleration - Up	milli-g	62	P	62	P
Deceleration - Down	milli-g	63	P	63	P
Jerk - Up	ft/sec³	7.08	P	7.23	P
Jerk - Down	ft/sec³	8.04	P	8.03	P
X Axis Peak - Up	milli-g	9.76	P	26.85	P
X Axis Peak - Down	milli-g	14.34	P	20.59	P
Y Axis Peak - Up	milli-g	8.39	P	10.07	P
Y Axis Peak - Down	milli-g	11.29	P	16.17	P
Sound SPL - Up	dB	29.83	P	31.13	P
Sound SPL - Down	dB	31.36	P	30.10	P
Door Force	<30 lbs.	17	P	25	P
Door Kinetic Energy	<7 ft lb.	4.4	P	4.2	P

Passenger Elevators General Conditions

Elevators 1 and 2 are the main passenger elevators for the Condominium building. These elevators were originally installed in 1979 by Otis. Both units were modernized in 2011 by TKE..

Machine Room: The machine room houses the primary elevator operating equipment, including controllers, hoist machines, governors, and electrical disconnects.

The existing controllers were installed as part of the 2011 modernization and consist of ThyssenKrupp TAC 50-04 microprocessor-based systems with AC variable voltage variable frequency (VVVF) motor control. The TAC 50-04 controller is no longer in production and is not installed on new equipment. While no formal obsolescence notice has been issued, it is understood that factory support is nearing its end, with continued support expected to transition to local branch offices and third-party repair facilities.

Based on industry experience, this condition typically results in extended lead times for replacement control boards and components. It is recommended that spare critical components be procured and stored onsite, if available, to minimize potential downtime.

The passenger elevators currently have the original Otis geared machines and AC motors which were updated with modernization in 2011. These are overhead geared, duplex passenger elevators. The machines are approximately 47 years old and exhibited signs of oil leakage at the time of inspection. Consideration should be given to replacement of the machines as part of a future modernization program.

Outdated documentation was observed in the machine room. Maintenance logs and firefighter service logs were not current, which does not meet code requirements. These logs should be maintained and updated regularly by the elevator service provider, unless otherwise specified in the service agreement.

Fire service testing logs were also found to be outdated. Monthly testing and documentation are required. Responsibility for compliance ultimately rests with building ownership unless explicitly included in the maintenance contract.

Wiring diagrams were present in the machine room, in compliance with code requirements.

Hoistways: Guide rails were observed to be in acceptable condition for continued use, with no significant deficiencies noted in the visible sections.

Hoistway door tracks, hangers, and interlocks appear to be primarily original Otis equipment, with the exception of the ground floor, where components appear to have been replaced. Car-side door tracks and hangers are also in acceptable condition.

Both elevators are equipped with TKE HD door operators. These operators were manufactured between 1973 and 2019 and have been declared obsolete by the manufacturer. TKE no longer produces these units, and replacement parts are increasingly difficult to obtain. In the event of a major failure, full replacement of the door operator would likely be required, potentially resulting in extended downtime. TKE released a notice in October 2019 for “End-of-Product-Life” which included the HD door operators. *“Due to obsolescence of our supplier components, we can no longer manufacture the harmonic door operator.* I have included the TKE Product Availability Notice: HD Door Operator below for reference.

A limited number of door rollers were noted as requiring adjustment or replacement, which is typical as part of routine maintenance.

The elevator doors are single-speed, side-opening units measuring approximately 42 inches wide by 84 inches high. Door panels are currently in acceptable condition; however, they should be re-evaluated at the time of modernization for potential replacement. The ground floor hoistway doors appear to have been replaced with stainless steel finishes, while upper floors retain original enamel finishes.

Door hardware components including clutches, rollers, closers, and guides are in fair condition and will require ongoing maintenance or replacement.

Hoistway wiring, traveling cables, limit switches, and safety devices were observed to be in acceptable condition.

Pits are accessible through the bottom hoistway doors. Pit equipment was in acceptable condition for continued operation. Pits should be cleaned of dirt and debris.

Tops of cars have accessible emergency escape hatches and the electrical switches on the escape hatches appeared to be operational but were not tested as part of the survey. The tops of cars do require some housekeeping as there is dust and debris present.

Fixtures Both car and hall fixtures at all landings were in acceptable condition and appeared to be from the 2011 modernization. They are surface mount hall fixtures with OEM style buttons and proper signage. They meet the elevator Code at the time the elevators were installed. The ADA hands free phones were present and tested.

Cab interiors the interiors were in very good condition on the passenger elevators. Passenger elevators have custom interiors which appear to be standing up well to the traffic.

The existing door protection devices are full height door infrared detector edges which are suitable for continued use.

Elevator performance: There are no major concerns about these elevators' ride quality, operation and speed measurements were within anticipated tolerances. The doors on Car 1 are noisy and contact the hoistway equipment at certain floors. The door equipment requires adjustment to provide smooth and quiet operation.

TK Elevator Manufacturing
9280 Crestwyn Hills Dr
Memphis, TN 38125

August 24, 2023

Product Availability Notice: HD Door Operator

Dear Valued Customer,

This letter is an official notice regarding the product change for Dover/TK Elevator Harmonic Door Operators.

Effective Date: October 1, 2019
Components: HD-73, HD-85, HD-91, HD-98, HD-03, HD-LM, HD-04, HD-11, HD-12
Production Years: 1973 - 2019
Lifecycle Stage: Out of Production

What does "Out of Production" mean?

Our End-of-Product-Life process declares a component "Out of Production" when our factory and/or approved suppliers indicate they can no longer support replacement parts. Certain spare parts remain available through our TK Elevator's Spares Business Center, but supplies are limited.

Why is this happening?

As new technologies emerge, it becomes increasingly difficult to continue manufacturing certain parts and products. Due to obsolescence of our supplier components, we can no longer manufacture the harmonic door operator. The LD-16 linear door operator will simplify our product offering for our customers by providing one base solution for new installation, modernization, and service lines of business. The LD-16 is available for purchase and installation now, and it will improve service reliability in a cost-efficient manner.

What does this mean for your equipment today?

HD door operators are close to the End-of-Life product stage and the risk for obsolescence is high. Limited spare part production has been initiated. TK Elevator offers the Wittur LD-16 as a replacement solution for modernization and repair upgrades.

What action should I take?

If you haven't already, you should meet with your TK Elevator representative as soon as possible. They will provide you with the options available for your specific equipment.

Kind Regards,

Tiffany Judd
Head of Product Management – North America
TK Elevator

CAPITAL PLANNING BUDGETS

This section presents recommendations, anticipated timelines, and projected costs for modernization of the vertical transportation equipment. These recommendations are based on system condition, usage, and other factors evaluated through the scoring rubric provided in Appendix A. The tables below identify upgrades that should be considered for future capital expenditure planning.

Based on industry standards, the typical life expectancy of elevator systems is approximately 20 to 25 years. Given the current age of the equipment and considerations related to parts availability, it is advisable to begin planning for modernization in the near term.

The following pages outline potential project scopes and associated cost scenarios for elevator modernization and system upgrades, developed in accordance with current industry pricing trends. For projections extending into future years, a 7% annual escalation factor has been applied, reflecting the average cost increases observed across the industry in recent years.

The costs presented herein are specific to the elevator modernization scope. However, additional building-related work may be required to achieve full code compliance. Such work may include, but is not limited to, electrical system upgrades, machine room HVAC modifications, and fire alarm integration. These ancillary requirements may impact the overall project cost and should be evaluated as part of the broader modernization planning process.

Priority	Elevator/ Group	Units	Recommendation	1-5 Years Per Elevator	Capital Total Per Group (2 Elevators)
Medium	Elevators 1&2	2	Modernization	$350,000	$700,000.00
Medium	Elevators 1&2	2	Modernization Turnley Work: HVAC, Electrical, Fire Alarm, Generator	TBD	TBD
Low	Elevators 1&2	2	Cab Interior	$25,000	$50,000
				Grand Total	**$750,000.00**

MODERNIZATION PLANNING

All comprehensive modernizations recommended should be planned and executed to ensure 20 years of useful life and reliable service. Modernization plans should be developed, specifications created and competitively bid in a solicitation as soon as possible for the immediate and short-term 1–3-year upgrade recommendations.

A consultant specification should be developed to include all the equipment, system components and sundries to be replaced, details on refurbishment, and any alternates and related building work items for a turn-key project managed by the elevator contractor. Typically, elevator contractor proposals do not have measurable performance terms and are not comprehensive leaving opportunities for change orders and cost overruns.

The planning for complete and comprehensive elevator modernization projects includes furnished and installed elevator equipment, twelve months of warranty maintenance and all features and operations for the equipment to comply with the current national and local elevator Codes, ASME A17.1, local building Codes, and American Disability Act (ADA) codes.

Recommendations also include our opinion of the probable cost for building-related work items. Building-related work, or "work by others" must be completed in conjunction with the elevator modernization projects to pass the final inspection and may include hoistway or machine room upgrades, electrical, mechanical, or general construction work. Comprehensive modernization/alteration necessitates compliance with elevator and building Codes for compliance with the latest adopted versions.

A typical timeline for modernization is provided in the Modernization Planning table below.

Modernization Planning

Intrepid Condominium Association, Assessment Report

Item/Task – Timeline	Timeline
Prepare RFP Specifications	3 weeks
Contract/Bid Review and Award	4 Weeks
Shop Drawing Approval	3 Weeks
Equipment Fabrication	18-20 Weeks
Equipment Delivery	2 Weeks
Modernization	
• Typical Traction Elevator	14-16 Weeks
• Each Additional Elevator (weeks per elevator)	15 Weeks
Final Adjusting and Testing	2-4 Weeks
Total Elapsed Time for This Project: Includes one modernization crew starting in 2025	+/- 84 Weeks for both Traction* (Varies based on number of elevators in group and scope)

*Note: Number of elevators in each group will alter modernization schedules. Some efficiencies are gained in multiple car modernization projects.

Modernization Objectives

Comprehensive elevator modernization should consider the following objectives:

1. Improved safety system.
2. Improved system reliability.
3. Improved stopping accuracy and ride quality.
4. Improved door operation.
5. Compliance with current Firefighters' Operation and Recall Requirements.
6. Compliance with existing elevator and building Code requirements.
7. Improved equipment serviceability.
8. Improved aesthetics for building tenants.

Probable costs include contractor work for the fire alarm and electrical work. Costs provided are not fixed estimates, as applicable Codes change and are adopted by the State at various intervals. These are budget prices to meet the current code requirements as of the date of this report.

End Modernization Planning section.

REVIEW OF MAINTENANCE CONTRACT / ADDENDUM A

Item	Description
Supplier	Initial Contract by Elevator CSI / Addendum A by TKE
Term	**Initial Contract:** 5 year initial term year to year thereafter **Addendum A:** 5 Initial year to year thereafter
Effective Date	**Initial Contract:** 02/01/2013 / **Addendum A:** 10/1/2018
Next Expiration	**Initial Contract**: 02/01/2018 / **Addendum A:** 10/1/2026
Termination	Immediately upon written notice of approval of modernization by another vendor, non-performance 30 day
Pricing	**Initial Contact 2013:** $580.00 per month/ **Addendum A 2018:** $650 per month
Annual Escalation Cap	**Initial Contract:** 5% **Addendum A:** 3.5% per annum
Required Preventative Maintenance Visits	Yes: "Minimum Monthly" dedicated PM visits
Shutdown Cap Requirement	Yes: 6 per unit per annum
Performance Requirements	Yes: door force, acceleration, deceleration, leveling and ride quality
Nonperformance Clause	Yes: 30 days to cure
Coverage Inclusions	Full coverage parts repair and replacement
Highlighted Exclusions	Negligence by anyone other than elevator vendor or subcontractors, property items , disconnects, lamps for machine rooms, audio and visual devices not provide by elevator contractor.
Callback Coverage	Regular time callback services are included. Overtime premium portion only (overtime rate- regular rate). Overtime entrapment calls included
Required Response Times	Emergency calls immediately, Regular hours 120 minutes, After hours 180 minutes
Contract Biling Rates	Yes
Out of Service Deductions	Yes, elevators down for 72 continuous hours shall have billing suspended
Parts Pro-Ration	Not permitted
Obsolescence	No consideration given
Safety Tests	Category 1, Category 5 Full Load
Fire Service Testing and Logs	Yes: monthly tests requited to be performed by elevator maintenance contractor
Emergency Phone Communication	Monitoring of the elevator emergency phone will be provided by TKE. It is the responsibility of Owner to have a working phone line.
Parts inventory	Within 48 hour availability

Consideration should be given to developing a maintenance contract that provides for specific minimum hours to be provided for preventive maintenance, not to include callbacks and/or periodic testing as required by applicable codes. The current agreement does not have a stated number of hours per month. In addition, accountability to meeting these hours through enforcement of penalties.

A comprehensive coverage agreement with detailed inclusions and exclusions is advised. Supplemental Invoices should be required to have reasonable proof prior to payment approval.
Inclusion of the Firefighters' monthly operation checks to be completed by the elevator vendor is recommended.

It is very valuable to have the maintenance contract specifically detailed as a non-exclusive Agreement between the parties to protect the owner's ability to obtain competitive pricing for non-maintenance requirements and services.

It is recommended that the building owner initiate a monitoring program and be continued by an experienced third party to ensure that the quality of the maintenance program increases. This will push the maintenance contract provider to improve the preventative maintenance on these elevators due to the monitoring effort.

End Maintenance Contract Section.

MAINTENANCE EVALUATION

Planned, systematic maintenance helps prolong the life of elevator equipment, improves safety and reliability, saves repair and replacement costs, and keeps the equipment compliant with applicable codes. Additionally, it helps protect the capital investment made in the vertical transportation system. In this context, maintenance can be categorized into general areas, including adjustment, cleaning, lubrication, replacement of worn parts, and record keeping.

- Well-adjusted equipment operates smoothly and efficiently, helping to improve passenger flow, reduce passenger wait times, and improve rider comfort. Equipment should be maintained to original installation specifications.
- Clean equipment, free of accumulation of oil, grease, dirt, dust, and rubbish is less likely to require service calls and reduces risk to equipment. Additionally, clean pits, machine rooms, and hoistways have less fire risk than those with accumulation of oil and rubbish. Elevator spaces and equipment are expected to have a professional appearance.
- Lubrication reduces equipment wear and extends the useful life of mechanical components. Lubrication needs to be done per manufacturer specifications.
- Replacement: Early detection and replacement of worn parts helps prevent avoidable breakdowns, downtime, and service calls. Efforts should be made to regularly check all equipment and make proactive replacements where indicated.
- Complete and up to date records are required by elevator and escalator codes. Records include a maintenance control plan (MCP) developed by the service company that outlines the maintenance to be performed and the intervals at which this maintenance needs to be done. Records also include maintenance, repair, replacement, where the technician records their site visits and work done, firefighters' service testing logs, electrical prints, and any special procedures necessary for testing and maintenance.

Elevator preventative maintenance is labor intensive. Approximately 80% of the cost to maintain each device is associated with skilled labor costs. The labor costs include regular and systematic preventative maintenance, installation of replacement parts and components, adjusting, testing and callbacks. The remaining 20% of the preventative maintenance costs is for replacement parts, repair shop costs, and supplies.

These areas of maintenance are not mutually exclusive to each other. When a routine preventative maintenance visit is being conducted for a specific task, the technician may detect failure of other components or adjustments that are required in another areas.

TKE currently provides maintenance service on this property. The maintenance service levels provided by appear to be below average, which can be improved with short-term intensified levels of increased maintenance services. We have evaluated and rated the observed maintenance conditions which are illustrated in the table below.

Maintenance Area	Elevators
Adjustment	2.0
Cleaning	2.0
Lubrication	2.0
Replacement	2.0
Record Keeping	2.0
Overall Score	**2.0**

Ratings: 1 = Poor, 2 = Unsatisfactory, 3 = Satisfactory, 4 = Above Average, 5 = Excellent

Our evaluation of maintenance levels being provided is based on the following ratings:

Rating	Description
1.	A rating of "1" indicates unacceptable or poor levels of maintenance service provided by the Contractor. This level of maintenance requires a significant increased effort by the maintenance Contractor in several areas in order to justify payment of the monthly contract. Approximately 15% of equipment reviews approach this level.
2.	A rating of "2" indicates Unsatisfactory levels of maintenance in most areas. Typically, some short-term, increased intensified effort is required by your maintenance contractor to improve to the acceptable rating of 3. Approximately 30% of our equipment reviews result in this rating.
3.	A rating of "3" indicates satisfactory levels of maintenance services being provided by your maintenance contractor. Improvements may be required in specific areas as noted. Approximately 40% of our equipment reviews result in this rating.
4.	A rating of "4" indicates above average levels of maintenance provided by your maintenance contractor. This results in very good overall system performance and operational characteristics of the vertical transportation equipment. Equipment will have infrequent shutdowns due to maintenance-related problems. Approximately 10% of our equipment reviews result in this rating.
5	A rating of "5" indicates excellent levels of maintenance. This results in excellent system performance and reliability. We rarely see this level. Approximately 5% of our equipment reviews result in this rating.

End Maintenance Evaluation section.

DEFICIENCIES

Passenger Elevator 1		
Item	**Description** EV= Requires correction elevator vendor BR = Requires building responsibility N/A = Not Applicable to elevator	**Elevator1**
1.	Clean car top of dust and debris.	EV
2.	Clean and eliminate the oil leak under hoist machine.	EV
3.	Surface rust is visible on the door jambs, repair and paint door frames.	EV
4.	Rouging visible on hoist ropes, clean and lubricate per manufacturer's recommendation.	EV
5.	Complete the monthly fire tests and sign as complete in the firefighters log.	EV/BR
6.	Ensure correct elevator certificate in located in car.	EV/BR
7.	Hoistway Door Gib dragging on PH	EV
8.	MCP (Maintenance Control Program) Incomplete	EV
9.	Hoistway door escutcheons need adjustment for proper operation	EV

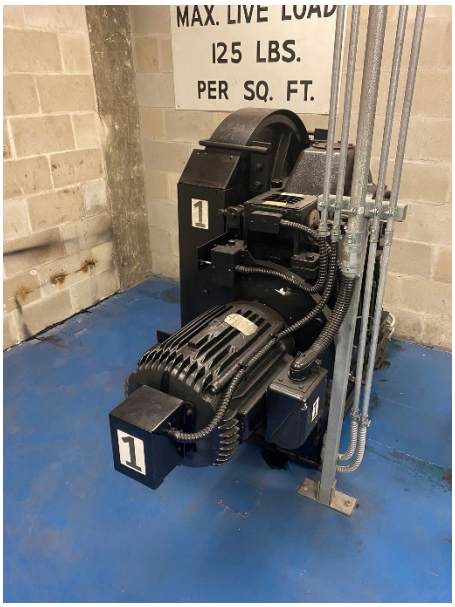
Passenger Elevator 2		
Item	**Description** EV= Requires correction elevator vendor BR = Requires building responsibility N/A = Not Applicable to elevator	**Elevator2**
1.	Clean car top of dust and debris.	EV
2.	The hall doors rub on hoistway equipment at floor G, adjust door equipment provide smooth operation.	EV
3.	PH level Hoistway door needs adjustment	EV
4.	Adjust the pit door.	EV
5.	Surface rust is visible on the door jambs, repair and paint door frames.	EV
6.	Rouging visible on hoist ropes, clean and lubricate per manufacturer's recommendation.	EV
7.	Complete the monthly fire tests and sign as complete in the firefighters log.	EV/BR
8.	Ensure correct elevator certificate in located in car.	EV/BR
9.	Car Riding Lantern Inoperable	EV
10.	MCP (Maintenance Control Program) Incomplete	EV
11.	Hoistway door escutcheons need adjustment for proper operation	EV

End of Deficiencies Section

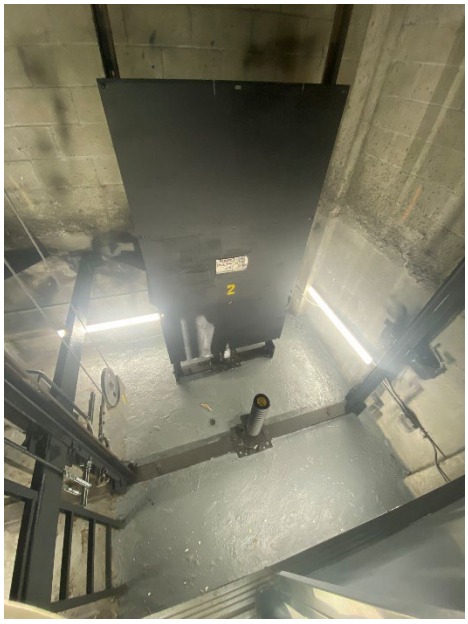
PHOTOS

Photos

[redacted], Assessment Report

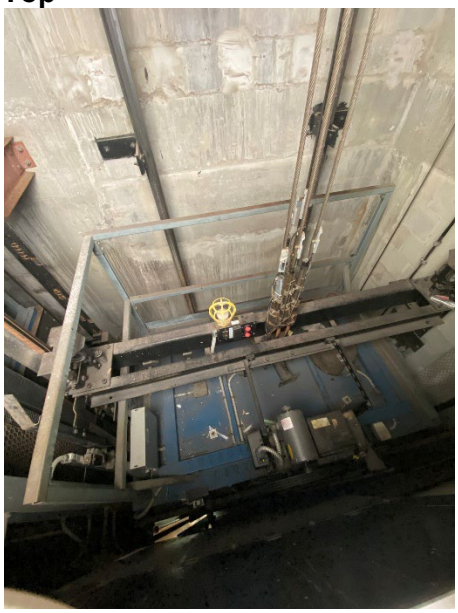
1. Controller  Car 1: TAC50 Controller	**2. Machine**  Car 1: Hoist Machine
3. Machine  Car 2: Hoist Machine	**4. Machine**  Car 1: Governor

5. Pit



Car 2: Elevator Pit

6. Car Top

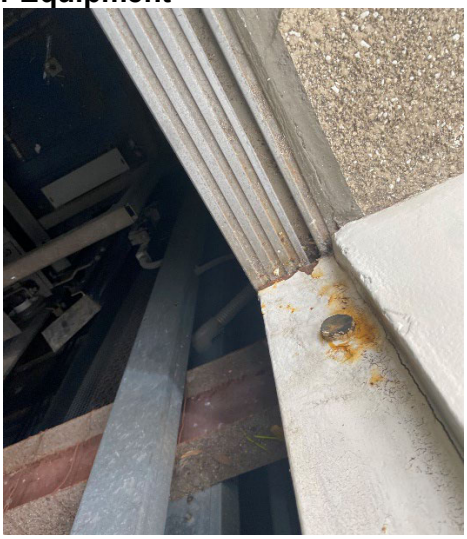


Car 1: Elevator car top

7. Cab Interior

Car 1: Cab interiors

8. Door Equipment



Car 2: Rust on door jambs

INVOICE AND CONTRACTUAL REVIEW SUMMARY

We were provided with some repair proposals and invoices from [redacted] for review including:

1. **Time and Material Work Order** dated September 30, 2024
   - Scope: Removal of pit water
   - Billing: Hourly rates applied
2. **Invoice No. 50002611370** dated October 9, 2024
   - Scope: Troubleshooting; found maintenance pump required to remove water and return unit to service
   - [redacted]
3. **Invoice No. 5002626870** dated October 24, 2024
   - Scope: Door detector damage due to water intrusion
   - [redacted]
4. **Invoice No. 5002626424** dated October 24, 2024
   - Scope: Scope: Troubleshooting following storm event. Elevators were found operating on emergency power. System was reset; a defective door edge on Elevator No. 1 was identified. Power was transferred to Elevator No. 2 and proper operation was verified.
   - [redacted]
5. **Invoice No. 6000759308** dated November 7, 2024
   - Scope: Removal of pit water
   - [redacted]
6. **Invoice No. 60007617790** dated November 22, 2024
   - Scope: Repair Work Order No. 2024-2-1791771 (Opportunity ID: ACIA-29HD2PH), dated October 17, 2024
   - Description: Hurricane Helene Phase 2 repairs
   - [redacted]
   - [redacted]

A review of the provided invoices in conjunction with the existing elevator maintenance agreement indicates that the majority of the charges are associated with water intrusion events and storm related impacts, including those attributed to Hurricane Helene. These conditions are significant in evaluating contractual responsibility.

The maintenance agreement is structured as a full service contract, requiring the elevator contractor to provide labor, materials, and replacement parts necessary to maintain the equipment in proper operating condition. However, the agreement also clearly outlines exclusions for repairs or services necessitated by conditions beyond the contractor's control, including but not limited to flooding, storm events, and other "acts of God." Additionally, the contract assigns responsibility to the building ownership for maintaining elevator pits in a dry and code-compliant condition.

Based on these provisions, costs associated with pit water removal, storm-related troubleshooting, and hurricane-related repair work are generally considered outside the scope of the base maintenance agreement and are therefore contractually justified as additional billable services. The frequency and recurrence of water intrusion events, however, suggest an ongoing building related condition that should be addressed to prevent continued impact to the elevator systems and avoid repeated service costs.

Certain repair items, such as component replacements, fall into a more nuanced category. While the contractor may attribute these failures to water exposure and therefore classify them as excluded work, the agreement also requires the contractor to furnish replacement parts as part of maintaining the equipment. As such, the justification for these charges is dependent upon clear documentation that the damage resulted directly from external conditions rather than normal wear or equipment failure.

In summary, the majority of the invoiced costs appear to be consistent with the contractual exclusions related to water intrusion and storm events and are therefore likely justified. However, select repair charges may warrant further review and supporting documentation to confirm proper classification under the terms of the agreement. Continued water infiltration into the elevator pits represents a primary contributing factor and should be addressed as part of a broader building maintenance or capital improvement plan.

SUPPORTING DOCUMENTATION

METHODOLOGY

A. SUMMARY

To complete the scope of work included in the agreement, ATIS took the following specific steps to evaluate the equipment and formulate the results. These activities have formed the analysis and the opinions offered herein:

- ✓ A site visit to each property was conducted.
  - Physical inspection of each piece of vertical transportation equipment
  - Internal inspections of geared machine ring and worm gear condition.
- ✓ Visual evaluation of the elevator equipment in each area to determine the level of preventive maintenance and operation:
  - Hoistways,
  - Car tops, and
  - Pits
  - Machine rooms
  - Elevator Lobbies.
- ✓ These visual evaluations included observation of the operation of equipment including:
  - Hoistway doors,
  - Interlocks,
  - Hangers, and
  - Door gibs.
- ✓ An evaluation of the quality of the following was performed:
  - Housekeeping,
  - Level of lubrication, and
  - State of repair.
- ✓ In addition to visual evaluations, a review of the inspection records and historical callback data were reviewed.

Recommendations are based on field observations while onsite, accumulative industry experience, and knowledge about various systems and system components support. In conjunction with stakeholder feedback, the scoring and reporting is based on the following criteria.

B. CRITERIA

In order to evaluate the life span of the vertical transportation equipment and to prioritize the equipment upgrades or modernization sequence for capital planning purposes, ATIS evaluated seven critical areas for criteria. Each of these criteria was assigned a numerical score based upon our evaluation. Each criterion was prioritized for its impact on the modernization sequence. For example, two of the criteria, “Age” and “Parts Availability” are weighted most heavily due to their potential to detrimentally impact the overall system reliability and uptime in the building. Those pieces of vertical transportation equipment receiving the lowest numerical scores were determined to be those requiring earlier modernization than equipment receiving a higher score. This low score for poor condition approach is used in a number of State, Federal and Governmental rating systems such as the Transit Economic Requirements Model (TERM)

used by the Federal Transit Administration (FTA) in their evaluation of State of Good Repair (SGR) for their assets. A detailed description of each criterion follows:

i. Age:

Age criterion is a numerical expression of the age of the equipment. It is axiomatic that mechanical equipment is subject to deterioration as it ages. This criterion is an expression of that deterioration related to age. It is important to note that this criterion is weighted relatively lower than other criterion because it is only an expression of chronological age. It does not consider the usage of the equipment during its lifetime. The following numerical ranges are employed:

1. Equipment Age		
Traction	**Hydraulic**	**Rating**
≤ 5 years	≤ 5 years	5
5 – 10 years	5 – 15 years	4
10 – 20 years	15 – 20 years	3
20 – 25 years	20 – 30 years	2
25+ years	30+ years	1

ii. Current Condition/Accumulated wear:

Equipment Condition/Wear criterion evaluates the observed condition of the equipment in its current state. Factors influencing this criterion include the quality of preventative maintenance performed on the equipment including housekeeping and lubrication. The following numerical ranges are employed:

2. Equipment Condition/Wear	
Excellent	5
Good	4
Poor	3
Rebuild/refurbish	2
Replace	1

iii. Design / Inherent Quality:

Design/Inherent Quality criterion evaluates the known quality and overall original manufacturer's inherent design. Several designs over the past years have proven to be poor quality or bad design. Some have been excellent and run reliably for many years. The following numerical ranges are employed:

3. Design / Inherent Quality	
Premium quality	5
Improved quality	4
Average/industry standard	3
Below average, short life cycle	2
Poor	1

iv. Facility Operations Factor/Usage:

Facility Impact/Usage criterion evaluates the usage from a visual onsite review of vertical transportation equipment in operation, the dispatching frequency of the units and the transportation effectiveness of the group. University feedback also plays an important role in determining which elevator groups are more heavily used, based on hospital programming and campus activity. This criterion is an expression of the impact that property occupants would experience should the piece of equipment be out of service. For example, patient transport elevators leading to operating rooms, or a helipad are often the most critical to the facility and are therefore given the highest numerical score. The following numerical ranges are employed:

4. Facility Operations/Usage	
Low Impact/ use	5
Below average impact/ use	4
Average Impact/Use	3
Above average impact/use, early wear	2
High impact, high usage, more than designed for	1

v. Environmental Conditions:

Environmental Conditions criterion is based upon a review of the environmental conditions in each building. Environmental conditions affect the overall lifecycle duration for elevator equipment. For example, machine rooms with heavy moisture and inoperable HVAC, or ventilation, will degrade more rapidly than equipment stored in cool dry areas. The following numerical ranges are employed:

5. Environmental Conditions	
Excellent; clean with HVAC	5
Good environment; cool and dry	4
Average environment, ventilated machine room, etc.	3
Poor environmental conditions	2
No HVAC, humidity condensing	1

vi. Parts Availability:

Correlating to the “Age” criterion, Parts Support & Availability / Obsolescence reflects the fact that as equipment ages, Original Equipment Manufacturers (OEMs)and after-market providers maintain a diminishing stock of spare parts. The unavailability of spare parts results in longer periods in which equipment is out of service while parts are searched for or shipped from differing geographic locations. Ultimately, older equipment will eventually be declared “obsolete” by the service provider. Obsolete equipment is equipment for which replacement components are no longer widely available by either the OEM or aftermarket providers. Some obsolete components can be sent out for repair but will often have no warranty on repaired components. The following numerical ranges are employed:

6. Parts Support & Availability / Obsolescence	
Readily available	5
6 – 10 years	4
1 – 5 years	3
Repair only	2
Obsolete	1

vii. Reliability:

Callbacks / Reliability is based upon a review of the number of "callbacks" and "entrapments". Callbacks are an industry term describing a piece of equipment which has experienced an unplanned stoppage in service and for which an elevator mechanic was required to visit the property to restart or troubleshoot the equipment. An entrapment is a callback in which a person or persons were using the elevator at the time it stopped working and in which the people were unable to evacuate the elevator without the assistance of an elevator mechanic or first responder. Feedback on current callbacks was provided by Engineering. The following numerical ranges are employed:

7. Callbacks / Reliability	
<4 /unit/year	5
4 – 6/unit/year	4
7 – 8/unit/year	3
8 – 10/unit/year	2
11+/unit/year	1

Scoring by Importance

Based upon stakeholder feedback and our experience in similar facilities, the following numerical ranges were employed on the scale of 1-5 points:

Scoring by Importance			
A. Age	3	E. Design Quality	3
B. Condition / Wear	4	F. Facility Operation Usage	3
C. Parts Availability/ Obsolescence	5	G. Current reliability	5
D. Environmental Conditions	3	Total Score	26

End Methodology Section.

APPENDIX A – SCORING RUBRIC

Scoring Rubric

Equipment Age		
Traction	Hydraulic	
≤ 5 years	≤ 5 years	5
5 – 10 years	5 – 15 years	4
10 – 20 years	15 – 20 years	3
20 – 25 years	20 – 30 years	2
25+ years	30+ years	1

Equipment Condition / Wear	
Excellent	5
Good	4
Acceptable	3
Rebuild/refurbish	2
Replace	1

Design / Inherent Quality	
Premium quality	5
Improved quality	4
Average/industry standard	3
Below average, short life cycle	2
Poor	1

Facility Operations /Usage	
Low use	5
Below average use	4
Average	3
Above average use, early wear	2
High usage, more than designed for	1

Environmental Conditions	
Excellent; clean with HVAC	5
Good environment; cool and dry	4
Average environment, ventilated machine room, etc.	3
Poor environmental conditions	2
No HVAC, humidity condensing	1

Parts Support & Availability / Obsolescence	
Readily available	5
6 – 10 years	4
1 – 5 years	3
Repair only	2
Obsolete	1

Callbacks / Reliability	
>4/unit/year	5
4 – 5/unit/year	4
6 – 7/unit/year	3
8 – 10/unit/year	2
>=11/unit/year	1

Scoring By Importance			
Age	1	Design Quality	5
Condition	2	Facility Usage	6
Parts Availability	3	Current Reliability	7
Environmental	4	Best Total Score	35