

**YOUR LOGO HERE**

# **Mechanical Preventative Maintenance Service Plan**

Created for

**Company ABC**

Month/Day/Year

This Preventative Maintenance Service Plan was created by Company ABC as a bid proposal for Client 123 and their representatives. This Company ABC PM Service Plan may not be copied or distributed in whole or in part to people other than those noted above without the expressed written consent of Company ABC.

Company Address

- Sample Preventative Maintenance Agreement -

**YOUR LOGO HERE**

# **INDEX**

Page 1	Title Page and copy write
Page 2	Index
Page 3	Cover Letter
Page 4	Work Included
Page 5	Scope of Work in detail of PM Service Plan
Page 6	Continued from page 5.
Page 7	Schedule A (Labour calculation costs for provision of service)
Page 8	Schedule B (Material calculation costs included in proposal) and Price of contract per visit.
Page 9	Closing Letter

## YOUR LOGO HERE

Hello Dan,

Thank you for allowing Company ABC to bid this Preventative Maintenance Service contract to you. I cannot ensure that we will be the lowest price, but I can guarantee you that we are the best value. The value I am talking about has been written down for you in great detail in this Company ABC Preventative Maintenance Service Plan. Through our concentrated PM plan Client 123 will save money with energy savings and also by extending the life of the building's heating equipment.

Other Company ABC clients include...

Respectfully,

---

Your Name  
Service Manager  
Company ABC

**YOUR LOGO HERE**

## **WORK INCLUDED**

1. Upon Company ABC's bid proposal being accepted we will provide a maintenance contract to the Client 123 .
2. Schedule of work has been written out by multiple visits per year and annual visits per year in Schedule A.
3. Company ABC Maintenance Forms shall be used and recorded for each piece of equipment. Company ABC will provide a log book for the equipment, which will be left on-site.
4. A Company ABC recommendation report shall be completed upon each visit. With current equipment status, deficiencies and recommendations for repairs. Cost estimates can be provided if requested.
5. All equipment shall be maintained by qualified Company ABC Personnel.

Company Address

- Sample Preventative Maintenance Agreement -

## **Detailed Scope of Work for PM Service Plan**

1. Make-up-Air (MUA-1) basement unit Dunham-Bush. On each visit, 4 times per year, Company ABC will visually inspect the unit's mechanical parts, change the filters, grease the motor (as per manufactures recommendation), and verify damper operation. On each annual visit Company ABC will change the belt, align the pulley and clean the combustion chamber, burner and interior of the unit. Once per year on the annual visit Company ABC shall perform a combustion analysis to obtain maximum efficiency of the unit.
2. Roof top unit (RTU-1) Engineered-Air DJ-140-0. On each quarterly visit, Company ABC will visually inspect the unit and thermostat, change the filters, and grease the motor and bearings if required. Verify the function of the ignition system and safety devices. On each annual visit, Company ABC will change the belt, adjust gas pressure and perform a combustion analysis to obtain maximum efficiency.
3. Roof top unit (RTU-2) Engineered-Air DJ-140-0. On each quarterly visit, Company ABC will visually inspect the unit and thermostat, change the filters, and grease the motor and bearings if required. Verify the function of the ignition system and safety devices. On each annual visit, Company ABC will change the belt, adjust gas pressure and perform a combustion analysis to obtain maximum efficiency.
4. Roof top unit (RTU-3) Lennox GCS16-048-756Y with cooling. On each quarterly visit, Company ABC will visually inspect the unit and thermostat, change the filters, and grease the motor and bearings if required. Verify the function of the ignition system and safety devices. On each annual visit, Company ABC will change the belt, adjust gas pressure and perform a combustion analysis to obtain maximum efficiency. On each spring visit Company ABC will have the cooling components inspected to ensure function and effectiveness.
5. Roof top unit (RTU-4) Lennox GCS16-048-756Y with cooling. On each quarterly visit, Company ABC will visually inspect the unit and thermostat, change the filters, and grease the motor and bearings if required. Verify the function of the ignition system and safety devices. On each annual visit, Company ABC will change the belt, adjust gas pressure and perform a combustion analysis to obtain maximum efficiency. On each spring visit Company ABC will have the cooling components inspected to ensure function and effectiveness.
6. Roof top unit (RTU-5) Lennox GCS16-048-756Y with cooling. On each quarterly visit, Company ABC will visually inspect the unit and thermostat, change the filters, and grease the motor and bearings if required. Verify the function of the ignition system and safety devices. On each annual visit, Company ABC will change the belt, adjust gas pressure and perform a combustion analysis to obtain maximum efficiency. On each spring visit Company ABC will have the cooling components inspected to ensure function and effectiveness.
7. Roof top unit (RTU-6) Lennox GCS16-048-756Y with cooling. On each quarterly visit, Company ABC will visually inspect the unit and thermostat, change the filters, and grease the motor and bearings if required. Verify the function of the ignition system and safety devices. On each annual visit, Company ABC will change the belt, adjust gas pressure and perform a combustion analysis to obtain maximum efficiency. On each spring visit Company ABC will have the cooling components inspected to ensure function and effectiveness.

## YOUR LOGO HERE

8. 6 - Furnaces. On each quarterly visit Company ABC will change each furnace filter, inspect the ignition and combustion components, and inspect combustion and fresh air supply. Check the motor; as well as ensure adequate motor lubrication. On each annual visit, each furnace will undergo an extensive inspection and cleaning. This will verify the unit's function and safety controls, improve the longevity and efficiency of the furnace as well as increase building comfort. A combustion analysis will be performed annually to ensure maximum efficiency and safety is provided.
9. Hot Water Tank (HWT-1) A.O Smith. On each quarterly visit Company ABC will inspect the unit, and combustion components, relief valve and thermostat. On each annual visit, Company ABC will flush the tank to remove sediment, clean the combustion chamber and burner as well as perform a combustion analysis to maximize efficiency.
10. Hot Water Tank (HWT-2) A.O Smith. On each quarterly visit Company ABC will inspect the unit, and combustion components, relief valve and thermostat. On each annual visit, Company ABC will flush the tank to remove sediment, clean the combustion chamber and burner as well as perform a combustion analysis to maximize efficiency.
11. Exhaust Fan (EF-1). On each quarterly visit, Company ABC will inspect the unit for excessive vibration and alignment. Lubricate as necessary, check the belt, and change the filter (if required). On each annual visit, Company ABC will clean the unit and change the belt.
12. Exhaust Fan (EF-2). On each quarterly visit, Company ABC will inspect the unit for excessive vibration and alignment. Lubricate as necessary, check the belt, and change the filter (if required). On each annual visit, Company ABC will clean the unit and change the belt.
13. Return Air Fan (RAF-1). On each quarterly visit, Company ABC will inspect the unit for excessive vibration and alignment. Lubricate as necessary, check the belt and change the filter. On each annual visit, Company ABC will clean the unit and change the belt.
14. Return Air Fan (RAF-2). On each quarterly visit, Company ABC will inspect the unit for excessive vibration and alignment. Lubricate as necessary, check the belt and change the filter. On each annual visit, Company ABC will clean the unit and change the belt.
15. General Plumbing. On each quarterly visit, Company ABC will inspect all of the plumbing fixtures for general function and defects. Also water savings and efficiency will be inspected to reduce costs.

Company Address

- Sample Preventative Maintenance Agreement -

**YOUR LOGO HERE**

## **SCHEDULE A**

<b>Item Number</b>	<b>Multiple visits per year x labour + labour for annual visit</b>	<b>Total</b>
1	(4 visits x 30min) + (1 visit x 1Hr) =	3.0 Hours
2	(4 visits x 30min) + (1 visit x 1Hr) =	3.0 Hours
3	(4 visits x 30min) + (1 visit x 1Hr) =	3.0 Hours
4	(4 visits x 30min) + (1 visit x 1Hr) =	3.0 Hours
5	(4 visits x 30min) + (1 visit x 1Hr) =	3.0 Hours
6	(4 visits x 30min) + (1 visit x 1Hr) =	3.0 Hours
7	(4 visits x 30min) + (1 visit x 1Hr) =	3.0 Hours
8 (total for 6 furnaces)	(4 visits x 1.5Hr) + (1 visit x 4.5 Hr) =	10.5 Hours
9	(4 visits x 10min) + (1 visit x 30min) =	1.1667 Hours
10	(4 visits x 10min) + (1 visit x 30min) =	1.1667 Hours
11	(4 visits x 10 min) + (1 visit x 20min) =	1.0 Hours
12	(4 visits x 10 min) + (1 visit x 20min) =	1.0 Hours
13	(4 visits x 10min) + (1 visit x 20min) =	1.0 Hours
14	(4 visits x 10 min) + (1 visit x 20min) =	1.0 Hours
15	(4 visits x 15 min) =	1.0 Hours
Totals		38.83 Reg. Time 0.0 Over Time

38.83 Hours Regular time x \$00.00 per hour = \$0,000.00  
0.0 Hours Overtime x \$000.00 per hour = \$ 0.00  
Annual Total Labour cost = \$0,000.00

YOUR LOGO HERE

## SCHEDULE B

1. Fifteen Combustion Gas Analysis per year. (6-Furnaces, 1-MUA, 6-RTU's, 2-HWT's) \$00.00 equipment fee per test.	= \$ 000.00
2. 11 Belts x 0.00 each x 1 replacement per year (For each Furnace, MUA, RTU, RAF and EF)	= \$ 00.00
4. Filters – We do not know the number or type of filters required for your units, so this cost will be added after the first visit.	= \$ 0.00
5. Refrigeration inspection – 4 cooling units x 000.00 per inspection.	= <u>\$ 000.00</u>
Total Material cost	= \$0.000.00

Total annual labour cost (\$0,000.00) + Total annual material cost (\$0.,000.00) =  
Total annual cost of contract (\$0,00.00) divided by 4 visits per year =

**Total Cost per visit \$0,000.00**

All other materials are not included in the price of this proposal.

## YOUR LOGO HERE

April 21, 2009

Sir, I would again like to thank you and Client 123Church for allowing Company ABC to bid this preventative maintenance contract. I guarantee to you that Company ABC will perform this contract with professionalism, honesty and Company ABC will complete all work within our high standards.

As a preventative maintenance client of Company ABC, Client 123 will automatically become a preferred client. This entitles Client 123 to a reduction in labour (\$94.00/Hr.) on all work except what is outlined in this preventative maintenance agreement. Client 123 will also receive Company ABC's 24 hour emergency service, at a rate of \$000.00 per hour, 365 days per year (including Christmas Day). The goal of Company ABC's service is to provide a 1 hour response time to all preferred client emergencies.

Also as a preferred client Company ABC will test all backflow devices once per year and submit a report to the City of Calgary on your behalf at a reduced price of \$00.00 per backflow device.

Sincerely,

---

Your Name  
Service Manager  
Company ABC