The K-12 Cleaning Vendor Switching Playbook

A practical timeline + sequence guide for school business managers ready to change cleaning vendors.

Published by Advanced Building Care. Free to download, free to share. If you're switching cleaning vendors at a Utah K-12 school or charter network, this is the playbook we wish every business manager had before we worked together.

Why this playbook exists

If you've decided your current cleaning vendor isn't working, the question stops being *"should we switch?"* and starts being *"how do we switch without making it worse?"*

Most school business managers we work with had been thinking about switching for 6–18 months before they actually pulled the trigger. The delay isn't because they liked their incumbent. It's because switching is hard:

- The new vendor has to actually be better, not just promise to be
- The transition can't disrupt instruction, after-school activities, or inspections
- You need budget approval, board buy-in, and clear documentation of why
- The current vendor might react badly to losing the account
- You don't want to be the person who picked the wrong replacement

This playbook lays out the timeline and sequence that minimizes those risks. It's written for K-12 specifically — charter schools, private schools, and small public school districts — because the calendar pressures and budget rhythms of K-12 are unique. The advice generalizes, but the framing assumes you operate on a July–June fiscal year and your facility is empty enough in summer to make a clean break possible.

You can use this playbook regardless of whether you eventually pick Advanced Building Care or any other vendor. We're handing you the tool because we're confident the process below leads to better vendor relationships across the category.

The 6-month timeline at a glance

When	Phase	Owner	Output
6 months before contract change	Decide + document	You	Internal decision memo
5 months before	Define what you need	You	RFP draft + scorecard
4 months before	Vendor outreach	You	Shortlist of 3–5 vendors
3 months before	Vendor responses + walkthroughs	You + vendors	Scored proposals
2 months before	Decision + contract negotiation	You + chosen vendor	Signed contract
1 month before	Transition planning	You + new vendor	Onboarding plan
Day of switchover	Cutover	New vendor	Live cleaning starts

If your fiscal year starts July 1, that means **starting the process in January** for a clean July 1 vendor change. Most school business managers we talk to start in April or May, which is too late — they end up with rushed vendor evaluations, no walkthrough time, and onboarding that bleeds into the first week of school.

The playbook below walks through each phase in detail.

Phase 1: Decide + document (6 months out)

Goal: lock down internally that you're switching, and document *why*, in writing.

The "why" matters more than you'd think. When the board asks, when your head of school asks, when next year's incoming business manager wonders, the documented reasoning is what holds up.

Write a 1-page decision memo

A simple internal doc with three sections:

1. What's broken with the current vendor (specific incidents, dated)

Don't write generalities like "they're unreliable." Write specific dated examples:

- *"October 14, 2024: West campus restrooms not cleaned overnight. Discovered at 7:15am by maintenance staff. No communication from vendor; we had to call. Their response: 'crew called out sick, we didn't have backup.'"*
- *"December 3, 2024: Strip-and-wax floor work scheduled for winter break was not completed; vendor said they 'ran out of time.' We had to pay a second vendor for the work in January."*
- *"Q1 2025 invoices: 3 of 6 monthly invoices had errors requiring correction."*

If you have an incident log already, pull from it. If you don't have one, this is the time to start.

2. What you tried to fix it

Document any conversations with the current vendor about performance. Did you give them a written warning? A verbal one? Did they respond? Did anything improve? This protects you legally and politically.

3. Your decision and the new criteria

State the decision plainly: *"We are issuing an RFP for a new cleaning vendor effective July 1."*

Then list the 5–7 specific things the new vendor must do better. Examples:

- *Same-day response to any missed-clean or quality issue*
- *A named primary contact reachable by direct line, not a 1-800 number*
- *Monthly account review with documented quality scoring*
- *Backup staffing — must not depend on a 3-person crew*
- *Specific K-12 experience: at least one other multi-campus school account*

These criteria become the foundation of the RFP and the vendor scorecard in the next phase.

Get budget approval (in parallel)

If the new vendor's pricing might land higher than your current contract, get that approved BEFORE you go to RFP. The worst outcome is running a full RFP process, picking a vendor, and then losing the budget fight. Approve a budget RANGE based on your current spend + 10–20%; specific pricing comes later.

Don't tell your current vendor yet

You'll give them notice eventually — but not now. The next 5 months you may need them to keep delivering normally. If they know they're losing the account, performance often gets WORSE in the final months, not better. Hold notice until 30–60 days before changeover.

Phase 2: Define what you need (5 months out)

Goal: write down exactly what good looks like, so vendors respond against the same standard.

This is where the RFP Best Practices Guide (separate document, also available from Advanced Building Care) comes in. The short version of that guide:

Your RFP should cover 5 sections

1. **Facility profile** — campus count, sqft per building, special spaces (gym, cafeteria, science labs, art rooms, music halls), operating hours, after-school activity calendar, student + staff count
2. **Scope of work** — what gets cleaned, how often, including specialty work (carpet extraction, floor strip-and-wax, gym floor recoats, window cleaning, electrostatic disinfection)
3. **Performance expectations** — response times, named contact requirement, quality program, substitution protocols when a crew member is out
4. **Qualifications required** — insurance minimums, bonding, K-12 experience, references, background-check policy for staff
5. **Pricing format + contract terms** — how vendors should structure pricing (per sqft per month, fixed monthly fee, or hybrid), specialty work priced separately, contract length, out clauses

Your vendor scorecard

Score each vendor's response on 10 criteria, 1–5 each, total out of 50:

1. Reliability evidence (track record, references at similar schools)
2. Accountability structure (named contact, escalation path)
3. Communication discipline (response time, account review cadence)
4. K-12 experience (years, accounts, specific protocols)
5. Multi-campus capability (can they staff 2–4 sites without dependency on a single crew?)
6. Insurance and bonding (above your minimums? documentation provided?)
7. Pricing transparency (specific numbers? line items? or "call for quote"?)
8. References (3+ verifiable, ideally similar schools)
9. Response time (quote turnaround, day-1 issue response promise)
10. Contract terms (no long-term lock-in, scope clarity, out clauses)

Anything scoring below 35/50 should not be on your shortlist. Below 30/50, don't even consider.

Aim for 3–5 vendor responses

Fewer than 3 = no comparison. More than 5 = you'll be drowning in walkthroughs you don't have time for. The sweet spot is 4 — enough variation to compare, not so many that the evaluation phase eats your spring.

Phase 3: Vendor outreach (4 months out)

Goal: identify 3–5 vendors capable of meeting your criteria, and get them the RFP.

Where to find vendors

1. **Other school business managers in your network** — ask charter network operators, head-of-school colleagues, district facilities directors. The strongest signal is a multi-campus school account that has been with a vendor 3+ years.
2. **Trade associations** — BOMA Utah, Utah Charter Network, Utah Association of Independent Schools
3. **Google search for specific terms** — *"charter school cleaning [your state]"*, *"K-12 cleaning [your metro area]"*, *"school janitorial services [your state]"*. Look for vendors whose websites describe school-specific protocols (dismissal-aware scheduling, restroom mid-day touch-ups, color-coded microfiber, summer floor work). If their website doesn't show school depth, their delivery probably doesn't either.
4. **Your current vendor's competitors** — if you know which vendors lost the bid when you originally chose your current one, they're a natural shortlist.

Avoid:

- National franchises with no local presence (the franchise badge doesn't help if the local operator is 3 people)
- Residential cleaning companies trying to expand into commercial
- Vendors that don't have references from similar account types

Send the RFP

Email each shortlist vendor a copy of your RFP. Give them 3 weeks to respond.

Set the walkthrough window

In the RFP, specify a 2-week window in which you'll do vendor walkthroughs at your campus. Walkthroughs are non-negotiable — any vendor that quotes without seeing the building is quoting wrong.

Phase 4: Vendor responses + walkthroughs (3 months out)

Goal: evaluate vendor responses against your scorecard, and conduct walkthroughs at each campus.

What a good response looks like

A well-prepared vendor's RFP response will be 10–20 pages and include:

- A short cover letter naming the primary contact
- A scope-of-work response that mirrors YOUR scope, with any additions or substitutions clearly called out
- Pricing in the format you requested (probably per-sqft per-month for the recurring contract, with specialty work as line items)
- 3 references, including at least one similar school account
- Insurance certificate copies (or a statement that they're available on request)
- Quality program description — how they measure their own performance
- A proposed transition / onboarding plan if they win

Walkthrough best practices

- Walk every campus the vendor will service. Not just the flagship — all of them.
- Bring the vendor's NAMED PRIMARY CONTACT (the person who will run your account), not just a sales person
- Show them the spaces they'll actually clean — including the rough ones (restrooms, gym floors, kitchen)
- Show them the spaces they'll need to coordinate around (after-school programs, athletic events, performances)
- Take notes during the walkthrough about how the vendor responds to questions — do they ask the right questions back? Do they recognize challenges? Or do they just nod?

A vendor who spots problems during the walkthrough and proposes solutions is showing you what your account experience will be like.

Score and shortlist

Use the 10-criteria scorecard. Rank vendors. Anyone below 35/50 is out. Of the rest, pick the top 2 for reference calls.

Phase 5: Decision + contract negotiation (2 months out)

Goal: reference-check your top choices, then negotiate and sign a contract.

Reference calls

Call 3 references for each of your top 2 vendors. Don't email — call. People are honest on the phone, cautious in writing. Questions to ask:

1. *How long have you used [vendor]?*
2. *What were they replacing? Why did you switch?*
3. *What's been better than expected, and what's been worse?*
4. *How do they handle problems when they come up?*
5. *Would you renew with them when your current contract ends? Why or why not?*
6. *Is there anything you wish you'd asked them BEFORE you signed?*

If you get a reference who is just polite — "yeah they're fine" — that's a signal too. The strongest references talk in specifics: dates, incidents, names.

Pick the winner

Combine the scorecard with the reference data. Score the references separately on a 1–5 scale (1 = lukewarm, 5 = "they'd recommend without hesitation"). If both scorecards point to the same vendor, you have your choice.

If they don't agree, the references usually carry more weight than the proposal. A great proposal can be sales-engineered; references are harder to fake.

Contract negotiation

Things to negotiate before signing:

- **Out clause** — typically 30 days notice from either side. You want this for protection; ABC and most quality vendors offer it as standard.
- **Pricing escalation** — annual increase capped at a specific percentage (3–4% typical) or tied to a published index
- **Specialty service line items** — should be priced separately, not bundled into a base rate that you can't audit
- **Insurance certificates** — naming your school as additional insured
- **Transition period** — most quality vendors propose a 2–4 week ramp where they overlap with the outgoing vendor (or run shadow shifts). Ask for this if it's not proposed.
- **First 90 days review** — schedule a formal review meeting at day 30, 60, 90 to catch any issues early

Don't sign until these are in writing.

Phase 6: Transition planning (1 month out)

Goal: plan the handoff so the first night of the new contract is seamless.

Give notice to the current vendor

30 days notice is standard. Send it in writing, dated, with a copy retained.

When you give notice, the current vendor will react in one of three ways:

- **Professional**: they thank you, ask if there's anything they can address, and continue to deliver. Most do this.
- **Negotiate**: they may offer concessions to keep the account. Decline politely — you've already done the evaluation work.
- **Disengage**: a few vendors let performance slip in the final 30 days. Be prepared for this; document anything that goes wrong.

Coordinate the cutover

Work with the new vendor on:

- **Key handoff and building access**: codes, keys, alarm protocols, building security contact
- **Existing supply inventory** — does the new vendor inherit it, or does the outgoing vendor remove it?
- **Day-of-cutover schedule** — first night of cleaning under new contract
- **Day-1 emergency contact** — who do you call if something is wrong on the first morning?
- **Existing concerns documentation** — give the new vendor your incident log and any documented issues with the previous setup, so they don't repeat them

Internal communication

Tell the staff who needs to know:

- Head of school / executive director
- Maintenance / operations staff
- Front office (they handle the morning building-state)
- After-hours staff if you have any

Don't announce to the broader staff or community. A vendor change is operational, not strategic.

Phase 7: Day-of-cutover and beyond

Goal: the first morning under the new contract should feel like nothing changed — except better.

Walk the building the morning of Day 1

Check the building yourself or have a trusted staff member do it. Note anything that's not right and report it to the new vendor's named primary contact within the first business hour.

Day-30 review

30 days in, sit down with the new vendor's account manager. Cover:

- What's working
- What's not working
- Any complaints from staff, parents, students
- Any recurring issues

- Adjustments needed to scope or schedule

A vendor that asks for this meeting themselves (vs. you having to schedule it) is showing you what the long-term relationship will be like.

Day-90 review

Same pattern. By 90 days, the new vendor should feel routine — you stop thinking about cleaning, and that's the goal.

If at 90 days you're still seeing the same issues you had with the previous vendor, the new vendor probably isn't the right fit either. Go back to the scorecard and document the issues for your records. You'll know within 90 days.

Common mistakes school business managers make

After working with K-12 school business managers for over a decade, here are the patterns we see most often:

1. **Waiting too long to start.** Starting in April for a July 1 changeover is too late. January is right.
2. **Not getting the budget approved before the RFP.** You'll lose political capital fighting for budget at the same time you're trying to pick a vendor.
3. **Not walking the building with the vendor.** Quotes without walkthroughs are guesses.
4. **Choosing on price alone.** The cheapest vendor that misses days costs more in incidents, complaints, and staff time than a more expensive vendor that doesn't.
5. **Not reference-checking.** Skip this and you're trusting the proposal at face value.
6. **Signing a long-term contract without out clauses.** 30-day out is standard. A vendor that won't offer it is signaling they expect you to want to leave.
7. **Telling the current vendor too early.** Hold notice until 30 days out.
8. **No day-30 / day-90 review schedule.** Without checkpoints, problems get filed under "I'll deal with it later" until they're crises.

What's next

If you're at the start of a vendor change process, you'll also want our **RFP Best Practices Guide** — a deeper companion document that walks through writing the RFP itself, scoring vendor responses, and structuring the procurement timeline.

If you're at a school in Utah and want to talk about whether Advanced Building Care is a fit for your network, we offer same-business-day quotes and a 15-minute walkthrough — no obligation. Call (801) 618-0601 or visit advancedbuildingcare.com.

Whatever you do — and whether or not you choose ABC — we hope this playbook makes the next 6 months a little less stressful and a lot more documented.

— *The team at Advanced Building Care*