

City of Burlington, Vermont

Draft Scope of Work for

Asset Management Program Development Phase II

I. GENERAL INFORMATION & SCHEDULE

The City of Burlington, Vermont (“City”) is seeking proposals for a consultant(s) to perform a comprehensive analysis of the City’s Department of Public Works, General Fund, and Department of Parks, Recreation and Waterfront physical assets along with their maintenance operations, practices, and policies with the goal of creating an Asset Management Plan, and developing specifications for and procuring an appropriate asset management/computerized maintenance management system (CMMS) software.

Date of Issuance: August 31, 2017

Issued by: City of Burlington

Due Date for Questions: September 18, 2017 by 5PM ET
Reponses will be available by September 25, 2017 by 5PM ET

Due Date for Responses: September 29, 2017 by 12PM ET

Contact: Martha Keenan, CIP Manager
City of Burlington
645 Pine Street
Burlington, VT 05401
mkeenan@burlingtonvt.gov

Questions concerning this RFP must be made via email per the schedule above. Responses to all submitted questions will be posted at <https://www.burlingtonvt.gov/RFP>.

Project Background and Understanding

Burlington is the most populous city in the U.S. state of Vermont and the seat of Chittenden County. It is located 45 miles (72 km) south of the Canada–United States border and 94 miles (151 km) south of Canada's second most populous city of Montreal. The municipal population was 42,452 according to a 2015 U.S. census estimate.

A regional college town, Burlington is home to the University of Vermont (UVM) and Champlain College, a small private college. Vermont's largest hospital, the UVM Medical Center, is located within the municipal limits. In 2015, it became the first city in the U.S. to run completely on renewable energy.

In 2015, the Water Resources Division within the Department of Public Works of the City of Burlington contracted with Hoyle, Tanner and Associates, Inc. (HTA) for Asset Management

Planning and Implementation Phase 1. Phase 1B, Task 2 of that contract required Hoyle-Tanner to prepare a Scope of Work for a Phase 2 Asset Management Program Development. This Scope of Work document fulfills this requirement and builds on the accomplishments of Phase 1 toward the City's goal of planning for and implementing an asset management program.

Phase 1 consisted of interviews across 19 functional groups to assess the status of asset management across City departments and to develop a Preliminary Strategic Asset Management Plan (*SAMP*) with recommendations on how to proceed with the development of Asset Management Plans and Policy. The Preliminary SAMP found that most functional groups are receptive to moving forward with an Asset Management Program. The Water Resources Division has been working with HTA to complete Phase 2, consisting of similar workshops to those requested in this RFP and is working to develop an Asset Management Plan for that Division's assets. They have developed functional requirements and are ready to begin the process of looking at Computerized Management and Maintenance Systems (CMMS). As our goal is to identify one solution that meets the needs of all City departments, they are awaiting the completion of this project in order to take part in the last portion of this RFP, to interview and see presentations on potential CMMS systems that could be utilized by the City of Burlington as a whole.

The City would like to expand its efforts to formalize asset management in the future to include all City assets. As a next step, the City is requesting proposals to assist it in developing asset management plans for two additional departments: the Department of Public Works, including Engineering, Traffic, and Streets and Sidewalks; and the Department of Parks, Recreation and Waterfront, including Public Buildings. This Scope of Work details the tasks and deliverables designed to meet the following goals:

1. Develop a sustainable City-wide asset management capability that ensures the City can best steward its assets.
2. Develop an Asset Management Plan (AMP), in conjunction with appropriate city staff, that includes the buildings, parking garages, traffic, fleet, streets and sidewalks, ROW, Parks, grounds inventory and a management system
3. Document the value of formalized asset management and assess city-staff support that would be required for a plan
4. Provide detailed training for staff members on the processes and procedures for maintaining the assets held within Public Works and Parks
5. Coordinate with Fleet vehicle consultant to ensure fleet asset management workshops utilize SOPs and other data and systems developed through the fleet assessment process.
6. Discuss potential integration with the City's financial asset management software (Sage) or City's accounting software.
7. Include an report for senior leadership with recommendations regarding organizational structure and support necessary to sustain the practice of asset management for the City of Burlington.
8. Develop detailed specifications and functional requirements that can be used as part of an RFP for a Computerized Maintenance Management System (CMMS) purchase.

Coordinate interviews and presentations with potential vendors, and coordinate implementation.

To most cost effectively achieve these goals the City of Burlington is looking for a consultant to work with the City through the above tasks. It is our expectation that:

-) Goals 1 through 6 will be accomplished through a series of workshops and related activity designed to train and engage Public Works and Parks staff in the development of an Asset Management Plan.
 - o Goal 5 will be accomplished in partnership with the vendor to be selected to perform a comprehensive analysis of the City's fleet management and maintenance operations, practices, and policies. That RFP was issued August 14, and a vendor is expected to be selected by early October.
-) Goal 7 will be accomplished through a written report.
-) Goal 8 will be accomplished through a process that will assure that the Public Works Department, and Parks, Recreation and Waterfront Department along with the Water Resource Division of Public Works will select a CMMS application that will meet the needs of the Departments and provide the opportunity/functionality to meet the future needs of other departments across the City, including the potential for other Enterprise Departments such as Burlington Electric Department, the Burlington International Airport, and the Burlington School District. The City's IT team will participate in this project to help ensure successful selection and implementation, as well as expansion to other departments.

As the scope of this engagement is broad and will require varied skill sets, the City will accept proposals for either:

-) The entire engagement (items 1-8 above); or
-) The process and related aspects of the engagement (items 1-7 above); or
-) The recommendation and interview process for the CMMS (item 8 above).

Though this RFP outlines our minimum expectations for addressing the needs and goals identified, the City expects that vendors will be thoughtful in their responses to this RFP and will propose additional steps and deliverables that they believe will lead to the best possible outcomes for the City in the completion of this project, development of an effective, successful asset management plan, and selection of a CMMS that enables the City to better steward the assets for which it is responsible. The City understands that active participation by City staff will be required to realize the objectives of this scope of work. Furthermore, the City has designated an individual to serve as the General Fund Asset Management leader over the entire course of the project. This individual will be the prime contact and will be

expected to participate in all activities defined in this scope as we strive to deliver continuity across functional groups in the City of Burlington.

Scope of Work

While the City of Burlington is looking for the following scope of work, , we encourage proposals to include different steps, identifying the associated logic related to the changes, should they feel they are necessary to lead to the best possible project. In all workshops in which fleet asset management is to be discussed, the work must build on materials and outcomes of the fleet assessment so as to not duplicate or redirect the work done by the fleet assessment process

A. Train staff and develop an Asset Management Plan

The following tasks define a process designed to lead Public Works and Parks decision makers through a workshop based process that will serve to train, build consensus, and develop the content of the Asset Management Plan (AMP). The AMP is defined as "A plan developed for the management of one or more infrastructure assets that combines multi-disciplinary management techniques (including technical & financial) over the life cycle of the asset in the most cost effective manner to provide a specific level of service." The goal of this process is to not only develop a Plan, but to instill a sense of ownership in the Plan among the staff who participate. The consultant will plan and lead the activities identified herein, and City decision makers will participate as members of the team.

The term “decision makers” refers to City staff who hold a supervisory role and/or influence decision making within the organization, are willing and able participants, and are ready to share responsibility for implementing the AMP developed through these tasks. The City will select staff from the field, operations, and engineering who meet these requirements. The City expects the selected consultant will assist with determining the appropriate composition of this team. The City Asset Management leader (previously introduced) is also a decision maker.

The scope covers assets in the City’s Department of Public Works, including the Traffic Division, and those in the Department of Parks, Recreation and Waterfront system.

A.1 Kick-off and Asset Management Training Workshop

Participants: City decision makers (maximum 4 from each workshop) from each of the asset classes and Asset Management leader

Time: 5 hours (1 hour kick-off meeting, followed by 4 1-hour workshops with breaks)

Location: In a City conference room equipped with a white board and a projection screen (or suitable wall).

The kick-off meeting will consist of team introductions, review of this scope, deliverables, process, schedule and communications with time for questions and answers.

The Asset Management Primer Workshop will draw on information available from the EPA, ISO 55000 and other sources interjected with the consultant's experience and insight on Asset Management best practices. For attendees who are already educated in Asset Management the course material will be familiar, while others will find the material new and informative. For all it will be an opportunity for consensus building as we engage City participants with questions and discussion points designed to help decision makers form consensus.

Topics included in the Asset Management Primer Workshop should include, though may be expanded beyond:

-) Why we need Asset Management
 - o *Business drivers in the municipal environment*
-) What is Asset Management
 - o *Illustrative views to define asset management*
 - o *Asset Management best practices*
-) Inventory
-) Condition and Performance
-) Components of Risk
 - o *Consequences of Failure and Criticality*
 - o *Likelihood of Failure*
 - o *Failure modes*
 - o *The Risk matrix for guiding actions and decisions*
-) Applications of Risk
 - o *CIP*
 - o *Risk Based Inspections*
-) Life Cycle Costing
 - o *Triple bottom line costs*
 - o *Application for project selection*
-) Long term forecasting
 - o *Deterioration curves (aka survival curves)*
-) The Asset Management System
 - o *Policies, Processes, People, Tools, Information Systems*

Deliverables:

1. Digital copies of material presented during the workshop
2. A memo developed by the consultant that summarizes the key points learned and decisions made during the workshop(s).

City Responsibilities:

1. Participation in the workshop

A.2 Develop Level of Services

Level of Service goals are one of the fundamental building blocks of an asset management system as they reflect the mission of the organization in absolute terms for customer service, regulatory compliance and the working environment. Level of Service goals, both qualitative and quantitative, will be developed in terms that are measurable and achievable. While a separate Level of Service table will be developed for each asset class, we may find cause to include Level of Service goals across all asset groupings.

A.2.i Develop Level of Services for 1) Buildings,2) Fleet, 3) (Streets, Sidewalks, ROW), 4) (Parks and Grounds),5) (Traffic & Parking Garages) (5 workshops)

1. Level of Service workshop

Participants: City decision makers representing each asset class and the City Asset Management leader

Time: 3 Hours for each workshop x 5 = 15 hours

Location: In a City conference room equipped with a white board and a projection screen (or suitable wall)

The Consultant will prepare material ahead of the workshop that include Level of Service examples for others, prepare an agenda, and lead the workshop. During the workshop we will seek to identify Level of Services that the City already practices (written or not), compare them with our examples, and collaborate to develop written Level of Service goals suitable for Burlington. The workshop will begin with an overview of Level of Service criteria for all attendees, followed by breakout sessions for each group, completing with presentations by each group for comment and discussion.

2. Assist City to finalize Level of Service goals

After the workshop, the Consultant will provide up to 48 hours of assistance to City decision makers in order to finalize Level of Service goals. Specific tasks to be performed will be decided on after the workshop.

Deliverables:

1. Digital copies of material used in the workshop
2. Up to 48 hours of Level of Service goal assistance after the workshop

City Responsibilities:

2. Participation in the workshop by at least 2 decision makers from each group plus the City Asset Management leader.
3. Finalization of the Level of Service goals

A.3 Assess Inventory

Inventory assessment consists of identifying the completeness of the inventory as well as the processes used to maintain it. In this task, the Consultant will lead workshops where we will ask City staff to present the current state of the inventory of each asset category. We will focus on how the assets are organized (asset class, asset type), the completeness of the asset attributes (size, material, age, etc.), and how the assets are located. In turn, the Consultant will present to City staff examples of data models used by others. Data that is most beneficial for best Asset Management practices including the construct of a unique identifier field will be discussed. We will also discuss considerations and methods for valuation and retiring assets when there is an asset management system in place.

There will be five Workshops. One each for the asset classes. Each workshop will follow the same basic outline as shown in A.3.i.

After each workshop the Consultant will develop an inventory assessment report suitable for inclusion in the Asset Management Plan.

A.3.i Inventory assessment for the Buildings, fleet, grounds management, parking garages, Streets, Sidewalks & ROW, Parks

1. Inventory assessment workshop

Participants: Decision makers, City Asset Management leader

Time: 4 Hours x 6 = 24 hour's total

Location: In a City conference room equipped with a white board and a projection screen (or suitable wall)

The Consultant will prepare material ahead of the workshop that includes review of the pertinent software database and inventory and an agenda. The team will lead the workshop as stated under A.3 above.

2. Review inventory assessment report

The Consultant will develop a report that

- a. Summarizes the inventory by asset type
- b. Provides a written assessment of the completeness of the inventory

- c. Documents existing practices used to maintain the inventory
- d. Evaluate effectiveness of the software system being utilized presently (if there is one) and any gaps. Recommends whether a CMMS could better meet the City's goals and needs.

The report will be developed in draft form, submitted to City workshop attendees for review and comment, and then finalized by the Consultant. The report will be developed for inclusion in the Asset Management Plan.

Deliverables:

- 1. Digital copies of material used in the workshop
- 2. Inventory assessment report for each asset type (6) system assets

City Responsibilities:

- 1. Prepare to present the status of the inventory prior to the workshop
- 2. Present current status and participate in the workshop
- 3. Review and comment on the inventory assessment report

A.4 Condition and performance assessment

Condition is typically determined through a visual observation of an asset, while performance is typically determined through measurements. Age and life expectancy are also included as a proxy of condition. In this task the Consultant will assist the City staff to assess the current status and completeness of City's condition and performance methods and data for each asset type. For each workshop the team will ask City staff to present the current status and methods used to determine condition and performance for each asset type. In turn, the Consultant will be prepared to discuss and present methods conducive for asset management. The discussion will include but not be limited to hours run, maintenance costs, age and life expectancy.

After each workshop the Consultant will develop a condition and performance assessment report suitable for inclusion in the Asset Management Plan.

A.4.i Condition and performance assessment for the buildings, grounds maintenance, Parks, Streets, Sidewalks/ROW, and Traffic/parking garages (5 workshops)

1. Condition-performance assessment workshop

Participants: Related City staff, City Asset Management leader

Time: 3 Hours each workshop x 5 = 15 hours

Location: In a City conference room equipped with a white board and a projection screen (or suitable wall)

The Consultant will prepare material ahead of the workshop that includes example methods and an agenda. The team will lead the workshop as stated under A.4 above.

2. Develop a condition and performance assessment report

The Consultant will develop a report that

- a. Summarizes current condition and performance by asset type.
- b. Provides a written assessment of the completeness of the condition and performance data for each asset type.
- c. Documents existing practices used to determine condition and performance
- d. Recommends how to determine condition and performance for each asset type for the purposes of asset management

The report will be developed in draft form, submitted to staff workshop attendees for review and comment, and then finalized by the Consultant. The report will be developed for inclusion in the Asset Management Plan.

Deliverables:

1. Digital copies of material used in the workshop
2. Condition and performance assessment report

City Responsibilities:

1. Prepare to present the status of condition and performance assessments prior to the workshop
2. Present current status and participate in the workshop
3. Provide information for the condition and performance assessment report as requested post workshop
4. Review and comment on the condition and performance assessment report

A.4.ii Condition and performance assessment for the Fleet –In conjunction with consultant providing Fleet analysis

1. Fleet condition-performance assessment workshop

Participants: Fleet decision makers, City Asset Management leader, Fleet consultant

Time: 5 Hours

Location: In a City conference room equipped with a white board and a projection screen (or suitable wall)

The Consultant will prepare material ahead of the workshop that includes example methods and an agenda. The team will lead the workshop as stated under A.4 above.

Create fleet workshops similar in nature to others, however utilizing and basing discussion and materials on outcome of the fleet assessment and without duplicating those efforts.

A.5 Develop criteria for determining risk and criticality

In the first workshop (task A.1), attendees will learn that risk is the product of consequence of failure and likelihood of failure. We will also learn that there are multiple consequences of varying importance and severity that could occur if an asset fails, and that there is more than one way that an asset might fail. In this task, the Consultant will build on the first workshop, Level of Service, and the condition and performance workshops to assist City staff develop criteria for each asset type that will be used to calculate risk and criticality. In the Consequence of Failure workshop, we will emphasize the best management practice to develop a common set of consequences of failure across all of the systems by including decision makers from all of the asset classes in one workshop. After we develop the list of common consequences we will split into groups to begin the development of severity criteria tables for each asset type. The second workshop will be held to focus on developing failure mode criteria as it relates back to condition, performance, age and life expectancy for each utility's asset types. The second set of workshops will also include training on how to use the criteria to determine risk and criticality.

After the Consequence of Failure workshop the Consultant will provide up to 40 hours to help each group develop consequence severity criteria for each asset type. The Consultant will also provide up to 50 hours after the second workshop to develop likelihood of failure criteria and calculate risk and criticality.

A.5.i Develop Consequence of Failure criteria for Facilities, Fleet, Parks and grounds, Streets/ Sidewalks and ROW, Traffic/parking garages, and Grounds (five workshops)

1. Consequence of Failure workshop

Participants: Related Decision makers from each asset group, Asset Management leader

Time: 3 Hours per workshop x 5 workshops = 15 hours

Location: In a City conference room equipped with a white board and a projection screen (or suitable wall)

The Consultant will prepare material ahead of the workshop that includes example consequences, severity tables, and an agenda. The team will lead the workshop as stated under A.5 above.

2. Assist staff develop consequence severity tables

Developing consequence severity tables for every asset type will take more time than allotted in the workshop. After the workshop, each group will continue to develop the consequence severity tables for each asset type according to the methods developed in the workshop. The Consultant will provide up to a total of 40 hours to assist the groups through the process.

Deliverables:

1. Digital copies of material used in the workshop
2. Up to 40 hours of support to develop consequence severity tables

City Responsibilities:

1. Participation in the workshop
2. Develop consequence severity tables for each asset type

A.5.ii Develop likelihood of failure criteria, calculate risk and criticality for Facilities, Fleet, Grounds, Streets/Sidewalks/ROW, Traffic/parking garages, and Parks/grounds maintenance assets – 5 workshops

1. Likelihood of Failure, risk and criticality workshop

Participants: Related decision makers, City Asset Management leader

Time: 4 Hours each workshop x 5 workshops = 20 hours

Location: In a City conference room equipped with a white board and a projection screen (or suitable wall)

The Consultant will prepare material ahead of the workshop that includes example likelihood of failure criteria, risk and criticality calculations, and an agenda. The team will lead the workshop as stated under A.5 above.

2. Assist staff to finish developing likelihood of failure criteria, calculate risk and criticality

After the workshop City staff will be responsible to complete the likelihood of failure criteria, risk and criticality calculations started during the workshop. The Consultant will provide up to 30 hours of assistance through the process.

Deliverables:

1. Digital copies of material used in the workshop

2. Up to 30 hours of post workshop assistance to develop likelihood of failure criteria and calculate risk and criticality

City Responsibilities:

1. Participation in the workshop
2. Develop likelihood of failure criteria and apply methods to calculate risk and criticality for each asset type with assistance from the Consultant

A.6 Develop life cycle costing and long term budget needs policy

The goals of an asset management system include extending the life of assets as long as possible at a minimal level of risk. As a basis to develop policies for life cycle costing and long term budget forecasting The Consultant will lead a training workshop that includes the decision makers from all of the groups. In this workshop, we will explore the relationship of social, environmental and financial costs (the “triple bottom line”) with the consequences of failure. We will then demonstrate how to use these considerations along with capital and O&M costs to compare the net present value of candidate projects using life cycle benefit-cost analysis. We will also explore how deterioration curves (aka survival curves) can be used to determine long term budget needs for entire asset classes. Long term budget needs can then be used to determine if current funding levels are adequate. After these sessions, we will split up by group to start formulating the group’s policy for life cycle costing and determining long term budget needs.

After the workshop, each group will be responsible for developing policies suitable for inclusion in the Asset Management Plan. The Consultant will provide up to a total of 40 hours to assist the groups to formulate their policies.

1. Life cycle costing and long term budget forecasting workshop

Participants: Related decision makers, City Asset Management leader

Time: 3 Hours each workshop x 5 workshops = 15 hours

Location: In a City conference room equipped with a white board and a projection screen (or suitable wall)

The Consultant will prepare material ahead of the workshop that includes examples of life cycle costing with triple bottom line and long term budget forecasting using deterioration curves. The team will lead the workshop as stated under A.6 above.

2. Assist staff develop life cycle costing and long term budget forecasting policies

After each workshop, each group will be responsible for preparing their own policies suitable for the Asset Management Plan. The Consultant will provide up to a total of 40 hours of assistance to develop these policies.

Deliverables:

1. Digital copies of material used in the workshop
2. Up to 40 hours of assistance to develop life cycle costing and long term budget need policies

City Responsibilities:

1. Participation in the workshop
2. Develop likelihood of failure criteria and apply methods to calculate risk and criticality for each asset type

A.7 Develop a Consolidated Asset Management Plan

The Consultant will coalesce the information and documentation created in tasks A.1 through A.6 into an Asset Management Plan. The Plan will be organized by topic and then by asset class (Facilities, Fleet, Parks & Grounds, Streets, Sidewalks, ROW and Traffic/parking garages) as appropriate. The Consultant will add content including an introduction and overview section as required to correlate the material into a cohesive Asset Management Plan.

Recommendations regarding organizational support and structure necessary to sustain the practice of asset management and an effective CMMS will be included in the Plan. A draft version of the Plan will be distributed to decision makers for review, edits and comments. The Consultant will incorporate feedback received and issue a final version of the Asset Management Plan.

Deliverables:

1. Draft Asset Management Plan for each asset group in MS Word
2. Meeting to review the draft Asset Management Plan
3. Final Asset Management Plan for each asset group delivered as an electronic document in MS Word and PDF

City Responsibilities:

1. Review and provide feedback on the draft Asset Management Plan
2. Meet to review the draft Asset Management Plan
3. Accept the final Asset Management Plan

- B. Provide an Executive report.** Provide a written report of the work achieved and the overall goals of asset management and recommend the organizational structure and resources that will be necessary to sustain the proposed practices and solutions.

Deliverables:

1. Propose the appropriate organizational structure that will be necessary to ensure that the asset management practices are sustained and thrive into the future.
 - * Recommend appropriate reporting structure (solid and dotted lines)
 - * Propose necessary roles and number of staff, identifying where existing staff can be assigned and which require additional headcount
 - * Include any centralized staff, as well as asset management specific staff within each department
 - * Draft job descriptions should be provided for each position
2. Provide a proforma budget for ongoing asset management organization
3. Outline a transition plan for implementation of the new structure

C. Develop specifications for a Computerized Maintenance Management System – Asset Management (CMMS-AM) software solution

The following tasks will be performed to assist the City select an appropriate software package through an informed RFP process. The Consultant understands that the selection will be made based on the capabilities of the software to address the City’s needs across functional groups, horizontal assets, and vertical assets. While the software selection will be based on the needs across functional groups, implementation will focus strictly on the needs of the Facilities, Fleet, Grounds, Streets, Sidewalks, ROW, Parking garages, and Parks (General Fund assets), along with the Water Resources asset management plan.

C.1 Solicit up to three vendors to demonstrate software to City decision makers

The purpose of the vendor demonstrations is to prepare decision makers to make informed decisions through learning about the following:

- a. The variety of software solutions available
- b. Trends in the CMMS-AM industry
- c. The types of features available
- d. Integrations with other systems
- e. The support options available
- f. Potential of implementation in phases
- g. Staffing needs to maintain system – data input
- h. Vendor communication and responsiveness

The Consultant will

- a. Present a recommended list of three software vendors to City decision makers
- b. Meet with City decision makers to review the list and make any changes as deemed appropriate

- c. Contact each software vendor and provide a consistent briefing to regarding the City's goals. This will include but not be limited to CMMS functionality, GIS integration, mobile options, asset management features, facilities management, features for water-wastewater-stormwater, pavement, integration with other products such as see-click-fix, and support options. Each vendor will be told that they have up to two hours to present their product and answer questions from City staff in attendance
- d. Coordinate presentation dates and times between vendors and City decision makers
- e. Attend presentations at City of Burlington offices with City decision makers
- f. Provide a one to two page written synopsis of each software vendor's presentation
- g. Provide a comparison of pros and cons of the software systems related to the City's needs

Deliverables:

- 1. A list of three (3) recommended software vendors
- 2. Distribute material provided by the software vendor to City decision makers
- 3. Attend up to three (3) vendor presentations
- 4. A one to two page synopsis of each software presentation

City Responsibilities:

- 1. Confirm the list of recommended software vendors
- 2. Decision makers attend software presentations

C.2 Conduct a software needs assessment

The needs assessment is the first step toward creating the functional needs requirements to be included in the RFP. It is compiled from the previous workshops and tied to the initial software presentations as these may help decision makers describe their needs based on features that were demonstrated.

C.2.i Interview City decision makers who attend software presentations

The Consultant will conduct up to ten, one hour interviews with City decision makers who attend the software presentations. The interviews will focus specifically on software needs. The Consultant will prepare and distribute a sampling of the questions we intend to ask prior to the interviews in order to prepare the staff. Information gathered during these interviews will be used to develop the software needs assessment report.

Deliverables:

1. Questionnaire to be distributed prior to the interviews
2. Conduct up to ten (10), one hour interviews with City decision makers

City Responsibilities:

1. Assist the Consultant to arrange interviews
2. Attend interviews

C.2.ii Prepare and distribute a survey to appropriate City staff

“Appropriate City staff” is City staff selected who are considered stakeholders in the software. This includes anyone who may use the software as well as staff who may require reports generated from the software. A survey will demonstrate that City leaders are interested in all stakeholder feedback regarding this important software selection. The Consultant will prepare approximately twenty multiple choice questions with options to add comments. A tool such as SurveyMonkey will be considered. The questions will be submitted to the City for review and feedback before being distributed.

Deliverables:

1. Draft survey of approximately twenty questions
2. Final survey

City Responsibilities:

1. Review the draft survey and provide feedback
2. Distribute the survey to appropriate staff

C.2.iii Prepare a software needs assessment report

The report will be structured to identify and classify functional needs that are common across functional groups as well as needs that are unique to individual groups.

Deliverables:

1. Draft software needs assessment report in MS Word and/or Excel for markup
2. Final software needs assessment report in MS Word and/or Excel and PDF

City Responsibilities:

1. Review the draft software needs assessment report and provide feedback

C.2.iv Propose an implementation plan

Based on information learned about the City, its assets and its operations, as well as their experience with CMMS implementations, consultant should make a recommendation for the appropriate implementation schedule to ensure a successful CMMS implementation and launch. This should include, but not be limited to, recommending which assets are on-boarded to the new platform first; an order for adding the additional assets; a proposed timeline for implementation; and suggestions for how to test and evaluate each onboarding before moving onto the next asset.

Deliverable: Written plan.

C.3 Prepare software and implementation specifications for an RFP

The Consultant will apply our knowledge of CMMS-AM software and implementation to structure the findings from the software needs assessment into a document that includes software specifications, functional requirements, and a high-level implementation plan. The document will be suitable for inclusion in a request for proposal (RFP) document to be prepared by the City. Sections of the software and implementation specifications may include, but not be limited to:

- Overview of City goals and objectives
- Overview of existing systems used by Facilities, Fleet, Grounds, Streets, Sidewalks, ROW, Traffic , Parking Garages, Water Resources, and Parks, Recreation, and Waterfront
- Overview of city IT infrastructure¹
- Mandatory software functional requirements
- Desired software features
- Mandatory vendor requirements
- Mandatory support requirements – both business and IT staffing and recommended structure (within operational departments and IT)
- Mandatory implementation requirements
- Training requirements²
- Submittal requirements
- Evaluation criteria for scoring
- Pricing worksheet to be filled out by proposer
- Software feature checklist

¹*Overview of City IT infrastructure* will be provided by City IT. During the project, the vendor will work with City IT team to discuss the benefits and costs of onsite and SaaS solutions, and determine the most appropriate solution for the City.

²*Implementation and training requirements* will be the above asset groups and Water Resources

The City will integrate the software and implementation specifications into an RFP document prepared by the City. The Consultant will provide up to 8 hours to assist the City prepare and review the RFP document.

Deliverables:

1. Draft software and implementation specifications in MS Word for markup
2. Final software and implementation specifications in MS Word and PDF
3. Mark-up the City prepared RFP document with review comments and suggestions

City Responsibilities:

1. Review the draft software and implementation specifications and provide feedback
2. City will be responsible for all other sections of the request for proposal

D. Assist the City to select a Computerized Maintenance Management System – Asset Management (CMMS-AM) software solution

It is the expectation that a recommendation for a CMMS will emerge from this RFP. As it is an unknown at this time, please propose a price as an additional alternative as we move through the process to be considered during the consulting process. The City will be responsible for incorporating the specifications developed in task B into a request for proposals (RFP) document, issuing the RFP, and receiving the proposals submitted. The Consultant will provide software selection assistance as described in the following sections.

D.1 Assist the City to review vendor proposals

The Consultant will assist the City with reviewing the vendor proposals with a goal to narrow the list of vendors to be invited to an interview to three. The services will include scoring each proposal using the criteria defined in the software and implementation specification. The Consultant will submit the scoring results and a memorandum that summarizes our observations, scoring results and recommendations to the City. Consultant will attend one meeting with the City after the review process to discuss our findings.

Deliverables:

1. Scoring results
2. Memorandum that summarizes our observations and results
3. Attend one meeting with the City to discuss findings

City Responsibilities:

1. Actively participate in the review process

2. Make the final decision on the vendors to select for interview
3. Notify select vendors and schedule vendor interviews

D.2 Prepare 3 workflow scripts for software vendors to follow during their presentation

Drawing on information from the needs assessment, experience with CMMS-AM software, and anticipated work flows that the City will require the software to support, the Consultant will develop 3 workflow scripts for all software vendors to follow during the interviews with the City. Workflow scripts are written instructions designed to reflect how City staff will use the software. Prior to developing the workflow scripts the Consultant will collaborate with City decision makers to determine the scope of the workflows. The workflow scripts will be written in a manner to not intentionally favor a particular software vendor.

Deliverables:

1. Collaborate with City decision makers
2. Draft version of three (3) workflow scripts
3. Final version of three (3) workflow scripts

City Responsibilities:

1. Collaborate with the Consultant
2. Review and provide comments on the draft version of the three workflow scripts
3. Send the workflow scripts to the vendors

D.3 Assist City decision makers in interviewing vendors and selecting the final software vendor

The Consultant anticipates that enough distinction will be generated after the interviews for the City to confidently select the software vendor to move forward with. To help the City make this selection the Consultant will assist City decision makers prepare for the interviews for up to 3 interviews. Preparing for the interviews will be accomplished by holding a pre-interview meeting where we will define an interview agenda and some core questions that will be asked of all vendors. The intent is to gain the most value out of the interview time and provide consistency across each interview and thereby provide decision makers the ability to compare vendors on equal terms.

After each interview the Consultant will prepare a memorandum of our assessment of the vendor's performance. At the end of the interview process the Consultant will meet with the City's decision makers to discuss the selection of software vendor of choice.

Deliverables:

1. Interview agenda and core interview questions developed after the pre-interview meeting
2. Interview memorandums for three (3) software vendor interviews
3. Prepare a final recommendation memorandum

City Responsibilities:

1. City decision makers participate in pre-interview meeting
2. Make the final software vendor decision
3. Provide all communications with software vendors

III. RFP SUBMITTAL

Responses to this RFP should address how your firm would assess and evaluate the current state and needs of each department, and the steps you would take to develop a proposed solution that achieves the goals outlined. The response should address how your firm would perform the above stated tasks.

As the scope of this engagement is broad and will require varied skill sets, the City will accept proposals for either:

-) The entire engagement (items 1-8 above); or
-) The process and related aspects of the engagement (items 1-7 above); or
-) The recommendation and interview process for the CMMS (item 8 above).

If bidding on only one portion, please explain how you will interact with the other vendor to ensure continuity of the project as a whole.

Responses to this RFP must be not more than 30 pages in length (15 double-sided or 30 single-sided pages) and include the following:

- 1) Qualifications Detail consisting of:
 - a) Cover letter including statement of understanding & approach to this project; the statement should describe the applicant's understanding of the project and the special skills, collaborative approach, and innovative thinking that the team would bring to the project.
 - b) Attachment A (provided in this RFP): Signed by a representative of lead consultant attesting that all terms, conditions and procedures outlined in this RFP are understood and have been followed;
 - c) Organizational Overview: A description of the applicant's organization, years in existence, structure, composition, and qualifications.
 - d) Proposed Project Team Members: Clearly indicate the applicant's designated team leader for the project, as well as the specific individuals who will be assigned to the work, their primary role(s) on the project, and their respective expertise in such work.
 - e) Partners: An explanation of any partnering arrangements that have been or will need to be made in order to complete the work.
 - f) Specific Project Experience: Descriptions detailing completed, similar or relevant project experience, especially municipal or other governmental experience, which the applicant has executed. Applicants are encouraged to include projects that involved members from the proposed project team.

- g) List of References: Provide a minimum of three client references with which the applicant has provided similar consulting services within the last five years: at least two references should be municipal or state government entities. Include the name and telephone number of the contact person and a description of the role and services provided to that contact.

2) Technical Proposal consisting of:

- a) An executive summary explaining the recommended work;
- b) A detailed description of the proposed work and methods to be used, an explanation of any variances to the proposed scope of work as outlined in the RFP;
- c) A scope of work that includes steps to be taken, including specifics of any deliverables to be produced;
- d) A detailed work plan that includes:
 - o clear deliverables, milestones, and deadlines, as well as an overall time for completion with proposed schedule;
 - o expectations of time required from City staff;
 - o a list of information your team will expect the City to provide at the start of the project;
- e) Any other information deemed necessary to address the requests of this RFP.

3) Cost Proposal consisting of:

- a) A composite schedule of direct labor hours by task;
- b) An itemized schedule of all expenses, including both labor and direct expenses;
- c) A maximum budget amount inclusive of all fees and expenses specifying a fixed cost or time and materials basis.
- d) Any potential realization of cost savings by the City
- e) Pricing for each component of the scope of work outlined above, to allow for the City to make a meaningful decision about which services offered best meet its needs and fit within its budgetary constraints.
- f) Please provide as complete a proposals as possible, and include estimates of labor, materials, and cost-reimbursable items such as travel. The City must be able to compare services and their cost from different Respondents in a meaningful way. Facilitating this process will only work in the Respondent's favor.

Responses to this RFP must be received per the schedule outlined on Page 1 to be considered. Proposals must be submitted in both digital (PDF) and printed formats.

Provide two (2) print copies of the proposal in addition to the digital file, which may be emailed or submitted on a USB drive. Applicants will receive a confirmation email once their proposal is received. Please ensure that the document is easily printable in an 8.5x11 format.

Additional requirements are as follows:

-) Applicants are solely responsible for ensuring that proposals arrive on time.
-) Each applicant **MUST** provide their submittal electronically as a PDF.
-) Additional detail beyond the contents described above **WILL NOT** be considered.
-) Faxed proposals **WILL NOT** be accepted.
-) Late replies **WILL NOT** be considered.

The City of Burlington does not tolerate unlawful harassment or discrimination on the basis of political or religious affiliation, race, color, national origin, place of birth, ancestry, age, sex, sexual orientation, gender identity, marital status, veteran status, disability, HIV positive status or genetic information.

The City is also committed to providing proper access to services, facilities, and employment opportunities.

Bids should be sent in a sealed envelope to the contact listed above.

Bidders must comply with all provisions of state law, and the accepted bidder will have to comply with the city's requirements, including its insurance requirements and livable wage and union deterrence ordinances, copies of which are available on the city's website (or may be supplied on request).

Questions

Questions may be submitted by email by the deadline identified above. Any revisions, addendums and answers to questions that are received by the due date for questions will be posted to the City's website at <https://www.burlingtonvt.gov/RFP>.

Bid Evaluation

In compliance with the City of Burlington's Procurement Policy, City staff will evaluate all complete proposals from qualified consultants. Consultants will be scored up to a maximum of 100 points based on the following criteria:

- 1) **Experience & Qualifications** relevant to key personnel and/or sub-contractors (15 pts)
- 2) **Project Understanding & Knowledge of Area** depth of relevant technical experience (25 pts)
- 3) **Ability to Meet Schedule** efficient schedules receive higher scoring (10 pts)

- 4) **Budget & Value** as related to proposed and additional costs (15 pts)
- 5) **Depth of Skills** related to technical aspects of project (15 pts)
- 6) **Demonstrated Innovative Approaches** to identifying solutions (10 pts)
- 7) **Level of Experience** with projects of similar size, structure and complexity (10 pts)
- 8) **Quality, Clarity & Completeness** of submittal package (10 pts)

Responses will be reviewed by City staff, and possibly its consultants, based upon the information provided in the proposal. Additional information may be requested prior to final selection. The city intends to accept the bid it determines to be in the best interests of the city, based on the overall proposal, not exclusively on cost or any other specific factor or sum of factors. The city reserves the right to amend, modify, reject, negotiate, or accept any bid in whole or in part at its sole discretion. It is anticipated that a decision will be made within 30 days of the due date.

VI. TERMS & CONDITIONS

It will be necessary for responding parties to comply fully with the following terms and conditions outlined in this document if they are to be considered. A letter attesting that the respondent has read, understands, and followed all procedures is a part of this RFP must be included as part of the final submittal (see Attachment A).

Communications

It is extremely important that all respondents are given clear and consistent information. Therefore, all respondents are required to submit any questions related to this project or RFP process via email. Responses to all submitted questions will be posted on the City of Burlington website at: <https://www.burlingtonvt.gov/RFP>. Questions concerning this RFP must be received via email per the schedule outlined on page 1. Inquiries received after this date will not be considered or answered.

Respondents should not communicate with any City department or employee during the submission process except as described above. In addition, no communications should be initiated by a respondent to any City Official or persons involved in evaluating or considering the statement of qualifications or proposals. Communication with any parties for any purpose other than those expressly described herein may cause an individual firm, or team to be disqualified from participating.

General Compliance with Laws

The Consultant shall comply with all applicable Federal, State and local laws, including but not limited to the Burlington Livable Wage Ordinance, Union Deterrence, Outsourcing, and City insurance requirements. A certificate of compliance with the Livable Wage ordinance will be required. The Livable Wage ordinance can be found at the following link: <http://www.burlingtonvt.gov/CT/Livable-Wage-Ordinance/>.

Provisions of the resulting Agreement shall be interpreted and implemented in a manner consistent with each other and using procedures that will achieve the intent of both parties. If, for any reason, a provision in the Agreement is unenforceable or invalid, that provision shall be deemed severed from the Agreement, and the remaining provisions shall be carried out with the same force and effect as if the severed provisions had never been a part of the Agreement.

OWNERSHIP OF DOCUMENTS

Proposals, plans, specifications, and other documents prepared and submitted under this RFP shall become the property of the City.

PUBLIC RECORDS

Any and all records submitted to the City, whether electronic, paper, or otherwise recorded, are subject to the Vermont Public Records Act. The determination of how those records must be handled is solely within the purview of City. All records considered to be trade secrets, as that term is defined by subsection 317(c)(9) of the Vermont Public Records Act, shall be identified, as shall all other records considered to be exempt under the Act. It is not sufficient to merely state generally that the proposal is proprietary or a trade secret or is otherwise exempt. Particular records, pages or section which are believed to be exempt must be specifically identified as such and must be separated from other records with a convincing explanation and rationale sufficient to justify each exemption from release consistent with Section 317 of Title 1 of the Vermont Statutes Annotated.

Other terms

Costs for preparing your proposal in response to this request are solely the responsibility of the respondent. The City of Burlington, Vermont assumes no responsibility and liability for costs incurred by parties responding to this RFP or responding to any further requests for interviews, additional data, etc., prior to the issuance of the contract. The City of Burlington reserves the right to accept or reject any or all Statement(s) of Qualifications or proposals, with or without cause, and to waive immaterial defects and minor irregularities in responses. All decisions related to this solicitation by the City will be final. The City reserves the right to request clarification of information submitted and to request additional information of one or more respondents. All materials submitted in response to this RFP will become the property of the City upon delivery. This solicitation in no way obligates the City of Burlington to award a contract.

Equal Opportunity: the selection of consultant shall be made without regard to race, age, color, religion, sex, sexual orientation, gender identity, marital status, veteran status, disability, HIV positive status, genetic information or political affiliation. The City of Burlington is an Equal Opportunity Employer and encourages proposals from qualified minority and woman-owned businesses.

REGISTRATION

A successful consultant must be registered with the Vermont Secretary of State's office as a business entity doing business in the State of Vermont at all times the contract is effective. This registration must be complete prior to the execution of a contract.

INSURANCE:

Prior to beginning any work CONTRACTOR shall obtain the following insurance coverage from an insurance company registered and licensed to do business in the State of Vermont and having an A.M. Best insurance rating of at least A-, financial size category VII or greater (www.ambest.com). The certificate of insurance coverage shall be documented on forms acceptable to the City of Burlington. Compliance with minimum limits and coverage, evidenced by a certificate of insurance showing policies and carriers that are acceptable to the City of Burlington, must be received prior to the effective date of the Agreement. The insurance policies shall provide that insurance coverage cannot be canceled or revised without thirty (30) days prior notice to the City of Burlington for cancellation. In the event that this Contract extends to greater than one year, evidence of continuing coverage must be submitted to the City of Burlington on an annual basis. Certified copies of any insurance policies may be required. Each policy (with the exception of professional liability and workers compensation) shall name the City of Burlington as an additional insured for the possible liabilities resulting from Contractor's actions or omissions. It is agreed that the liability insurance furnished by the CONTRACTOR is primary and non-contributory for all the additional insured. The Parties, for themselves, their insurers, and their officers, employees and agents, do hereby mutually waive all rights of subrogation on any claims of general liability, auto liability, and worker's compensation.

CONTRACTOR is responsible to verify and confirm in writing to the City of Burlington that:

(a) All SUB-CONTRACTORS, agents or workers meet the minimum coverage and limits plus maintain current certificates of coverage for all SUB-CONTRACTORS, agents or workers. SUB-CONTRACTORS must comply with the same insurance requirements as MOPA.

(c) All work activities related to the agreement shall meet minimum coverage and limits.

No warranty is made that the coverage and limits listed herein are adequate to cover and protect the interests of CONTRACTOR for Contractor's operations. These are solely minimums that have been developed and must be met to protect the interests of the City of Burlington.

GENERAL LIABILITY AND PROPERTY DAMAGE:

With respect to all operations performed by Contractor, SUB-CONTRACTORS, agents or workers, it is Contractor's responsibility to insure that general liability insurance

coverage, on an occurrence form, provides all major divisions of coverage including, but not limited to and with limits not less than:

1. Premises Operations
2. Independent CONTRACTORS' Protective
3. Products and Completed Operations
4. Personal Injury Liability
5. Contractual Liability
6. Broad Form Property Damage
7. Medical Expenses
8. Collapse, Underground and Explosion Hazards

1. General Aggregate	\$2,000,000
2. Products-Completed/Operations Aggregate	\$2,000,000
3. Personal & Advertising Injury	\$1,000,000
4. Each Occurrence	\$1,000,000
5. Fire Damage (Any one fire)	\$ 250,000
6. Med. Expense (Any one person)	\$ 5,000

WORKERS' COMPENSATION: With respect to all operations performed, CONTRACTOR shall carry workers compensation insurance in accordance with the laws of the State of Vermont and ensure that all SUB-CONTRACTORS and SUBCONTRACTORS carry the same workers' compensation insurance for all work performed by them under this contract. Minimum limits for Employer's Liability:

- (a) Bodily Injury by Accident: \$500,000 each accident
- (b) Bodily Injury by Disease: \$500,000 policy limit, \$500,000 each employee

PROFESSIONAL LIABILITY INSURANCE:

(a) General. The Consultant shall carry architect's/engineers professional liability insurance covering errors and omissions made during their performance of contractile duties with the following minimum limits:

\$3,000,000 - Annual Aggregate

\$1,000,000 - Per Occurrence

(b) Deductibles. The Consultant is responsible for any and all deductibles.

(c) Coverage. Prior to performing any work, the Consultant agrees to provide evidence of E&O insurance coverage defined under this Section. In addition, the Consultant agrees to attempt to maintain continuous professional liability coverage for the period of the agreement and whenever applicable any construction work related to this agreement, and for a period of five years following substantial completion, if such coverage is reasonably available at commercially affordable premiums.

AUTOMOBILE LIABILITY: The CONSULTANT shall carry commercial automobile liability insurance covering all motor vehicles, including owned, non-owned and hired, used in connection with the agreement. Each policy shall provide coverage with a limit not less than: \$1,000,000 - Combined Single Limit for each occurrence.

UMBRELLA LIABILITY:

\$1,000,000 Each Event Limit

\$1,000,000 General Aggregate Limit

INDEMNIFICATION

The Consultant will act in an independent capacity and not as officers or employees of the Municipality. The Consultant shall indemnify, defend and hold harmless the Municipality and its officers and employees from liability and any claims, suits, expenses, losses, judgments, and damages arising as a result of the Consultant's acts and/or omissions in the performance of "non-professional services" under this contract. As used herein, "non-professional services" means services provided under this Agreement other than professional services relating to the design and/or engineering of all or part of the project. The Municipality shall notify the Consultant in the event of any such claim or suit covered by this Subsection and the Consultant shall immediately retain counsel and otherwise provide a complete defense against the entire claim or suit arising out of "non-professional services" provided under this Agreement. The Consultant shall indemnify the Municipality and its officers and employees in the event that the Municipality, its officers or employees become legally obligated to pay any damages or losses arising from any act or omission of the Consultant arising from the provision of "non-professional services" (as defined herein) under this Agreement.

The Consultant shall indemnify and hold harmless the Municipality and its officers and employees from liability and any claims, suits, expenses, losses, judgments, and damages arising as a result of the Consultant's acts and/or omissions in the performance of "professional services" under this contract. The Consultant shall not be obligated to defend the Municipality and its officers and employees against claims or suits arising from the Party's provision of engineering design services or architectural design services. The Consultant shall be obligated to indemnify and hold the Municipality, its officers and employees, harmless from and against monetary damages to third parties, together with reasonable costs, expenses and attorney's fees incurred and paid by the Municipality in defending claims by third parties (collectively "Damages") but only in the event and to the extent such Damages are incurred and paid by the Municipality as the proximate cause of negligent acts, errors or omissions ("Professional Negligence") by the Consultant, its employees, agents, consultants and subcontractors, in providing the professional services required under this Agreement. As used herein, "Professional Negligence" or "negligent acts, errors or omissions" means a failure by the Consultant to exercise that degree of skill and care ordinarily possessed by a reasonably prudent design professional practicing in the same or similar locality providing such services under like or similar conditions and circumstances.

After a final judgment or settlement, the Consultant may request recoupment of specific defense costs and may file suit in Vermont Superior Court, Chittenden Unit, Civil Division, requesting recoupment. The Consultant shall be entitled to recoup costs only upon a showing that such costs were entirely unrelated to the defense of any claim arising from an act or omission of the Consultant.

The Municipality is responsible for its own actions. The Consultant is not obligated to indemnify the Municipality or its officers, agents and employees for any liability of the Municipality, its officers, agents and employees attributable to its, or their own, negligent acts, errors or omissions.

In the event the Municipality, its officers, agents or employees are notified of any claims asserted against it or them to which this Indemnification clause may apply, the Municipality or its officers, agents and employees shall immediately thereafter notify the Consultant in writing that a claim to which the Indemnification Agreement may apply has been filed.

RELATIONSHIP

The parties agree that Contractor is an independent CONTRACTOR. To that end, the Contractor shall determine the method, details, and means of performing the work, but will comply with all legal requirements in doing so. Neither the City of Burlington nor its departments shall provide Contractor with specific instructions or training in how to provide the required services, except to the extent required by law or regulation. Contractor shall provide its own tools, materials or equipment. In providing services under this Agreement, CONTRACTOR shall perform in a manner consistent with that

degree of care and skill ordinarily exercised by members of the same profession currently practicing under similar circumstances at the same time and in the same or similar locality. The parties agree that neither CONTRACTOR nor its officers or employees are employees of the City of Burlington or any of its departments, agencies, or related entities. The parties also agree that neither CONTRACTOR nor its officers or employees is entitled to any employee benefits from the City of Burlington. CONTRACTOR understands and agrees that it and its officers and employees have no right to claim any benefits under the Burlington Employee Retirement System, City's worker's compensation benefits, health insurance, dental insurance, life insurance or any other employee benefit plan offered by City. CONTRACTOR agrees to execute any certifications to the best of its knowledge, information and belief, or other documents and provide any certificates of insurance required by City and understands that this contract is conditioned on its doing so, if requested.

CONTRACTOR understands and agrees that it is responsible for the payment of all taxes on the above sums and that the City of Burlington will not withhold or pay for Social Security, Medicare, or other taxes or benefits or be responsible for any unemployment benefits.

RESERVATION OF RIGHTS

It is the intent of the City to select the proposal that it deems to be in the best interests of the City. To that end, the City reserves the following rights:

1. To accept any proposal in whole or in part;
2. To accept multiple proposals if doing so is in the best interests of the City;
3. To reject any or all proposals in whole or in part;
4. To waive any informalities, omissions, or irregularities in any proposal;
5. To terminate and reissue this RFP for any reason;
6. To remedy any error in the RFP process without reissuing it; and/or
7. To change or negotiate any specifications in the City's sole discretion.

ATTACHMENT A

City of Burlington Asset Management Consulting Services

Understanding of RFP Procedures, Terms and Conditions

This page to be returned with qualifications submission

I acknowledge that I have read and understand all procedures and requirements of the above reference RFP and have complied fully with the general terms and conditions outlined in the RFP.

Consultant Team: _____

Representative's Printed Name: _____

Representative's Title: _____

Representative's Signature: _____

Date: _____