

The EcoWise IPM Contracting Tool Kit for Developing a Structural IPM Program and Contracting for Structural IPM Services

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I. INTRODUCTION

Integrated Pest Management (IPM) is a systematic approach that combines pest prevention with other management techniques that often lead to a reduction in pesticide use. Because IPM is perceived as desirable, public agencies are increasingly being challenged by regulatory agencies and the general public to implement IPM programs and hire technically proficient IPM service providers. We have produced this Tool Kit to help public agencies succeed with these two tasks.

Focus of the EcoWise IPM Contracting Tool Kit

This Tool Kit focuses on structural IPM, which involves household pests, such as ants, cockroaches, rats, and mice, that cause problems inside and around structures. The IPM concepts and much of the information in this Tool Kit can also be used to develop IPM programs for landscape pests. Landscape IPM, however, is more complex, and the pests encountered, the IPM treatment strategies used, and the pesticides that might be applied are different.

What the EcoWise IPM Contracting Tool Kit Covers

The Tool Kit was designed for a public agency making the transition from conventional structural pest control to IPM. We have included information on key elements of an IPM policy statement, descriptions of the roles and responsibilities of a public agency when working with an outside IPM service provider, and information on contracting for IPM services.

Who Can Use the EcoWise IPM Contracting Tool Kit

Although this Tool Kit was developed for public agencies in California, it can be adapted to the needs of many other entities, both in California and in other states. Private businesses, hospitals, nursing homes, day care centers, and homeowner associations will all find this Tool Kit useful for developing an IPM program and contracting for IPM services. The Tool Kit will also be an important resource for any organization with an IPM program already in place and/or for those with in-house staff providing IPM services.

EcoWise IPM Contracting Tool Kit Terms

In the Tool Kit we will be referring to IPM Policy, IPM Program, IPM Process, IPM Action Plan and Urban IPM. To avoid confusion, we have described what we mean by each of these, below.

- **IPM Policy.** An IPM Policy is the set of goals and principles adopted by your agency, or a higher authority such as city council or county board of supervisors, that guides decisions and actions in your IPM Program.¹

¹ For local governments, an **ordinance** is a law passed by a city council or county board of supervisors that is codified in municipal codes. A **resolution** is a written motion adopted by a local government (or other body) endorsing a concept, **policy**, or authorizing action. A **policy** is a plan of action to guide decisions and achieve rational outcome(s). While an ordinance can compel or prohibit behaviors, policies guide actions toward those that are most likely to achieve a desired outcome.

- **IPM Program.** An IPM Program is the collection of activities that reflect your agency's commitment to implementing the IPM Policy. Your IPM Program includes managing pests (and people, too!), record keeping, reporting, budgeting, training staff, and evaluating the Program. Your IPM Program will have many human components as well, such as, an IPM coordinator who coordinates and advocates for the Program and disseminates IPM information; the service provider who advises you on pest problems and controls pests; the custodial service that can either help or hinder your efforts to remove sources of food for pests; agency staff, who may be the source of pest problems and therefore will be critical in helping solve those problems; and perhaps an IPM consultant who is hired on an as-needed basis to help research and advise on technical issues or on public and staff education and outreach.
- **IPM Process.** The IPM Process (or IPM approach) is a series of continuous and interrelated steps that helps the pest manager decide how to deal with a pest problem. IPM is a decision-making process that guides pest managers toward efficient, effective, and sustainable pest management that emphasizes pest prevention and non-chemical methods.

The decision to apply treatments for a pest (whether educating building occupants, sealing entry holes, vacuuming up insects, or applying a pesticide) is made after a thorough inspection that gathers information about the pest and about the people and the structure involved. Treatment options are reviewed for appropriateness, and a variety of control strategies are integrated into a written plan of action. After the treatment is applied, the problem is monitored to determine success and to fine-tune the treatment process, if necessary. Records are kept throughout the process to document inspections, decisions, and outcomes.

This process has been written about widely, and in the integrated pest management community there exists a general consensus about what the process entails. In this Tool Kit, we will be referring to the [EcoWise IPM Process](#). The *Process* was derived from the [EcoWise Certified Standards for IPM Certification in Structural Pest Management](#), which form the core of EcoWise Certified, an independent, third-party IPM certification program. The *Process* offers an easy-to-read synopsis of the EcoWise Certified standard IPM process for IPM program coordinators, managers, and their staff. Visit www.EcoWiseCertified.org for more information about the program.

- **IPM Action Plan.** In this Tool Kit, IPM Action Plan will refer to the plan of action to manage pests at a particular location. This will include how frequently the service provider will inspect the site, the kinds of equipment and methods used to monitor and control pests, the kinds of pesticides and pesticide application equipment that will be used if pesticides become necessary, and descriptions of structural and operational changes that would facilitate pest control. The IPM Action Plan should be developed by the service provider after an initial inspection of the site and should be reviewed by agency personnel experienced in structural IPM (ideally, an IPM coordinator).
- **Urban IPM.** We will use this term to refer to both structural and landscape IPM. Although we focus on structural IPM in this Tool Kit, your IPM Policy and your IPM Program may include both structures and landscapes.

II. ESTABLISHING AN IPM POLICY

California's Regional Water Quality Control Boards regulate stormwater under authorities of the federal Clean Water Act and California's Porter-Cologne Water Quality Control Act. The Boards issue permits to dischargers of municipal and industrial stormwater runoff. Increasingly these permits require municipalities to practice IPM. Asking your elected officials to adopt an IPM policy or pass an IPM resolution will better assure that you receive the budget and backing to implement an IPM program. The Policy clarifies the reasons for adopting an IPM approach and establishes the goals and principles of the program. The details of how pests are to be managed at particular sites belong in the IPM Action Plan. Your IPM Policy should be a flexible document that can change as your IPM Program matures and new information is acquired.

Elements to Consider for an IPM Policy

You may not need or want to include all the elements below in your Policy. Some of them may fit better in a description of your IPM Program. We provide sample language for each element. You may also wish to look at [policies of other agencies](#) for additional ideas.

A. Objectives/Goals

Sample language:

The purpose of this IPM Policy is to effectively and efficiently control pests, enhance the health and safety of our employees and the public, and reduce the potential for surface water contamination caused by unnecessary pesticide applications. It will be our policy to focus on pest prevention and long-term suppression of pest problems with minimum impact on human health, non-target organisms, and the environment.

B. Definitions (e.g., for IPM, pest, pesticide, tolerance level, etc.)

Definitions can be found in the [EcoWise IPM Process](#).

C. Staff/Jurisdictions/Areas affected by the IPM Policy

Sample language:

All agency staff and property along with any contractors hired to perform pest management will be subject to this policy.

D. Designation of a Position for IPM Coordinator

The IPM coordinator will coordinate implementation of the IPM Program. If you wish to include responsibilities for the coordinator, see Section III.B in this document for more information about this position.

E. Requirement for Each Department or Site to Designate an IPM Liaison

Sample language:

Each department will designate an IPM contact within the department to assist in the coordination of the IPM Program.

F. IPM Process/IPM Approach

This is the general process that will be used to manage pests. We strongly recommend that you include the [EcoWise IPM Process](#) in your IPM Policy. It was developed specifically to help public agencies with their IPM Programs.

G. Acceptable Methods for Applying Pesticides, if they become necessary

The [EcoWise IPM Process](#) provides a comprehensive description of acceptable methods.

H. Criteria for Assisting in the Selection of Pest Management Methods

Sample language:

If treatment for a pest is deemed necessary, the method(s) chosen should meet the majority of the following criteria: least hazardous to human health, least toxic to non-target

organisms, least damaging to the general environment, least disruptive of any natural enemies of the pest, most likely to produce long-term reduction of the pest, easiest to carry out effectively, most cost-effective in the short- and long-term.

I. Notification of Pesticide Use

Procedures for posting, and criteria for exemptions from posting, vary widely. You may want to [look at policies from other agencies](#) for examples.

Sample language from the California Healthy Schools Act is as follows:

- *Warning signs must be posted 24 hours before a pesticide application and kept up for 72 hours afterward.*
- *Signs must prominently display the words, “Warning – pesticide-treated area,” and must include the product name, manufacturer’s name, the U.S. EPA’s product registration number, scheduled date and areas of application, and reason for the application (that is, the target pest). The law does not specify text, color, or size of lettering, but the sign must be visible to anyone entering a treated area.*

The word “Warning” on the sign does not refer to the pesticide toxicity signal words (danger, warning, caution), but is universal language for “Watch out!” You can download sample warning signs in English and Spanish from California’s Department of Pesticide Regulation’s school IPM site. Go to apps.cdpr.ca.gov/schoolipm/ and click on “Tools & Templates” in the column on the left, then click on “Pesticide Sample Application Warning Sign.”

J. Procedures for the Use of Pesticides in an Emergency Situation

Sample language:

No spray insecticides may be used except insecticidal soaps and plant-based products (e.g., pyrethrins, mint oil, rosemary oil, etc.). The Agency’s IPM Coordinator may authorize emergency use of other pesticides.

K. Reporting and Record-keeping Requirements

Requirements vary and will depend on the needs of your agency. We recommend, however, that you only require data that you will actually analyze and use. For pesticide use, it is likely that most of the information you will need is being reported to the County Department of Agriculture in the Pesticide Use Report that your service provider is required to file each month (in California). Note that these reports do not describe the location of an application. We recommend that you require your IPM service providers and staff to add “location” (e.g. building address and floor, or other specific location) to reports prepared for your agency.

Especially in a landscape situation, it may be desirable to also track treatments that do not involve pesticides.

L. Commitment to IPM Education

Sample language:

Changing people’s behavior in regard to pest control requires much more than a carefully worded policy. All people impacted by this IPM policy, including department heads, facilities managers, custodians, and building occupants, must understand the nature of this agency’s IPM program and the role they each play in preventing and managing pests in their own work environment.

M. Pesticide Lists

Some IPM policies may restrict pesticides applied to those on a list of pesticides compatible with an IPM Program. Visit www.EcoWiseCertified.org and

http://www.sfenvironment.org/downloads/library/20100420_sf_pesticide_list_red_legged_frog.pdf (San Francisco Department of the Environment) for examples of pesticide lists.

Less frequently, agencies include a list of pesticides that are prohibited or restricted.

N. Designation of an IPM Committee

This committee can provide technical assistance to the IPM Coordinator and might include experts such as the agency's IPM service provider, a health officer with experience in pesticide issues, a facilities manager, a landscape manager, a roadside vegetation manager, and a concerned citizen.

Click here to view [IPM policies](#) from a variety of cities and counties. When looking at these policies, please be aware that different terms may be used for the elements described above. [Contra Costa County](#) (California), [City of Corte Madera](#) (California), [City of Fremont](#) (California), [City of Palo Alto](#) (California), [San Diego County](#) (California), [City of Boulder](#) (Colorado), [Whatcom County](#) (Washington).

III. IMPLEMENTING AN IPM PROGRAM

For a successful IPM Program, you will need commitment and support from decision makers in your agency down through the agency hierarchy to building occupants. You will also need a good IPM contract with a knowledgeable IPM service provider. In smaller organizations where in-house staff performs pest control, those employees must be knowledgeable about IPM.

A. The Primary Responsibility for Pest Control and a Successful IPM Program Rests with the Agency

Even when you hire an IPM service provider, the primary responsibility for controlling pests on your agency's property remains with your agency. This is because the agency controls and manages most of the key assets that are crucial for managing pests at a property: the property itself; the staff working on the property; contractors bringing in goods to the property that may contain pests or cause pest problems; and other service vendors or in-house staff who manage sanitation and the landscape, both of which are frequent sources of pest problems for the structure.

The role of the agency includes the following:

Determining the goals of the IPM program and communicating these to the IPM service provider. The following are examples of goals:

- Protect the structure and its contents from undue damage from pests
- Control pests for reasons of sanitation and health
- Prevent or reduce pesticide run-off into storm drains
- Meet a particular regulatory standard required by USDA or FDA
- Ensure that staff are not bothered by nuisance pests at their work stations
- Minimize staff exposure to pesticides

Determining the scope of work, which includes the categories of pests to be covered, tolerance levels for pests, service frequencies, response times, and payment for service and work beyond the original scope of service.

Committing personnel and resources to administer the IPM Program internally. Key to a successful IPM Program is having an IPM coordinator.

Integrated Pest Management is not a service that can be delivered by contract. Conventional pest control can be delivered by contract, but IPM must involve the IPM service provider and everyone in the agency.

B. The IPM Coordinator

Without someone to coordinate your IPM Program (at least part-time), it will be haphazardly and ineffectively implemented. This person *must* be experienced in urban IPM or be able to contract for outside expertise. The IPM coordinator can be a new position, a consultant, or the responsibilities can be added to the duties of an existing staff member, as long as the person has sufficient IPM knowledge and time for the job. The person should be organized and dependable, have good interpersonal and communication skills, and be enthusiastic.

The IPM coordinator should be responsible for the following kinds of duties:

1. Lead the procurement of pest control services, oversee the contract, and represent the interests of the agency in pest control matters
2. Coordinate IPM activities to ensure compliance with the agency's IPM Policy
3. Act as the primary agency contact for the IPM service provider
4. Provide IPM expertise for the Program
5. Advocate internally for the IPM Program

6. Coordinate IPM education activities to ensure an awareness of the IPM Program throughout the agency and an understanding of the responsibilities required of building occupants and other staff
7. Coordinate IPM technical training for agency staff who require it
8. Coordinate with custodial, building maintenance, and grounds maintenance staff to ensure implementation of pest prevention measures
9. Work with agency staff to prioritize IPM tasks to promote effective and efficient use of agency funds
10. Provide oversight and guidance for staff engaged in pest management activities
11. Oversee record keeping and record retention, and conduct Program evaluations
12. Respond to inquiries and complaints from employees and the public
13. Assist in developing design guidelines and procedures for considering pest control implications for new construction or new landscaping and for renovation of buildings and landscapes
14. Chair a IPM Technical Advisory Committee
15. Develop incentives and provide recognition for agency staff who contribute to a successful IPM Program

C. The IPM Liaison(s)

If you have more than just a few small buildings, you will need to designate a person at each site who will be the IPM contact for the site. The building occupants, who are in the building every day and who are often the first to observe pest problems, are very valuable to the IPM Program. They help the IPM coordinator in his or her job and greatly extend the ability of the IPM service provider to effectively monitor the site.

This function, as IPM liaison, often fits well within the responsibilities of the building manager or lead building maintenance staff. If that is not an option, the staff person chosen as liaison should be interested in the health and cleanliness of their building, should have pride in their building, and/or should be enthusiastic about pest prevention and minimizing pesticide use.

We recommend the following responsibilities for the IPM liaison:

1. Record requests for pest management services from the building occupants. Typically this information would be recorded in a [pest management log book](#) provided by the IPM service provider. The service provider will have the ultimate responsibility for keeping this log up-to-date with both the requests for service and the actions taken to solve the problems.
2. Maintain a file of prevention and management tips for specific pests to fax, email, or hand deliver to staff experiencing pest problems
3. Work with staff to reinforce pest prevention and pest management education coming from the IPM coordinator or the IPM service provider
4. Notify the IPM Coordinator if pest proofing repairs are not performed in a timely manner

D. The IPM Service Provider

A qualified IPM service provider, an IPM coordinator, and a clearly written IPM contract are the most important elements of your IPM Program.

The following are the responsibilities of the IPM service provider:

1. Identifies pests and conducive conditions for current or potential pest infestations

2. Makes recommendations for implementing a comprehensive management plan
3. Evaluates recommendations in cooperation with your agency, taking into account your agency's pest tolerance levels, financial considerations, desired involvement in day-to-day pest management, and other factors which will influence the final IPM Action Plan for a particular agency or site
4. Implements IPM Action Plans on behalf of, and in cooperation with, the agency and its IPM coordinator by using a wide variety of tactics, such as:
 - Making recommendations for better sanitation and other preventive measures. In some cases, as determined by the contract, the IPM service provider may perform some prevention activities (e.g., trimming vegetation away from a building)
 - Providing informal education to building occupants and other staff on why the structure is experiencing pest problems and how occupants and staff can help prevent problems in the future
 - Monitoring and inspecting for current and potential pest problems
 - Setting up and monitoring mechanical devices to control pests
 - Making recommendations for structural repairs and modifications. In some cases, as determined by the contract, the IPM service provider may make minor repairs (e.g., closing holes that give rats access to the structure)
 - Using other tools, such as traps, steam, or a vacuum, to control and manage the target pests, and when necessary, applying least toxic pesticides, according to the agency's written IPM Process

IPM requires more skill and knowledge than conventional pest control and many contractors may not be capable of providing quality IPM services. It is important to hire a qualified service provider. If a reputable independent, third-party IPM certification program is available in your area, require that your IPM service provider be certified. This will make screening applicants easier.

The following are examples of independent, third-party IPM certification programs: www.EcoWiseCertified.org (available in California) and www.greenshieldcertified.org (available nationwide).

For a detailed discussion of qualifications for IPM service providers, see Section VII, below, *How to Structure a Request for Proposal for IPM Services*.

Note: If in-house staff or your conventional pest control provider will be handling your IPM service, they should be knowledgeable about IPM and be able to do the tasks listed above. If not, your agency should support their obtaining outside expertise and training as needed and encourage in-house IPM staff, or your conventional service provider, to pursue independent, third-party IPM certification.

E. Piloting an IPM Program

If you are just beginning to implement a structural IPM Program, consider piloting an IPM Program at one or a few facilities. Starting out small will make it easier to secure cooperation from agency staff and allow all personnel involved to quickly gain experience and build success. You can then expand to other facilities as resources allow and your experience increases. The lessons you learn in your small project will be invaluable as you expand.

The following are the first steps you will need to take to set up your pilot IPM Program:

1. Hire an IPM Consultant to help you get your IPM Program up and running.
The consultant will be responsible for providing technical expertise, overseeing the pilot, and providing training for your staff and your contractors.
2. Create an IPM Policy
The IPM consultant can help you develop a policy if you don't have one.
3. Designate a Pilot IPM Coordinator
This can be one of your staff who is interested in pest management, is willing to learn, and who has time for the extra responsibilities. These responsibilities will be fewer and somewhat different from those listed above under IPM coordinator. The Pilot IPM coordinator's responsibilities include 1) working with the IPM consultant to oversee the pilot, coordinating the people involved, and ensuring compliance with the IPM Policy; 2) learning as much as possible from the IPM consultant, the [EcoWise IPM Process](#), and your pest management service provider; 3) working to gain cooperation from the pilot facility occupants; and 4) publicizing the success of the Program.
4. Approach your Current Pest Management Service Provider about working on the IPM pilot.
Companies are generally capable of adapting to their customers' needs and desires. Explain your pilot project and give the company your IPM policy and the [EcoWise IPM Process](#) so they clearly understand what they are being asked to do. Explain that you have hired an IPM consultant, designated a Pilot IPM coordinator, and that the company will be working as part of this team on the new and exciting project.
5. Choose a Facility that Will Provide You with the Greatest Chance of Success.
Ask your current pest management service provider for advice and use the following criteria: 1) the building has no more than a few moderate pest problems; 2) resolution of the problems does not require a costly structural fix; 3) the building occupants and the maintenance staff are willing to cooperate, and ideally, are enthusiastic about the project.
6. Set up a Method to Track the Success of Your New IPM Program.
Don't burden your service provider or staff with unnecessary reporting, but the more of the following information you can collect, the better you'll be able to document success:
 - The types and quantities of pesticides used at the facility prior to, and then during, IPM implementation
 - The types of non-pesticide tools and products (e.g., insect monitoring devices, rodent traps, vacuum, caulk, doorsweeps, etc.) used before and during implementation
 - The number and types of occupant complaints before and during implementation
 - The cost of pest control for the facility before and after IPM implementation.Track building maintenance costs separately from pest control because if you have a great deal of deferred maintenance, those costs can distort your pest control figures.

F. Building Support for Your IPM Program

It is common to meet with resistance when making the changes necessary to implement a successful IPM Program. Some of those challenges are predictable.

Click here to read about how to address some of the barriers to adopting IPM in an article from the University of California Statewide IPM Project entitled "[Establishing Integrated Pest Management Policies and Programs: A Guide for Public Agencies](#)" by Mary Louise Flint, Sheila Daar, and Richard Molinar.

IV. THE IPM PROCESS

Pest management service providers have indicated that the more clearly you can explain the IPM Process required by your agency, the easier it is for the contractor to provide that service. The [*EcoWise IPM Process*](#) is a document that was developed expressly to help you understand how IPM should be conducted and to explain it to your staff and service providers. The document describes the IPM Process and provides guidance on how pesticides should be applied, if it becomes necessary to use them. Using the *EcoWise IPM Process* will increase uniformity among agencies and other IPM customers, encourage a higher degree of professionalism within the pest control community, and help you to have a successful IPM Program.

The [*EcoWise IPM Process*](#), derived from the *EcoWise Certified Standards for IPM Certification in Structural Pest Management* (see www.ecowisecertified.org), was written by professionals in the IPM field and reviewed extensively by public agency personnel, environmentalists, and by pest control professionals.

V. THE IPM ACTION PLAN

The IPM Action Plan is the plan of action to manage the pests at a particular site. The IPM service provider develops this Plan after a thorough inspection of the facility. The Plan is discussed with the IPM coordinator and the IPM coordinator must approve the Plan before it can be implemented.

The Government Services Administration IPM Program recommends that the following be included in an IPM Action Plan:

A. Proposed Materials and Equipment to be Used in the Service

This should include the brand names of pest detection equipment and monitoring devices, insect and rodent trapping devices and any other pest control devices or equipment that might be used. It should also include current labels and Material Safety Data Sheets for all pesticides that might be used and the brand names of pesticide application equipment and rodent bait stations.

B. Proposed Methods for Monitoring and Detection

The IPM service provider should describe the methods and procedures that will be used for identifying sites of pest harborage and access, and for making objective assessments of pest populations levels throughout the term of the contract.

C. Service Schedule for Each Building or Site

The IPM service provider should provide a complete service schedule that includes the frequency of the service provider's visits, the day(s) of the week the service provider will visit, and the approximate duration of each visit.

D. Description of any Structural or Operational Changes to Facilitate Pest Control

The IPM service provider should describe site-specific solutions for observed sources of pest food, water, harborage, and access.

The materials and equipment to be used should be consistent with an IPM approach and should include items such as mechanical devices for monitoring and capturing creatures, insecticides formulated as baits rather than sprays, and tools such as vacuums and steam cleaners.

The frequency of the service provider's visits should depend on the structure, its use, and the culture of the occupants. For example, a building with a cafeteria should be visited weekly because the presence of food increases the chances for pest invasions. A warehouse that stores equipment, but no food, might need only a monthly visit. A newer office building with occupants that are neat and rarely, if ever, eat at their desks might be visited every two weeks. Once the IPM technician is at the site, his or her work should be guided by the service requests that were logged in since the last visit and by the known sites of elevated risk such as food service areas, loading docks, locker rooms, etc.

The service provider should have an efficient method to relay information to you about structural and operation changes you should make. Forms should be easy to understand and handwriting should be legible. The information should be routinely sent to one designated person, ideally the IPM coordinator.

VI. CONTRACTING FOR IPM SERVICES

Contracting for IPM services is somewhat different from contracting for conventional pest control services. As we mentioned above, it is very important to hire a qualified IPM service provider. In the points that follow, we discuss issues to consider when securing IPM services for your agency. The scope of this document does not allow us to cover any of these issues in great depth. We recommend that you work with your procurement personnel and use this Tool Kit as a primer.

A. Soliciting Bids for IPM Services

Two methods are commonly used to solicit bids for services: 1) Invitation for Bid is used for routine services and requires agencies to accept the lowest cost bid, and 2) Request for Proposal or “RFP” (sometimes called Source Selection) is used for complex services in which professional expertise is needed and where different methods and approaches may be applied during the service.

Your agency may require that you use one or the other of these bid processes. Both methods have their drawbacks in contracting for IPM, and neither method provides a guarantee of quality IPM service.

Price should never be the sole, or even the first, consideration in choosing an IPM service provider. Instead, use the concept of the lowest bidder who meets your qualifications and can provide the services you need.

Problems You May Encounter

Because IPM requires special knowledge and experience, along with more work from the service provider in the beginning, you may encounter some problems securing bids for your contract, for example:

- Fewer responses than you have gotten in the past
- Resistance to the concept of IPM or your interpretation of it
- Responses from companies that are not as qualified or experienced as you would like

As with any service, you will encounter a continuum of understanding, skills, and experience. Companies with a rudimentary understanding of IPM may base their IPM service on replacing some of the pesticides they use in their conventional pest control services with “green” products. At the other end of the spectrum are companies that have years of experience with innovative approaches and are continually experimenting with new ideas and technology.

Requiring IPM certification, where it is available, will pre-qualify your bidders, and requiring that your service provider follow the [EcoWise IPM Process](#) will help standardize the meaning of IPM within the pest management profession and customers seeking IPM services.

1. **Invitation for Bid** (Sealed bid or low bid). Many of the best companies may decline to bid on this type of contract because they expect you to hire the lowest bidder regardless of qualifications. There are ways to increase your chances of success with this method, such as
 - specifying credentials and experience (e.g., EcoWise Certified structural IPM certification)
 - conducting a Request for Qualifications (RFQ), beforehand, that includes specific credentials (e.g., EcoWise Certified), qualifications, and experience, and requests information on how the company has approached similar projects. The

invitation for bid is then sent only to qualified companies. When bidders supply all their cost figures, you can select the most qualified, competitive bidder.

- having clear specifications for the work you want done and only accepting the lowest bidder that is *qualified and responsive*
- hiring an IPM consultant to develop IPM Action Plans for your sites and requesting bids for companies to carry out these specific Plans

For details on IPM service provider qualifications, see Section VII.

The U.S. General Services Administration's [Integrated Pest Management Program Contract Guide Specifications](#) was designed to be used with an invitation for bid process. Much of the language from this document has been incorporated into San Francisco Bay Area agency contracts.

2. **Request for Proposal or "RFP"** (Source Selection). This method allows a more detailed evaluation of the qualifications and responsiveness of prospective IPM service providers, but takes more time and effort. You must have a knowledgeable person with urban IPM experience to assist you in developing the RFP and to accurately evaluate proposals.

For details on what to include in an RFP, see Section VII.

B. The Type of IPM Contract

Do not hire a pest control company to provide service on an on-call basis. This is antithetical to IPM. The IPM service provider should be visiting your site regularly to inspect and monitor for pest problems, as well as deal with any complaints from building occupants

There are two basic types of contracts: "firm fixed price" and "time and materials". There are many variations of these two basic types, and we recommend that you use your agency's contracting specialists to give you specific guidance on your agency's requirements.

The following are some general concepts to keep in mind.

1. A "firm-fixed-price" contract typically works well for routine pest control where little variation in service is expected from building to building and the scope of work is well defined. This type of contract involves a minimum of administrative burden for both sides, and budgeting, as well as controlling costs, is simple. There may be a disincentive to spend time monitoring for pests and to perform more labor-intensive options for pest management such as steam cleaning. However, as you become more experienced at estimating the time involved in providing IPM services for your buildings, you will be better able to judge whether a bid is adequate to provide the monitoring service you need.
2. A "time and materials" contract provides an incentive to spend time monitoring and to use effective, labor-intensive treatment options; however, it may be difficult to budget for, and control, costs. A price cap can be used to alleviate this problem. A variation of the time and materials contract is using time and materials as a base to negotiate a fixed rate by building, after the contract has been awarded. This would make it easier to budget and also tailors IPM services to the appropriate level for each building.

C. The Cost of IPM Services

Agencies need to set realistic budgets for pest management. The number one reason for poor service is not paying enough for that service. The cost of your IPM service may initially be more expensive, especially if you have deferred building maintenance. According to the Boston Public Health Commission's [Integrated Pest Management: A Guide for Managers and Owners of Affordable Housing](#):

“It costs money up front to plan an IPM program, but initial studies show that over the long run IPM is typically very cost effective. In some cases it is no more expensive, or even less expensive, than traditional pest control approaches, especially when other costs such as reduced maintenance requests related to infestation are considered. Preliminary information from a pilot program in Boston public housing shows that while initial costs are somewhat higher, savings are achieved elsewhere and infestation levels have decreased.

“Sealing your buildings against pests has an important secondary benefit: it can reduce your energy expenditures and increase comfort levels inside the buildings. Simple measures such as weather stripping, caulking, and sealing holes and cracks can significantly reduce both indoor pest levels and temperature extremes.”

D. The Scope of Work for IPM Services

The scope of work should be as simple and realistic as possible. Avoid excessive reporting requirements. Require only data you will actually use. Do not include elaborate ways to micro-manage or approve IPM service provider treatment decisions; however, routine formulations for pesticides should be baits rather than sprayed liquids or aerosols. We recommend that you use the [EcoWise IPM Process](#) as part of your scope of work so that you can clearly communicate the kind of IPM service you want to your service provider. For more details on what to include in a scope of work, see Section VII.

E. Evaluating Your Pest Control Program and Measuring Success

When you are evaluating your pest control program, ask the following questions:

- Are pests, or evidence of pests, frequently encountered?
- Are there obvious conducive conditions for pests?
- Is insecticide being routinely sprayed indoors?
- Are there obvious indoor rodenticide placements?
- Is pest control service limited to pesticide application, with little or no inspection of potential trouble spots?
- Are many occupants dissatisfied with the pest control service?

If you can answer “no” to all of the questions above, your pest control program is successful and conforms to the intent of IPM.

For more detailed information, click here to view “[Evaluating Your Building’s Pest Control Program](#)” from the Government Services Administration’s Integrated Pest Management Program.

One way to measure pest management success is by a declining number of employee or tenant calls to the IPM liaison or IPM coordinator to report pest problems. Your service requests should be logged by location and type of pest in the logbook kept at each site. Note that it is possible you will reach such a low incidence of service requests (i.e., a high level of success) that it will be difficult to go beyond that low incidence without greatly increasing the cost and amount of work.

An adjunct to declining service requests is declining pesticide use. You will not only want to see a decline in the amount of pesticide used, but also a shift from sprayed insecticides to insecticides deployed as baits. In California, pesticide use information will come from the monthly reports required by State law. Ask your IPM service provider to give you copies of those reports and to add location of use to each report.

VII. HOW TO DEVELOP A REQUEST FOR PROPOSAL (RFP) FOR IPM SERVICES

In this section of the Tool Kit, we will describe in detail how to structure a request for proposal (RFP) for IPM services. Some information discussed earlier in this document is repeated for the convenience of the reader.

If your agency is required to issue an invitation for bid rather than an RFP, review the information above under Section IV. A. *The IPM Bid Process*. You will find that much of the information below can also be helpful to you, especially if you decide to issue a request for qualifications (RFQ) before your invitation for bid.

The Web page, [Local Government RFPs](#), has links to recent RFPs and contract documents used by the City of Palo Alto, the City and County of San Francisco, Union Sanitary District (in Fremont, CA), and from the Integrated Pest Management Program Contract Guide Specification for the U.S. Government Services Administration (GSA).

NOTE: The items below are not meant to be a comprehensive listing of all the information necessary for an RFP or contract. Rather, it is information we recommend that you add to your current standard RFP or contract format, or use to modify your existing language, in order to help you procure IPM services. Your current pest management contract will also cover responsibility and liability in a depth that is not covered here. The sample language is for guidance only and if used, should be adapted to meet your specific needs and requirements. Please consult with your contracting staff.

A. Defining the IPM Services You are Requesting

1. The Invitation

In your invitation, include the fact that you are seeking integrated pest management (IPM) services for your facilities.

Sample language from the City of Palo Alto:

The City of Palo Alto seeks experienced Integrated Pest Management (IPM) pest control services for City facilities. The City's IPM policy strives to promote IPM strategies to improve water quality in local creeks and the Bay, and independent of the policy, staff wishes to minimize health hazards to people from pesticide exposure.

2. The IPM Definition

Provide a definition to make sure everyone understands what you mean by IPM.

Example IPM Definition from EcoWise Certified:

IPM is a science-based strategy and decision-making process that provides effective, long-term pest control while emphasizing pest prevention and the use of non-chemical pest management practices. At its core, IPM includes the following activities:

- Inspection, monitoring and record-keeping are used to determine if thresholds for acceptable pest levels have been exceeded and to select the location, timing, and type of management strategies needed to successfully manage pests.*
- A partnership is formed with the customer to facilitate management of pests.*
- Appropriate and site-specific treatments are selected from educational, cultural, manual, mechanical, physical, biological, and chemical strategies. They are used within an integrated program to achieve long-term solutions that minimize hazards to human health and the environment.*
- Reduced-risk chemical controls are included in the treatment program when non-chemical methods are insufficient to solve the pest problem in an effective and affordable manner.*

3. **General Requirements**

The following language from the GSA has been used by many public agencies:

The [IPM service provider] shall furnish all supervision, labor, materials, and equipment necessary to accomplish the monitoring, trapping, pesticide application, and pest removal components of the IPM Program. The [IPM service provider] shall also provide detailed, site-specific recommendations for structural and procedural modifications to aid in pest prevention.

4. **The IPM Process**

Use the [EcoWise IPM Process](#) to make contracting easier.

Providing a written IPM Process clarifies the kind of service you want and gives assurance to service providers that everyone will be bidding on the same scope of work, thus increasing interest in your RFP.

5. **Requirements to Educate Staff**

Some public agencies have included a requirement for their IPM service providers to formally train agency staff on pest prevention. Understand that in general, it is more efficient and effective for the service provider to talk informally to the few individuals involved in or affected by a pest problem. People who are actually dealing with a pest issue are the most open and receptive to information about pest management that might otherwise seem boring. Delivering information when it is needed will increase the chances that agency staff will actually understand, act on, and remember the information.

Communication with and education of agency staff is already part of the [EcoWise IPM Process](#), so if you require your service provider to follow the [EcoWise IPM Process](#), it should not be necessary to call out staff education separately in the contract. If you have additional specific training needs, describe them.

If you encounter a situation where an entire building or floor is involved in a pest issue, you may want to hire your IPM service provider to prepare and give the staff involved a short talk on the causes of the pest problem and the varying responsibilities of the service provider, agency staff, and agency administration in solving the problem. This service should be contracted for separately because it is outside the normal service and will take time to prepare and present such a talk.

6. **Emergency Services**

There may be times when you need your IPM service provider to respond quickly to a pest problem. Your agency may already have emergency service language that you can adapt to your IPM Program.

Sample language from the GSA:

On occasion, the [Agency] may request that the [IPM service provider] perform corrective, special, or emergency service(s) that are beyond routine service requests. The [IPM service provider] shall respond to these exceptional circumstances and complete the necessary work within three (3) hours after receipt of the request.

B. Necessary Qualifications for an IPM Service Provider

1. Independent, Third-party IPM Certification is Highly Recommended

IPM is a knowledge-based process for managing pests; therefore, it is important to hire an experienced IPM service provider with qualified personnel for your IPM Program. If a reputable, independent, third-party IPM certification is available in your area, require that service providers who answer your RFP be certified, or favor certified companies

who respond by giving them extra points in your rating system. Requiring IPM certification will make your job of screening applicants easier.

As mentioned before, the following are examples of independent, third-party IPM certification programs: www.EcoWiseCertified.org and www.greenshieldcertified.org.

To give you a better idea of the kinds of basic requirements necessary for consideration for IPM certification, the EcoWise Certified qualifications for companies and practitioners are listed below as an example:

Qualifications from the EcoWise Certified Program

- Companies must be licensed for Branch 2 work by the California Structural Pest Control Board (Branch 2 includes “general pests” which are household pests such as ants, cockroaches, rats, and mice. Branch 2 work does not include termites, mosquitoes, fumigation, or landscape pests).
- Companies must be registered with the County Agricultural Commissioner in the county in which the company proposes to work.
- Companies must be in good standing with each County Agricultural Commissioner in the counties in which the company is registered.
- The individuals in an EcoWise Certified company who will be performing an EcoWise Certified IPM service, or overseeing the service, are called EcoWise Certified IPM Practitioners and must:
 - (a) be licensed at the level of “Field Representative” or “Operator” in Branch 2 for at least two (2) years (both these levels of licensees are allowed to perform inspections, identify pests, and apply pesticides; the other level of licensee, “applicator” is only allowed to apply pesticides)
 - (b) demonstrate knowledge of IPM by one of the following:
 - pass, with a grade of at least 70%, a written exam prepared by EcoWise Certified and designed to evaluate technical knowledge of IPM
 - satisfactorily complete Purdue University’s “Intermediate-Level Industrial and Urban IPM” or other similar approved course
 - hold certification as a Board Certified Entomologist or an Associate Certified Entomologist from the Entomological Society of America
 - hold a Bachelor of Science, Master of Science, OR Doctoral degree in pest management, applied entomology, urban entomology, or other similar course of study from an accredited college or university
 - (c) complete 15 approved continuing IPM education hours every 3 years
- On the job, the EcoWise Certified IPM Practitioner must
 - (a) conduct the initial site assessment and provide the customer with the IPM Action Plan for how to manage pests that were found
 - (b) implement the IPM Action Plan or directly supervise its implementation

Simplifying the Transition to an IPM Service by Requiring Certification

Requiring that bidders possess EcoWise Certification or its equivalent (or obtain such a certification within 12 months of winning the contract) will ensure a pool of more highly qualified bidders who are interested in doing IPM.

Click here to see details on [options for including an IPM certification requirement](#) in your RFP.

Sample language from the City of Palo Alto:

The contractor:

- will be certified by EcoWise Certified, a project of the Association of Bay Area Governments (see www.ecowisecertified.org), within 12 months from starting services. **If certification is not completed within 12 months of contract start date, the contract may be terminated at the City's discretion.** Preference will be given to contractors who are already EcoWise Certified at the time of application. All service provided by EcoWise Certified companies will be congruent with EcoWise certification service standards. Where conflicting, provisions in this contract supersede EcoWise standards.
- will ensure that any contractor employee that provides service to the City of Palo Alto must be an EcoWise Certified IPM Practitioner or accompanied by an EcoWise Certified IPM Practitioner if in training

What to Do if You Do Not Have Access to Certified IPM Service Providers

You may be unable to contract with an IPM-certified company or you may have a non-certified company you would like to work with. If either of these is the case, we recommend that you require your service provider to follow the [EcoWise IPM Process](#).

2. Experience to Require of Your Service Provider

You will probably want to require at least the following kinds of experience.

For **companies** responding to your RFP:

- a. Five (5) years experience with industrial, commercial, or institutional accounts
- b. A two (2) year verifiable record of practicing IPM

For **each individual** who will be working on your contract:

- a. Five (5) years experience with industrial, commercial, or institutional accounts
- b. A two (2) year verifiable record of practicing IPM

Note: It is important that you know which of the IPM service provider's personnel will be working on your contract, that you understand the qualifications of those personnel, and that the service provider alert you to any changes in personnel.

3. Training to Require of Your Service Provider

Ideally, you want your service provider to be highly trained in IPM, but there are problems in requiring a specific level of IPM training, for example:

- a. There is a lack of availability of quality IPM training. This may change in the near future if the California Structural Pest Control Board (SPCB) mandates a certain amount of IPM training to obtain and maintain licenses. The SPCB does have continuing education requirements for all licensees in general pest control and pesticide safety.
- b. It will be very difficult for you (or even your IPM coordinator) to evaluate the kind of training your IPM service provider's employees have received because there are no standards for using "IPM" in the title of an SPCB-approved class, and there are no standards for what constitutes an "IPM" class. EcoWise Certified requires 15 IPM continuing education hours every three years that are approved by the EcoWise Certified Program Manager.
- c. Requiring a certain level of classroom IPM training may favor large companies with ample resources to provide in-house training to their employees. But again, you cannot easily and quickly evaluate the content and quality of those classes.

It could be useful to ask prospective IPM service providers what kind of employee training they require that is over and above the requirements of the SPCB. You might also ask how the company imparts IPM knowledge to their staff.

4. **Verifying Pest Control License History**

When you have narrowed your field of prospective IPM service providers, you can call the California Structural Pest Control Board Enforcement/Complaints division at 916-561-8708 for a history of disciplinary actions involving a particular company and the number of complaints (if any) lodged against the company in the last couple years.

C. Documents to Require in Your RFP

1. **References**

Require references from facilities that are similar to your own.

2. **The Company's Record-keeping and Monitoring Forms**

Requesting samples of these forms may help you to understand more about how the company conducts its business.

D. Pests Included in, and Excluded from, the Contract

You will want to list the categories of pests that are covered and not covered by your contract. Because this is an RFP for structural IPM, the contract should cover pests that are regulated by the California Structural Pest Control Board under Branch 2. As explained above in Qualifications, Branch 2 includes "general pests", which are household pests such as ants, cockroaches, rats, and mice. Branch 2 also includes stinging insects that nest in, on, or near the structure. Branch 2 work does not include termites and other wood destroying organisms, mosquitoes, fumigation, or landscape pests.

1. **Included Pests**

You can simply say that the pests covered by the contract are those regulated by the Structural Pest Control Board under Branch 2.

2. **Excluded Pests**

We recommend that you contract separately for control of mosquitoes, termites and other wood destroying organisms, birds, and vertebrates other than rats and mice. Special skills and knowledge, and sometimes, special licenses, are needed to manage mosquitoes, termites, birds, and nuisance vertebrates. Although bed bugs are covered under Branch 2, they also require special knowledge as well as repeated treatments. If you experience problems with any of these creatures, we recommend that you contract with companies that are experienced in controlling these pests.

E. The Scope of Work to Include in Your RFP

1. **Require Your IPM Service Provider to Follow the *EcoWise IPM Process*, or demonstrate that they follow an equally rigorous process**

The *EcoWise IPM Process* was extracted from the *EcoWise Certified Standards for IPM Certification in Structural Pest Management* for the purpose of helping agencies define the kind of IPM service they want. We recommend that in your scope of work, you require that your service provider follow the [EcoWise IPM Process](#).

2. **Include your IPM Policy**

If your agency has an IPM policy or must operate under one, include the policy in the scope of work.

3. **List IPM Compatible Pesticides**

The *EcoWise Certified IPM Process* includes a list of examples of pesticides that are compatible with an IPM Program. This list was derived from lists used by other Bay

Area agencies in their IPM Programs. If your agency identifies active ingredients in pesticides that cannot be used on agency property and any of them appears on the EcoWise Certified list, remove those active ingredients to create your agency's own list of pesticides that are compatible with your IPM Program. Include this list in your RFP and contract.

Visit www.EcoWiseCertified.org and <http://www.sfenvironment.org/downloads/library/nticiderrplssortedbyproduct.pdf> (San Francisco Department of the Environment) for examples of pesticide lists.

4. **Describe the Required Content for an IPM Action Plan**

The *EcoWise IPM Process* requires a written IPM Action Plan but does not specify a format for the Plan. The "Pest Control Plan" used by the GSA provides a simple yet comprehensive format for an IPM Action Plan:

- **Proposed Materials and Equipment to be Used in the Service**
This should include the brand names of pest detection equipment and monitoring devices, insect and rodent trapping devices and any other pest control devices or equipment that might be used. It should also include current labels and Material Safety Data Sheets for all pesticides that might be used and the brand names of pesticide application equipment and rodent bait stations.
- **Proposed Methods for Monitoring and Detection**
The IPM service provider should describe the methods and procedures that will be used for identifying sites of pest harborage and access, and for making objective assessments of pest populations levels throughout the term of the contract.
- **Service Schedule for Each Building or Site**
The IPM service provider should give you a complete service schedule that includes the frequency of the service provider's visits, the day(s) of the week the service provider will visit, and the approximate duration of each visit.
- **Description of Any Structural or Operational Changes to Facilitate Pest Control**
The IPM service provider should describe site-specific solutions for observed sources of pest food, water, harborage, and access.

The materials and equipment to be used should be consistent with an IPM approach and should include items such as mechanical devices for monitoring and capturing creatures, insecticides formulated as baits rather than sprays, and tools such as vacuums and steam cleaners.

The frequency of the service provider's visits should depend on the structure, its use, and the culture of the occupants. For example, a building with a cafeteria should be visited weekly because the presence of food increases the chances for pest invasions. A warehouse that stores equipment, but no food, might need only a monthly visit. A newer office building with occupants that are neat and rarely, if ever, eat at their desks might be visited every two weeks.

Once the IPM technician is at the site, his or her work should be guided by the service requests that were logged in since the last visit and by the known sites of elevated risk such as food service areas, loading docks, locker rooms, etc.

The service provider should have an efficient method to relay information to you about structural and operation changes you should make. Forms should be easy to

understand and handwriting should be legible. The information should be routinely sent to one designated person, ideally the IPM coordinator.

5. Indicate Responsibility for Approving and Carrying out the IPM Action Plan

The IPM service provider should develop an IPM Action Plan based on initial site visits to your facilities. The IPM Coordinator should approve the IPM Action Plan.

Sample language from the GSA:

The [IPM Service Provider] shall submit to the [IPM Coordinator] [an IPM Action Plan] at least five (5) working days prior to the starting date of the contract. Upon receipt of the [IPM Action Plan], the [IPM Coordinator] will render a decision regarding its acceptability within two (2) working days. If aspects of the [IPM Action Plan] are incomplete or disapproved, the [IPM Service Provider] shall have two (2) working days to submit revisions. The [IPM Service Provider] shall be on-site to perform the initial service visit for each building within the first five (5) working days of the contract.”

The [IPM Service Provider] shall be responsible for carrying out work according to the approved [IPM Action Plan]. The [IPM Service Provider] shall receive the concurrence of the [IPM Coordinator] prior to implementing any subsequent changes to the approved [IPM Action Plan], including additional or replacement pesticides and on-site personnel.

Note: The person responsible for approving the IPM Action Plan (i.e. the IPM coordinator) must be someone with knowledge of structural pest control and experience in urban IPM. Staff without this kind of expertise will be incapable of evaluating the quality of the IPM Action Plan.

6. Require a Pest Control Logbook or File at Each Building or Site

It is important to have a record of the pest management activities at each building or site. The IPM liaison should collect and record reports of pest problems in a logbook, but the IPM service provider should be responsible for making sure that when pest problems are reported, they are recorded in the logbook. The IPM service provider should then record all work that was performed to resolve the problem. The service provider should also record all routine pest management activities carried out at the site during each visit.

Click here for an example of a [logbook page](#).

7. Describe Reporting Requirements

The IPM service provider should supply you with current labels and Material Safety Data Sheets (MSDS) for each pesticide they plan to use at your facilities and should regularly provide you with pesticide use records for your facilities.

8. Describe Any Special Record-keeping and Reporting Requirements

If you have special requirements, such as a particular kind of electronic reporting, be sure to include it in the scope of work.

Example from the City of Palo Alto:

The contractor must provide monthly pesticide reporting information in electronic format using the City’s Contractor Pesticide Application Form located at http://www.cityofpaloalto.org/publicworks/documents/ContractorPesticideApplicationForm_000.xls to be emailed to the City’s IPM Coordinator by the 15th of each month for the previous month’s work. The contractor must also have Internet access and the ability to enter pesticide use information on-line if the City provides that reporting mechanism.

Note: It is very important to require only data and reports that you will actually use. Many times, IPM Programs require an IPM service provider to provide large quantities of information that is never examined or analyzed. This becomes a source of frustration and wasted time and money for both parties.

9. Describe Notification and Posting Requirements

If your agency has specific posting requirements when pesticides are used, include those in the RFP and contract.

Example from the City of Palo Alto:

Prior to application, the contractor must notify manager or supervisors overseeing the employees in the working areas that are to be treated with any pest control product other than containerized baits.

Example from the California Healthy Schools Act:

- *Warning signs must be posted 24 hours before a pesticide application and kept up for 72 hours afterward.*
- *Signs must prominently display the words, "Warning – pesticide-treated area," and must include the product name, manufacturer's name, the U.S. EPA's product registration number, scheduled date and areas of application, and reason for the application (that is, the target pest). The law does not specify text, color, or size of lettering, but the sign must be visible to anyone entering a treated area.*

The word "Warning" on the sign does not refer to the pesticide toxicity signal words (danger, warning, caution), but is universal language for "Watch out!" You can download sample warning signs in English and Spanish from California's Department of Pesticide Regulation's school IPM site. Go to www.schoolipm.info and click on "Tools & Templates" in the column on the left, then click on "Pesticide Sample Application Warning Sign."

F. Compensation

In this section of the RFP, explain how the IPM service provider will be compensated.

Sample language:

Reimbursement for services covered in this solicitation shall be based on a firm fixed price cost negotiated after contract award. All services will be paid for on an hourly basis with other direct costs to be billed on an as expended basis up to the contract cost ceiling. [The IPM service provider] is responsible for payment of applicable state and federal taxes. Special or emergency services will be negotiated on an as-needed basis and included in the fixed price cost up to the ceiling.

G. Length of Contract

We recommend at least a 3-year contract. It will take time for your IPM service provider to become familiar with your facilities and system and to help you make the transition to an IPM Program from a conventional pest control program.

Sample language:

The term of this contract could extend up to three years depending on performance and available funding.

H. Submittal Requirements

Provide a checklist of the materials you are requiring the applicant to submit. Your checklist should include items that are specific to your RFP.

Example from Union Sanitary District:

SUBMITTAL CHECKLIST

This checklist serves as a reminder for each item and activity cited in Union Sanitary District's Request for Contractor Qualifications required of licensed Pest Control Operators seeking the Districts pest control contract.

Applicants must complete each of the following requirements to be considered for the District's pest control contract:

1. *Create and submit the following sample documents*
 - A. *A sample monitoring form for ants (S-6)*
 - B. *A sample "service report form" (S-12)*
2. *Submit the following licenses and certificates*
 - A. *Contractor's Branch 2 (general pest) license issued by the State of California Structural Pest Control Board (Section Q-1);*
 - B. *Contractor's valid business license (Section Q-1);*
 - C. *A statement from the Structural Pest Control Board certifying that any and all violations documented in the last 5 years have been addressed to the satisfaction of State Regulators (Section Q-1);*
 - D. *Proof Contractor has worked in the professional pest control business handling industrial, commercial, and institutional accounts for at least three (3) years immediately preceding the submission of this RFQ (Section Q-2);*
 - E. *A list of at least three (3) references (including names and telephone numbers) for work comparable to that discussed in these specifications, which has been completed during the last three (3) years or is currently in progress (all work references shall specifically reflect IPM methods-Section Q-2);*
3. *Provide licenses for the site supervisor and all technicians to show that they meet the requirements spelled out in Section Q-3 of the RFQ.*
4. *Provide photograph or other proof of company uniform and vehicle properly displaying name of company (Section Q-4).*
5. *Provide a description of the company's in-house IPM training program (or equivalent) for technicians and other relevant personnel. If appropriate, list other IPM-relevant sources of training of hands-on IPM experience offered to company personnel in the prior 2 years (Section Q-5).*
6. *Describe the company Health and Safety program for employees (Q-5).*
7. *Describe the Contractor's plan for meeting the record keeping requirements set forth in Section S-12.*

I. Evaluation and Selection Criteria

Provide a list of the criteria you will use for evaluating applicants and the points associated with those criteria.

Click here to see evaluation criteria from the [GSA, San Francisco](#).

VIII. IPM Resources

Bio-Integral Resource Center (BIRC): www.birc.org

BIRC is a non-profit educational organization specializing in the latest research in the field of IPM. BIRC has numerous publications for sale and publishes to journals, *The IPM Practitioner* for IPM professionals, and *Common Sense Pest Control Quarterly* for the lay public.

[Boston Public Health Commission: Integrated Pest Management: A Guide for Managers and Owners of Affordable Housing](#)

Although this was written for affordable housing, it is an excellent guide for anyone who is setting up a structural IPM program and hiring an IPM service provider.

EcoWise Certified Structural IPM Certification Program: www.EcoWiseCertified.org

This website contains a list of the service providers who are EcoWise Certified, downloadable files of the EcoWise Certified Standards and useful IPM service forms, and an extensive list of annotated resources.

Green Shield Certified: www.greenshieldcertified.org

This website contains information about the Green Shield IPM Certification program and lists certified IPM providers.

[Massachusetts Department of Food and Agriculture: Integrated Pest Management Kit for Building Managers](#)

The most useful parts of this document are the IPM Guidance Sheets for Building Management Staff. These fact sheets are written for staff in charge of a variety of functions within a building such as recycling and waste management, electrical, plumbing, food service, HVAC, and a number of others. The fact sheets introduce the concept of IPM and highlight pest issues related to each building function.

Sacramento Stormwater Quality Partnership's IPM Tool Kit for Municipal Operations:

www.sacramentostormwater.org/SSQP/pesticides/ipm-toolkit.asp

This is an extensive list of links to documents and websites that can help you in implementing an IPM program and contracting for IPM services.

San Francisco's Department of the Environment: www.sfenvironment.org/

Under the Toxics Reduction Program, you will find information about pest management including the San Francisco Approved Reduced Risk Pesticide List, pest management alternatives, and information on the hazards of pesticides.

U.C. IPM Online: www.ipm.ucdavis.edu/

This website from the University of California Statewide IPM Project provides a wealth of information about solving pest management problems. It also includes the list of UC ANR publications on pest management.

U.S. General Services Administration IPM Program: www.gsa.gov/ipm

The IPM Document Library contains four downloadable documents on structural IPM. We have referred to two of these documents in our text.

SOURCES FOR RECOMMENDATIONS IN THIS DOCUMENT

The recommendations in this document are based on information from the Bio-Integral Resource Center in Berkeley, CA; Dr. Albert Greene, Regional Entomologist, National Pest Management Coordinator, Service Delivery Support Division (WPY), U. S. General Services Administration; discussions at several meetings of San Francisco Bay Area Public Agencies IPM Exchange and IPM Contracting workgroup (including representatives from Bay Area and Sacramento area city and county governments, Pest Control Operators of California, the Bio-Integral Resource Center, and the Urban Pollution Prevention Project); from review of existing local agency requests for proposal and contracts (including Santa Clara County, City of Palo Alto, San Francisco Department of Environment, Union Sanitary District, and others); California's Healthy Schools Act of 2000; and on Standards prepared by the EcoWise Certified Program.