FILED

MAY 17 2024

JEANNIE GOFF

BILL NO.: 24-0501

ORDINANCE NO.: 24-

INTRODUCED BY: COUNCIL MEMBER (s) Grueteke

1	AN ORDINANCE AWARDING BIDS FOR CERTAIN PRODUCTS AND
2	SERVICES TO THE LOWEST AND BEST BIDDERS AS REFLECTED IN THE
3	RESPONSES TO CERTAIN INVITATIONS FOR BID AND REQUESTS FOR
4	PROPOSALS FOR GIS PARCEL MAPPING PROJECT 2024; AND
5	AUTHORIZATION FOR THE COUNTY EXECUTIVE TO EXECUTE ANY
6	NECESSARY AGREEMENTS OR CONTRACTS TO EFFECTUATE THE
7	AWARD OF THE BIDS AND PROPOSALS.
8	WHEREAS, Jefferson County, Missouri, (hereafter, the "County") in response to
9	certain Invitations for Bids and Requests for Proposals issued by the County, received bids
10	and proposals for the following items or services:
11	BID NAME
12	GIS Parcel Mapping Project 2024
13	NUMBER OF BIDS RECEIVED
14	2
15	DATE OF BID OPENING
16	3-26-24
17	WHEREAS, after reviewing the bids and proposals set forth above, the
18	Department of the County Assessor has determined that certain bids and proposals

1	represent the lowest and best bid for the respective items or services and met the bid or
2	proposal specifications issued by the County; and
3	WHEREAS, the Jefferson County, Missouri, Council finds it is in the best interest
4	of the County to award the bids and proposals to Surveying and Mapping, LLC, d/b/a SAM,
5	for a term from date of approval to 5-12-25 upon approval for up to \$398,850.00 per term,
6	for total amount not to exceed \$398,850.00 for the term, subject to budgetary
7	limitations.
8	BE IT ENACTED BY THE JEFFERSON COUNTY, MISSOURI, COUNCIL,
9	AS FOLLOWS:
10	Section 1. The County awards the following bids and proposals which are
11	incorporated by this reference as if fully set out herein, to the lowest and best vendor(s)
12	bidding for each respective item or service as follows:
13	BID NAME
14	GIS Parcel Mapping Project 2024
15	TERM
16	Date of approval to 5-13-25
17	AMOUNT
18	Up to \$398,850.00 per term,
19	for total amount not to exceed \$398,850.00 for the term,
20	subject to budgetary limitations
21	AWARDED BIDDER
22	Surveying and Mapping, LLC, d/b/a SAM

<u>Section 2.</u> The Jefferson County, Missouri, Council hereby authorizes the
 County Executive to execute the agreement attached hereto and incorporated herein by
 Reference as Exhibit "A" and any agreements or contracts necessary to effectuate the
 award of the bids and proposals set forth in this Ordinance. The County Executive is
 further authorized to take any and all actions necessary to carry out the intent of this
 Ordinance.

<u>Section 3.</u> Copies of all Invitations for Bid, Requests for Proposals, responses
thereto, and any contracts or agreements shall be maintained by the Department of the
County Clerk consistent with the rules and procedures for the maintenance and retention
of records as promulgated by the Secretary of State.

<u>Section 4.</u> This Ordinance shall be in full force and effect from and after its
 date of approval. If any part of this Ordinance is invalid for any reason, such invalidity
 shall not affect the remainder of this Ordinance.

[THIS SPACE LEFT INTENTIONALLY BLANK]

THIS BILL BEING DULY INTRODUCED, THE MEMBERS OF THE JEFFERSON COUNTY, MISSOURI, COUNCIL VOTED AS FOLLOWS:

Council Member District 1, Brian Haskins Council Member District 2, Gene F. Barbagallo Council Member District 3, Lori Arons Council Member District 4, Charles Groeteke Council Member District 5, Scott Seek Council Member District 6, Daniel Stallman Council Member District 7, Bob Tullock yes yes yes yes

FAILED

THE ABOVE BILL ON THIS 5 DAY OF , 2024:

PASSED

11

Charles Groeteke, County Council Chair

Cherlynn Boyer, Council Executive Assistant

THIS BILL WAS _____ APPROVED BY THE JEFFERSON COUNTY EXECUTIVE AND ENACTED AS AN ORDINANCE OF JEFFERSON COUNTY, MISSOURI, THIS _____ DAY OF _____, 2024.

THIS BILL WAS _____ VETOED AND RETURNED TO THE JEFFERSON COUNTY, MISSOURI, COUNCIL WITH WRITTEN OBJECTIONS BY THE JEFFERSON COUNTY EXECUTIVE, THIS _____ DAY OF _____, 2024.

Dennis J. Gannon, Jefferson County, Missouri, Executive

ATTEST:

Jeanine Goff, County Clerk

Kensk BY:

First Reading: 05-13-2024



Managed Geospatial Services™

RFP RESPONSE FOR: GIS Parcel Mapping Project 2024

SUBMITTED TO: Jefferson County, Missouri

March 26, 2024

ORIGINAL

SUBMITTED BY: SAM 501 North Market Street Maryville, MO 64468 660.562.0050 | info@sam.biz

Proposal Contact: Matt Sorensen 660.215.8970 Matt.Sorensen@sam.biz



SOI North Market Street | Maryville, MO 544E8 Ofc 660-562-0050 | gis@sam.biz | www.cim.biz

March 26, 2024



RE: GIS Parcel Mapping Project 2024

SAM respectfully submits the following proposal to Jefferson County, Missouri to provide GIS Parcel Mapping services. SAM's professional experience and working relationships with local governments across the country have established our firm as one of the most capable GIS firms in the nation.

SAM is ready to assist in your efforts to develop an accurate GIS program to better prepare the town for long-term success through. The following characteristics make SAM uniquely capable of overseeing this project for Jefferson County:

- SAM's project manager for this project, Matt Sorensen, has 30+ years of experience in project management, data conversion and remediation and GIS data re-construction projects. His leadership will ensure that Jefferson County's GIS project will be successfully completed on time and meet all requirements and expectations.
- SAM has provided consulting, GPS mapping and GIS services to over 500 clients across the country. Our dedicated field staff has GPS located and mapped millions of assets and integrated millions more seamlessly into a GIS program from tax map research data acquisition, CAD, and other third-party data systems.
- SAM's dedicated team for the Jefferson County project has a combined 96+ years of experience to ensure project
 efficiency and overall product quality. SAM is committed to providing the required resources to meet project
 schedules and the County's expectations. With the aid of SAM's deep bench of staff and cross-trained employees, our
 staff are well positioned to continue SAM's longstanding history of on-time project delivery.
- SAM has designed and implemented GIS datasets for counties and municipalities hundreds of times over for clients
 across the country this is not a new or special project for our firm. We take pride in our ability to scale deliverables
 and solutions that meet the resources and goals of every client. Our unique combination of Esri technologies and
 deliverables, cadastral mapping expertise, program design and unrivaled support are why more than 70% of our
 annual GIS revenue comes from repeat or referral clients.

Thank you for the chance to present our company for this opportunity. Our team of professionals has the experience and capabilities to make your GIS program a success. If you have any questions, please feel free to contact me directly at matt.sorensen@sam.biz or 660.215.8970.

Respectfully Submitted,

Matt Sorensen Director of GIS Operations

SAM – Leader in Managed Geospatial Services™

Delivering comprehensive GIS services for over 30 years, SAM has established a technical infrastructure and experience team to design, implement and support municipal and utility GIS programs across the country. SAM ensures that every client, regardless of size and resources, can implement an enterprise GIS program to manage everything from land parcels and transportation infrastructure to utility assets and work orders for all stakeholders by leveraging Esri technology in conjunction with industry applications for cities. We strive to stay cutting edge and diverse in our expertise so we can scale our services to projects of every size and need.

Every job, regardless of size and duration includes a level of consulting and personal service. GIS systems are unique in design, function and purpose. We have provided needs assessment and strategic plans for our mid-size and larger clients in order to establish a road map, funding justification and method of accountability for clients to change and grow with.

SAM's complete geospatial approach ensures we have the tools and skills to develop efficient and customized solutions for projects of any scale. This gives our clients the benefit of a single point of contact for a comprehensive set of GIS, surveying and mapping products. The size of our available workforce means we are able to use these tools effectively to accomplish even large-scale projects on accelerated schedules. With our focus on quality and timely delivery, we are proud to have a high rate of repeat business and positive client referrals.

The SAM GIS team understands that every solution we implement must improve the efficiency and accuracy of daily operations. This is why SAM is consistently hired based on qualifications and routinely recommended by our client base.

GIS Services

SAM specializes in geospatial services for GIS parcel reconstruction projects. With specialized teams of full-time, trained GIS technicians, utilizing cutting-edge Esri software, our staff is dedicated to accurately developing quality GIS data for our clients. Our geospatial services include:

- GPS Field Mapping
- Utility/Infrastructure Data Collection
- Asset Management Programs
- Utility Inspections
- GIS Data Development
- Data Conversion

- Consulting
- SL-RAT Sewer Acoustic Inspection
- GIS Mapping
- Custom Programming
- · Web-Based, Mobile GIS Programs
- Maintenance & Support

- Parcel Mapping
- Specialized Training
- 911 (NG911) GIS Services
- Vegetation Management

SAM Services



GIS/BIM

3D models for informed planning & decision making



Aerial Mapping High resolution remote sensing datasets



Geomatics

Supported by the industry's most advanced technology



Utility Inspection

Capture current state of existing assets



Transportation Inspection

Quality assurance & program management



Utility Engineering

Above ground & subsurface utility mapping



Statement of Qualifications | Jefferson County, Missouri

As a full-service professional GIS firm, SAM provides a solid geospatial foundation for all of our valued clients to ensure the integrity and longevity of their GIS program. With more than 20 years of demonstrated experience in developing and maintaining GIS data for local governments, SAM has the knowledge and technical expertise to provide all of the services desired by Jefferson County, MO for this project.



SAM is pleased to be an **Esri Silver Business Partner**, including the **ArcGIS System Ready Specialty** that recognizes SAM for staying current with Esri technology. Although we focus most of our GIS development, customization, and implementation efforts on Esri-based applications, we can easily handle data from, interface with, and deliver data to other GIS and CAD systems. SAM is also finalizing the processes for the **State and Local Government Specialty**, demonstrating SAM's expertise and experience in working with city, county and state governments.





ArcGIS System Ready



State and Local Government

SAM is an Esri Silver Business Partner and SAM's technical personnel have extensive experience with Esri's ArcGIS software, utilize state-of-the-art software and GPS collection equipment. Staff routinely take advantage of the latest training opportunities; all significant steps toward efficiency in data creation and development.





Jefferson County, Missouri | Specialized Experience

SAM By the Numbers

Our numbers speak for themselves! Here are the number of counties that we provide the following services: Parcel Maintenance **45** NG9-1-1 Clients 58

Countywide GIS Mapping **150+**

SAM Missouri GIS Clients

To further demonstrate our professional qualifications specific to this project, we have provided a map of our Missouri county GIS clients. Services to those clients include, but are not limited to: parcel construction / maintenance, 9-1-1 addressing maintenance, property change form, offline GIS, ag-land mapping, CAMA integration and sign inventory.

SAM GIS County Clients GIS Maintenance Clients

Adair County 📩 Andrew County Atchison County 📩 Audrain County 🌟 Barton County Bates County Benton County **Buchanan** County **Butler** County Caldwell County 👈 Callaway County Camden County Carroll County Carter County 📩 Jefferson County Chariton County Christian County Cole County Cooper County

Dade County Dallas County **Daviess** County DeKalb County 🌟 Douglas County Dunklin County 📥 Gentry County Greene County Grundy County 📩 Harrison County Henry County 🌟 Holt County 📩 Howard County Jefferson County Johnson County Laclede County 🚽 Lafayette County Lawrence County Lincoln County

Linn County 🌟 Livingston County 🌟 Macon County 🌟 Maries County Marion County McDonald County Miller County Mississippi County 🤺 Montgomery County Moniteau County 🌟 Morgan County New Madrid County Newton County Nodaway County 🤺 Oregon County 🔺 Osage County Ozark County Pettis County Phelps County

Polk County Pulaski County Putnam County **Ralls** County Ray County 📩 **Ripley County** Saline County 📩 Scott County Shelby County St. Clair County St. Francois County 🌟 Ste. Genevieve County Stone County Sullivan County Vernon County Warren County 🤰 Webster County Worth County



SAM's "client-focused" approach, and experience in project management has been the cornerstone of success for SAM in a market that does not expect, but rather demands a high level of service. Therefore, the proposed team members for this project have a unique combination of county mapping knowledge and experience in project management, GIS data development, parcel maintenance and quality control procedures. All project requirements and specifications will be met by the key personnel identified in this section.

PROJECT MANAGEMENT

SAM's experience and successful completion of countywide GIS projects across the Midwest proves that SAM understands the importance of information exchange and communication during the entire life of the project to reach a successful outcome. At the foundation of this approach is SAM' proactive management philosophy, which anticipates challenges, revolves around listening, and is committed to partnering. On every project, SAM utilizes a team approach and encourages open communication channels with the client and their stakeholders.

Matt Sorensen, your Project Manager, will oversee all aspects of this GIS parcel mapping project. Internal metrics and procedures are in place for projects of all sizes and complexities to ensure that project expectations are met and/or exceeded.



Matt Sorensen · Director of GIS Operations

Matt Sorensen has been with SAM since 2000 and prior to that, he served as a CAD Technician for Midland Engineering for 6 years. With more than 30 years of experience in project management, GIS data development, consulting and web-based GIS services, Mr. Sorensen has a unique blend of experience and understanding in providing valued clients with GIS solutions to apply to everyday, real world situations. As the Director of GIS Operations at SAM, Mr. Sorensen has served as project administrator and project manager for more than 120 projects including countywide GIS development, web-based and mobile GIS implementation and municipal and utility data collection projects throughout the country. Mr. Sorensen's professional qualifications and experience have established him as a leading management professional and developer of GIS and web GIS solutions for local governments.

In his current role as Director of GIS Operations, Mr. Sorensen is responsible for managing projects with services related to GIS development including administering cost controls and serves as contract administrator between SAM and clients. Mr. Sorensen has served in varying capacities in the multiple statewide organizations and has professional articles published.

EXPERIENCE

SAM: 24 years

Professional: 30 years

EDUCATION

B.S. Geography, NWMSU Maryville, MO

PROJECT MANAGEMENT

- 100+ County mapping & web GIS projects
- Coordinates resources and project schedules
- Administers cost controls
- Serves as contract administrator

CERTIFICATIONS

Pre-certified for TxDOT service category 1.9.1 GIS & Data Analysis #33662



Ryan Schieber • Sr. Project Manager

Ryan Schieber has more than 21 years of experience at SAM and provides a wide range of GIS development and maintenance services. As Sr. Project Manager, Ryan manages the geodatabase design, coordinates the data development of all projects, oversees quality control procedures and provides technical support to clients on a daily basis. He is trained in the latest ArcGIS software and applications and is fluent in numerous third-party programs to support seamless transition into developed GIS.

Ryan will use his vast experience in GIS data integration and development in overseeing the GIS program development portion of the project while assisting with any technical support issues. He regularly develops internal and external GIS standards for clients across local government, state and federal agencies, private entities, energy and utilities sectors. On a daily basis, Ryan oversees GIS programs across all phases in their lifecycle, and monitors server infrastructure - all to ensure that clients have accurate data and unrestricted

EXPERIENCE

- SAM: 21 years
 - Professional: 21 years

EDUCATION

B.S. Geography with GIS minor, NWMSU- Maryville, MO

TECHNICAL EXPERTISE

- Microsoft SQL Server
- Esri ArcGIS Enterprise, Online, Pro
- GeoServer
 Geocortex
 QGIS
- IT Technical Support
- Geodatabase design/maintenance
- Monitoring server infrastructure
- Develop/Maintain Python scripts

access to it. He is also responsible for keeping SAM at the forefront of GIS capabilities and technologies, continually researching the best tools and functionalities that enhance workflows and increase efficiencies, both internally at SAM and for clients.

Russ Wetzel · GIS Analyst

Russ Wetzel has 29 years of GIS experience and specializes in research acquisition, base map data development, NG9-1-1 mapping, geospatial analysis and cartography. Russ has developed base map layers for dozens of Countywide GIS projects, including many with complex riparian, railroad, and Government Land Grant boundaries. Russ currently manages ongoing GIS parcel maintenance for nine (9) counties and provides NG9-1-1 GIS maintenance to six (6) counties. He is the NG9-1-1 advisor to two (2) additional counties. His expertise is relied upon on all of these projects, and many more on-call / as-needed projects, to ensure staff and emergency responders can operate from the most complete and accurate data. His expertise will be crucial through all QA/QC processes to ensure a quality GIS deliverable.

Tony Wilmes • Sr. GIS Technician

Tony Wilmes has 16 years of experience in developing Countywide GIS programs and specializes in cadastral mapping, road centerline development and soil data development. As a Sr. GIS Technician, Tony performs data conversion and digitizing for countywide GIS projects on a daily basis. Tony's additional responsibilities include quality control, GIS data maintenance throughout project development, research, and interpretation of recorded survey plats and custom map development. Additionally, Tony is responsible for assisting with ongoing parcel maintenance for several counties to ensure staff operate from the most up-to-date GIS possible.

EXPERIENCE

- SAM: 22 years
 - Professional: 29 years

EDUCATION

B.S. Geography, NWMSU Maryville, MO

TECHNICAL EXPERTISE

- Esri's ArcGIS for Desktop & Server
- Research Data Acquisition
- 9-1-1 Address Mapping & Ranging
- Base Map Development
- Quality Control

EXPERIENCE

- SAM: 16 years
- Professional: 16 years

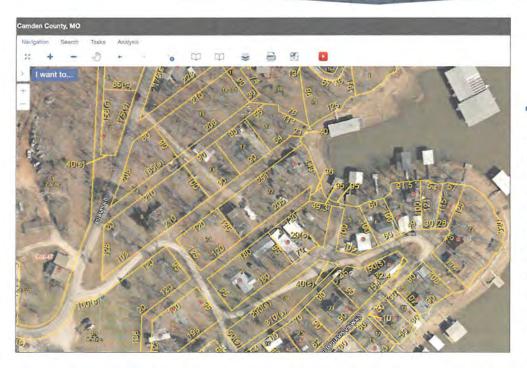
EDUCATION

B.S. Geography& GIS Minor, NWMSU- Maryville, MO

TECHNICAL EXPERTISE

- Esri's ArcGIS for Desktop
- Quality Control GIS Training
- GIS and IT Technical Support
- Research Acquisition

Camden County, MO 2014, 2020 - Ongoing



GIS DATA DEVELOPMENT & MAPPING WEB-BASED, MOBILE GIS & ASSET MANAGEMENT

Before selecting SAM to re-map their GIS program, Camden County, Missouri contracted with SAM in 2010 to develop and implement a web-based GIS site that would allow users to efficiently access and analyze their GIS data in a reliable, multi-user environment. Integrity™ was implemented in Camden County in 2010 and SAM continues to host the County's GIS website today.

Camden County had a growing

concern about the accuracy and maintenance of their GIS data and in June 2012, SAM was selected to re-map the County of approximately 67,800 parcels. GIS technicians compiled relevant research and existing GIS data to recompile the cadastral data into an accurate GIS program.

Key Services for This Project:

- GIS Development of 67,800 Parcels
- FEMA Flood Plain Layer
 - Lake Layer Complete with Lake Centerlines & Mile Marker Features
- ✓ Web-based Integrity[™] GIS Implementation

Project Contact Marty McGuire – Camden County Assessor 573-317-3820 • marty mcguire@camdenmo.org With Camden County's location and proximity to the Lake of the Ozarks, special data layers were developed in the GIS program, including a condominium point layer, Ameren UE shoreline management plan data, FEMA flood plain layer and a lake layer with lake centerlines and mile marker features.

SAM's map maintenance model in 2020 and ongoing annual parcel maintenance is a critical part of this project due to the large number of map changes throughout GIS development. SAM's staff of experienced GIS technicians complete map maintenance on a monthly basis and keep an open channel of communication with the Camden County Assessor's office to ensure accuracy and efficiency in parcel maintenance, map updates and overall GIS data development.

Barton County, MO Services provided from 2020 - 2023



GIS DATA DEVELOPMENT & MOBILE GIS & ASSET MANAGEMENT

As a nationwide geospatial firm, SAM's partnership with Barton County originally began with the acquisition and delivery of countywide 6-inch aerial photography in 2020.

In 2023, the county selected SAM based on qualifications to develop and implement a GIS mapping program for approximately 8,367 parcels. Additionally, SAM integrated data layers into the

GIS including Assessor office data, Missouri Department of Agriculture Land Survey Repository, Recorder's office data, MoDOT bridge and right-of-way data, parcel data complete with parcel dimensions, map index data, buildings on leased land data, and real estate database integration.

SAM utilized survey-based mapping protocols and obtained necessary survey research to develop the base map for the county's GIS program. SAM provided Barton County with a fully functional GIS program and a webbased GIS site that can be simultaneously utilized by login users from any computer and mobile device.

Key Services for This Project:

- GIS Mapping for 8,367 Parcels
- ✓ Local, State, Real Estate Data Integration
- Aerial Photography Acquisition
- ✓ Web-based SAM Integrity[™] GIS Implementation

Project Contact Rick Johnson – Barton County Assessor 417-682-3553 • assessor@countyofbarton.com



Henry County, MO February 2023 - Ongoing



GIS DATA DEVELOPMENT & MAPPING USB-BASED, MOBILE GIS & ASSET MANAGEMENT MANAGEMENT

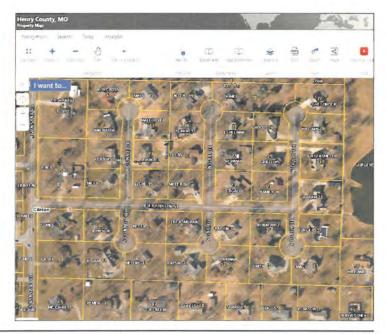
SAM's GIS Technicians has provided regular GIS maintenance services for a number of years to Henry County, but it became increasingly evident that a data reconstruction project was necessary in order for county staff to operate from the most accurate GIS database.

SAM was contracted by Henry County, Missouri in early 2023 to create a digital parcel mapping program for 16,533 parcels. In addition to developing all base map data layers within the GIS program, SAM also created a soil grade data layer, completed GIS parcel maintenance throughout the project, successfully installed the project, and provided on-site program training and on-going technical support.

With SAM Integrity, Henry County has the ability to effectively manage and maintain their GIS data through the web, while improving communication amongst various departments and recognizing daily efficiencies in everything from land records management to addressing questions and concerns from customers.

It's anticipated that SAM will complete the project late 2023.







Johnson County, MO Completed 2017



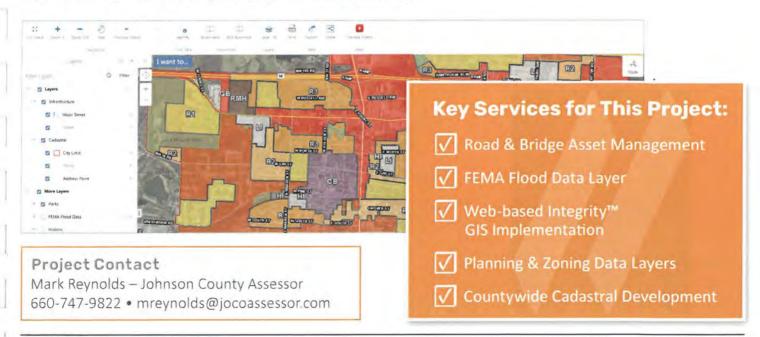


SAM was awarded a GIS data reconstruction and parcel mapping project in early 2015 from Johnson County, MO. This included additional data layers for County Road & Bridge, 911 data and municipal layers for the City of Warrensburg.

The project was completed in 2017 and SAM delivered a comprehensive web-based GIS that serves county departments in a multi-user environment that is robust, yet user-friendly. Road

& Bridge crews can edit and maintain department roads classifications, culverts and bridges to assist in asset management efforts. The Assessor's office has complete and accurate parcel data along with ongoing parcel maintenance done by SAM to ensure county departments are always working from the most accurate and up-to-date information. Johnson County administration have also allowed other local agencies access and editing capabilities in an enterprise environment.

The City of Warrensburg, the Johnson County seat, was also interested in having a web-based GIS to manage city Planning & Zoning data. Warrensburg had in-house GIS data for various municipal layers that SAM integrated into a web-based GIS program. These included various boundaries, park and recreation data, census and FEMA data, comprehensive plan information, parcel boundaries and zoning districts. These were set up for land use by the city. Today, SAM has scripts set up so that city and county changes are automatically updated in the GIS to ensure data integrity. The city and county operate from separate GIS sites, with secure login access and administrative control.





Warren County, MO

CAMA Provider: Vanguard Appraisals, Inc. • Completed Nov. 2006



GIS DATA DEVELOPMENT & MAPPING WEB-BASED, MOBILE GIS & ASSET MANAGEMENT WAINTENANCE & SUPPORT

SAM was selected by Warren County, Missouri in 2005 to develop and implement a GIS mapping program for approximately 22,683 parcels. Warren County had seen an explosion in growth in the years preceding their GIS development as a result from the westward push of suburban St. Louis. This rapid growth was a driving force in the County seeking a highly accurate and functional GIS program.

Although SAM encountered numerous challenges throughout project development, including numerous land grants, a unique Public Land Survey System (PLSS) and riparian boundaries along the Mississippi River, SAM completed the project in 12 months. SAM utilized survey-based mapping protocols and obtained necessary survey research to develop the base map for the County's GIS program. SAM provided Warren County with a fully functional GIS program, soil Ag valuation program, and a web-based GIS site. SAM is also contracted to perform all GIS maintenance operations for the County through Esri's ArcGIS Server technology.

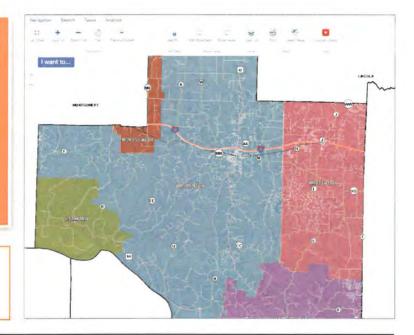
The County currently has SAM's Integrity™ web-based GIS solutions: https://warren.integritygis.com

Key Services for This Project: GIS Mapping for 22,683 Parcels

- ✓ Soil Ag Valuation Program
- ✓ PLSS Integration
- Web-based Integrity[™] GIS Implementation

Project Contact

Kathryn Smith – Warren County Assessor 636-456-8885 • ksmith@warrenCountymo.org





GIS Parcel Mapping Project 2024

PROJECT KICK-OFF MEETING

SAM will meet on-site with the Jefferson County Assessor's office to review specific project details and identify daily mapping workflow processes followed by the county. Any questions related to the GIS mapping project will be addressed at the kick-off meeting and all available mapping resources will be provided to SAM at this time. The Project Manager and one (1) GIS Specialist will be on-site for the kick-off meeting.



RESEARCH & DATA ACQUISITION

Directly after the kick-off meeting, SAM will work directly with the county to acquire all necessary research and data needed for the project.

The following data and research will be acquired from Jefferson County:

- Current copy of the county's SDE GIS database
- 2024 digital aerial photography
- Scanned copy of all mylar tax maps
- Current copy of Devnet database
- · County road right-of-way width data from Public Works Department
- Set up access to Recorder's Office online portal. (This will allow SAM to acquire the following survey research: General Land Office (GLO) plats, registered section corner documents, subdivision plats and survey plats)

GIS DATA LAYER DEVELOPMENT

The following data layers will be constructed and completed within their respective project areas and will be delivered to Jefferson County upon completion of that project area.

RECONSTRUCT ORIGINAL LOT DATA LAYER (FOR DEFINED PROJECT AREAS)

SAM will create a polygon-based original lot data layer within the GIS database. Recorded subdivision plats and survey plats obtained from the Jefferson County Recorder's office online portal will be the primary source of reference to create the original lot data layer. Additional sources of research to be used to construct the original lot layer will include the scanned tax maps and 2024 aerial photography. SAM will utilize coordinate geometry (COGO) methods within the Esri ArcGIS software to accurately map the original lot data layer into the GIS database. SAM will populate a lot number field within the GIS attribute table for labeling purposes within the county's GIS.

CONSTRUCT ORIGINAL BLOCK DATA LAYER (FOR DEFINED PROJECT AREAS)

SAM will create a polygon-based original block data layer within the GIS database. Scanned tax maps from the Assessor's office and recorded subdivision plats obtained from the Jefferson County Recorder's office online portal will be the primary source of reference to create the original block data layer. When original blocks need mapped into the GIS, SAM will select all of the original lots contained within the original block and copy the lot layer to the original block layer. This will ensure the original block layer lines up perfectly with the original lot layer. SAM will populate a block number field within the GIS attribute table for labeling purposes within the county's GIS.

CONSTRUCT SUBDIVISION DATA LAYER (FOR DEFINED PROJECT AREAS)

SAM will create a polygon-based subdivision layer within the GIS database. Scanned tax maps from the Assessor's office and recorded subdivision plats obtained from the Jefferson County Recorder's office online portal will be the primary source of reference to create the subdivision data layer. SAM will utilize coordinate geometry (COGO) methods within the Esri ArcGIS software to accurately map the subdivision boundary data layer into the GIS database. SAM will populate a subdivision name field within the GIS attribute table for labeling purposes within the county's GIS.

RECONSTRUCT PARCEL DATA LAYER (FOR DEFINED PROJECT AREAS)

SAM will utilize the county's scanned tax maps, 2024 aerial photography, Devnet CAMA database, subdivision plats and survey research to develop an accurate parcel data layer for approximately 33,379 parcels of real estate in Jefferson County. SAM will utilize Coordinate Geometry (COGO) methods to align the parcel boundaries to the base map whenever possible. For aliquot land descriptions, SAM will use the scanned tax maps, digital aerial photography and PLSS data layers as the primary reference source. SAM will populate the parcel ID number for each parcel in the GIS. All existing attribute data fields contained within the county's existing parcel data layer will be transferred over to the newly constructed parcel layer. Annotation for the parcel data layer will be labeled from the GIS attribute table.

SAM's skilled technicians use a special mapping protocol on every countywide GIS mapping project. GIS Specialists and Technicians have been trained to identify all available source documents for the data being created in the GIS. They employ a "land surveyor" approach to retracing cadastral data in the GIS development process and use relevant data in order of priority to accurately recompile the cadastral map data in a digital format.

SAM will conduct data research utilizing the following resources (in their respective order) for the reconstruction of Jefferson County's parcel data layer:

- · Recorded subdivision plats
- Subsequent surveys
- Scanned tax maps
- Devnet legal descriptions
- · Occupation line placement from aerial photography

Example of Accurately Mapped Parcel Data:





QUALITY ASSURANCE & COMMUNICATION

SAM has developed a culture that revolves around open communication with our clients. This has been the cornerstone of SAM since its inception more than 30 years ago and has been the driving force towards a long history of client success. Throughout the project, SAM will work with county staff as questions regarding specific items arise.

SAM maintains an open channel of dialog between project management and internal staff throughout the project. SAM's GIS and technical staff is in constant communication with the project manager, production manager and quality control manager. Internal project meetings are held on a regular basis to ensure the highest level of quality for the client and to discuss any issues specific to the project that need to be resolved or addressed.

TOPOLOGY RULES

SAM will utilize various topology rules to ensure spatial continuity throughout the completed GIS data layers. SAM uses the Esri geodatabase topology rules to verify edge matching, common boundaries, point duplication, connectivity, line quality, segmentation and point criteria. Digital topology checks will be performed on the completed data layers within the GIS program. This will confirm that no gaps, slivers, overshoots or undershoots are present within each dataset.

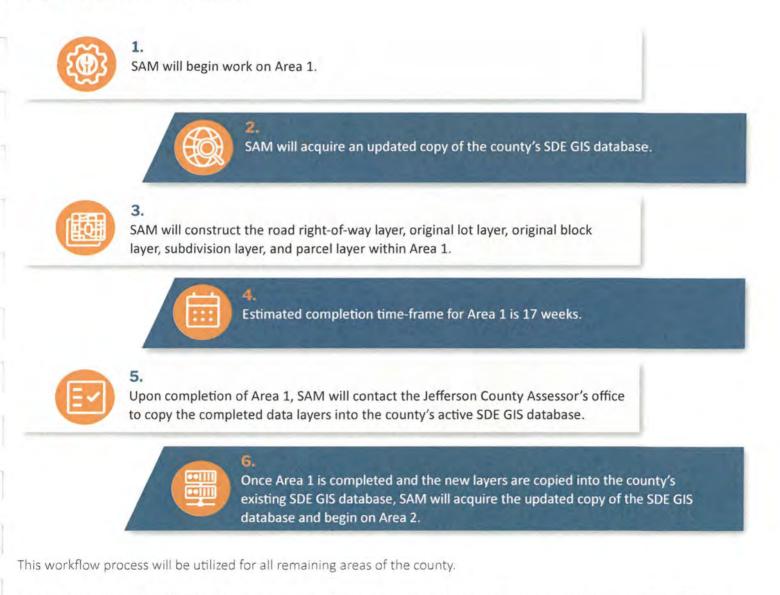
The following are some of the primary topology rules SAM enforces within the GIS:

- Parcel boundaries must not overlap
- Parcel boundaries must not contain gaps
- · Right-of-way boundaries must follow parcel boundary lines
- Original lot boundaries must follow parcel boundary lines
- Original Block boundaries must follow original lot boundaries

PROJECT WORKFLOW PROCESS

SAM is proposing a workflow process that will allow the Jefferson County Assessor's office to continue maintaining their GIS parcel mapping without a significant delay within each of the project areas. SAM proposes to divide the entire project into four separate segments. SAM will provide Jefferson County with a project area boundary layer that can be directly referenced within the county's GIS.

Project workflow process example:



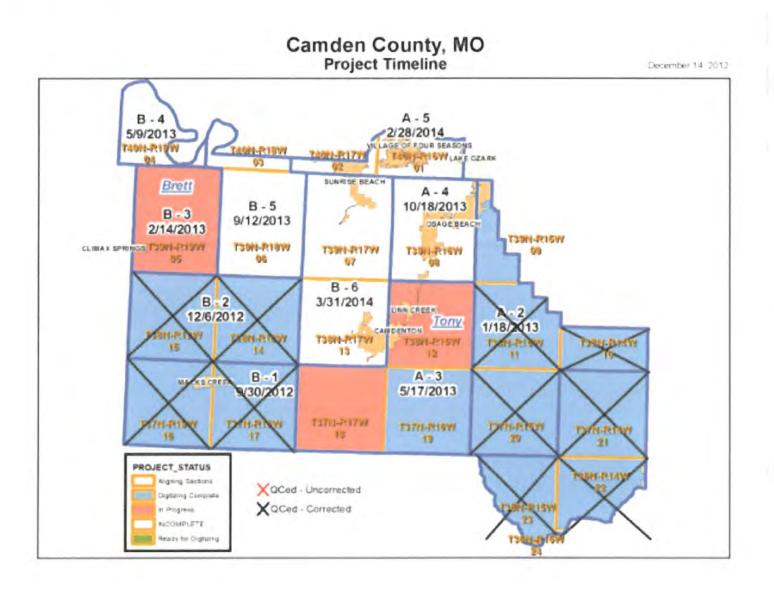
During the project, the Jefferson County Assessor's office will be able to perform all parcel maintenance within all the other areas of the county excluding the project area SAM is currently working on.



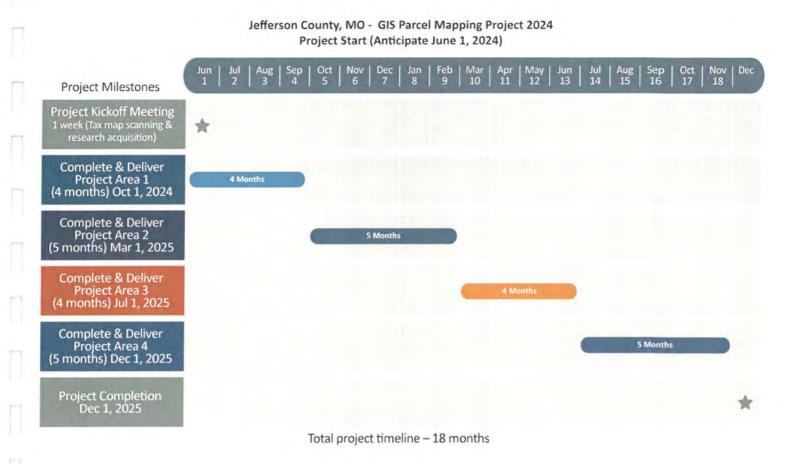
QUALITY CONTROL MAPS & PROJECT STATUS REPORT

SAM will compile quality control maps for specific mapping questions that arise during the project for review by the county. SAM will forward these questions to the county for clarification of the issues. Once clarification is received (via mail, email or phone conversation), appropriate corrective action is taken. These questions are kept in a project notebook for later review if required. SAM will issue a "Project Status Map" to the county on a monthly basis illustrating the progress completed.

Example of Project Status Report

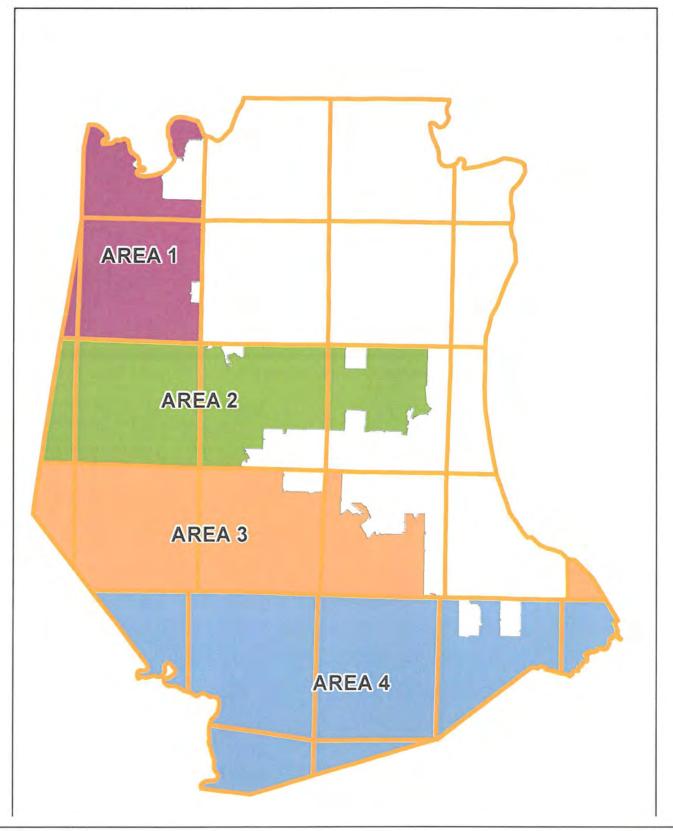


Jefferson County, Missouri | Project Approach



SA/

Jefferson Project Work Areas





SA/

AFFIDAVIT OF PERSONAL PROPERTY

STATE OF MISSOURI

)ss

)

Comes now <u>Matt Sorensen</u> (Name of Business Entity Authorized Representative) as <u>Director of</u> <u>GIS Operations</u> (Position/Title) first being duly sworn on my oath, affirm <u>Surveying And Mapping. LLC</u> (Business Entity Name / Applicant) does not own any real property in Jefferson County, Missouri.

Authorized Representative's Signature

Director of GIS Operations Title Printed Name 3/12/24

Matt Sorensen

Date

matt.sorensen@sam biz E-Mail Address

12-1 of March, 2024 Subscribed and sworn to before me this 1 am

commissioned as a notary public within the County of NODAWAY______, State of

MISSOURI , and my commission expires on May 14, 2027

it

Date

Signature of Notary

BRANDY PITTS Notary Public - Notary Seal STATE OF MISSOURI Nodaway County My Commission Expires: May 14, 2027 Commission # 23975044

SAM 501 North Market / Marvville, MO 64468 660-562-0050 Office

sam.biz



STATEMENT OF COMPLIANCE WITH THE MISSOURI DOMESTIC PRODUCTS PROCUREMENT ACT

The Missouri Domestic Products Procurement Act (34.350-34.359 RSMo) requires that for all bids with a value of \$25,000 or more, the goods or commodities purchased by any public agency (which definition includes all political subdivisions of the State, including counties) or used or supplied in the construction, alteration, repair, or maintenance of any public works must be manufactured or produced in the United States. As defined in 34.350 RSMo, United States means the United States of America, the District of Columbia, and all territories and possessions subject to the jurisdiction of the United States. The law also requires that the bidder must provide proof of compliance. Note: In general, if an import tariff is applied to an item, it does not qualify for the Buy American preference. In addition, Most Favored Nation status does not allow application of the preference.

All Products Are Manufactured or Produced In U.S.

I hereby certify that all products qualify as domestic, that the information provided is true and correct, and complies with all provisions of Sections 34.350-34.359 RSMo. I understand that any misrepresentation herein constitutes the commission of a class A misdemeanor pursuant to Section 34.355 of the Revised Statutes of Missouri.

Matt Sorensen

E-Mail Address

Authorized Representative's Signature

Director of GIS Operations Title

Surveying And Mapping, LLC Company Name Printed Name 03-06-2024 Date matt.sorensen@sam.biz



JEFFERSON COUNTY DEPARTMENT OF ADMINISTRATIVE SERVICE 729 MAPLE ST / PO BOX 100 HILLSBORO MO 63050 WWW.JEFFCOMO.ORG



BID #: 24-0016

EXHIBIT

Request for Proposal: GIS PARCEL MAPPING PROJECT 2024

Date Issued: 02/21/2024

ORDINANCE NO.

ENGAD 800-631

PROPOSALS SHALL BE ACCEPTED UNTIL: TUESDAY, MARCH 26, 2024, AT 2:00 P.M. LOCAL TIME.

Specification Contact:

BOB BOYER Jefferson County Assessor 636-797-5397 Bbover@jeffcomo.org

Contract Contact: JACKIE DOYLE Department of Administrative Services 636-797-5380

SAMPLE ENVELOPE

Mail (3) Three **Complete** Copies With Vendor And Proposal **Information As** Shown In Sample:

TEVDOR VANIE **TENDOR IDDRESS** CONTICT VEMBER DEPARTMENT OF THE COUNTY CLERK JEFFERSON COUNTY MISSOURI 729 MAPLE ST / PO BOX 100 HILLSBORO MO 63050-0100

SEALED PROPOSAL: (PROPOSAL V.111E)

Contract Term: ONE YEAR CONTRACT WITH ONE (1) ADDITIONAL ONE YEAR **RENEWAL OPTION** UPON APPROVAL OF THE COUNTY COUNCIL AND COUNTY EXECUTIVE

The undersigned certifies that he/she has the authority to bind this company in an agreement/contract to supply the commodity or service in accordance with all terms, conditions, and pricing specified. This Proposal, if accepted, will constitute an Agreement and Contract with Jefferson County, Missouri, upon approval of the County Council and County Executive. Prices are firm during this agreement term, unless agreed upon in writing by the County. The County has the option to renew this agreement at the same terms and conditions as the original agreement for one (1) additional one-year term with the written consent of the successful bidder. Price increases for renewals are not authorized unless approved in writing by the County.

	Surveying And Mapping, LLC	Matt Sore	nsen
	Company Name 501 North Market Street	Auth	orized Agent (Print)
Vendor Information:	Address Maryville, MO 64468	Signature Director of GIS Operations	
	City/State/Zip Code 660-215-8970	03-06-24	Title 74-2704974
02-2024	Telephone # matt.sorensen@sam.biz	Date 512-3	Tax ID #
512-326-3029	E-mail		Fax #

3-02-2024

Bidders Initials

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Specifications	Page 12

REQUIRED DOCUMENTS

1. Current and valid Certificate of Insurance or binder showing required insurance coverage must be provided with each bid.

(County must be added as additional insured if awarded)

2a. Proof that Bidder does not owe delinquent real or personal property in Jefferson County (tax receipts for past 3 years)

Obtain receipts at http://jeffersonmo.devnetwedge.com

Or

2b. A notarized affidavit, on company letterhead stating that the applicant does not own any real or personal property in Jefferson County, Missouri.

- 3. A Notarized affidavit of work authorization and current business entity status with E-verification documentation (pages 9 & 10).
- Agreement to be executed by the County upon approval by the County Council and County Executive (Bidder is required to complete company information and execute signature).
- 5. Cooperative Bid Form (last page)
- 6. All pages of the Invitation for Bid/Request for Proposal must be used when submitting your bid/proposal response along with initialing each page with the bid/proposal. Additional information may be included separately.
- 7. Bid deposits/bonds must be in the exact amount as stipulated in the bid. (if required)

*BIDS MAY BE REJECTED IF REQUIRED DOCUMENTATION IS NOT INCLUDED OR COMPLETED AT DISCRETION OF THE COUNTY



PROPOSAL REQUIREMENTS

Bidder shall initial all pages and return where the Bid Document denotes

"BIDDER"S INITIALS: M5 "

DEFINITIONS:

- 1. The term "County" means the Jefferson County, Missouri and its designated representatives.
- 2. The term "Vendor" means Supplier, Contractor, and Seller and includes designated representatives.
- 3. The term "RFP" means Request for Proposal.
- 4. The term "Agreement/Contract means Binding Agreement, Contract, Request for Purchase, Order.

PROPOSAL SUBMISSION:

Submit bid form in original (one original) and two (two copies) with all specification pages, if applicable. No facsimile or electronic proposals shall be accepted and shall be rejected. A fully executed Affidavit is required by Section 285.530 RSMo., and shall be submitted with the proposal form. A copy of the Affidavit is attached hereto. Failure to execute the Affidavit shall result in the proposal being rejected. Vendor shall comply with the requirements of Sections 285.525 to 285.555 of the Revised Statutes of the State of Missouri. If any part of the work is subcontracted, each subcontractor shall comply with the same requirements of this specification. No contractor shall knowingly employ, hire for employment, or continue to employ an unauthorized alien to perform work within the State of Missouri. Vendor and any of its subcontractors, shall, by sworn affidavit and provision of documentation, affirm their enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services. Vendor and its subcontractors shall also sign an affidavit affirming that they do not knowingly employ any person who is an unauthorized alien.

Prevailing Wage Vendor and its subcontractors shall pay not less than the prevailing hourly rates of wages, as determined by the Labor and Industrial Relations Commission of Missouri. Vendor shall abide by the most current Annual Wage Order published by the Missouri Department of Labor and Industrial Relations or other similar resources and publications. Failure to comply with any provision, provide any required documentation, insurance forms or deposits or bonds in exact amounts or any other term or condition that is not in strict conformance shall result in the bid being rejected.

C. BASIS OF PROPOSAL AWARD:

Award may be made on an item-by-item basis to the lowest and best proposals or award may be made to the lowest and best proposal total, whichever is in the best interest of the County. County may reject any or all proposals for any reason and may waive any informality. Proposals submitted from a Missouri State Contract shall include a copy of the State Contract with the proposal.

It is further agreed that the Contract shall not be valid and binding upon the County until approved by the County Counselor, as to legal form and is subject to the Ordinances. Resolutions and Orders of Jefferson County, Missouri, and State and Federal Law. If no proposal or proposals have been awarded by the County Council within forty-five (45) days following the opening of the proposal then all proposals will be deemed rejected.

PROPOSAL PREPARATION:

- 1. Vendors are responsible for examination of drawings, specifications, schedules and instructions.
- Each Vendor shall furnish the information required by the invitation. The vendor shall sign all required documents. All
 deletions and erasures shall be initialed
- 3. Alternate proposals for supplies or services other than specified shall not be considered unless authorized by invitation.
- Vendor shall state a definite time for delivery of goods or for performance of services unless otherwise specified in the Request for Proposal.
- 5. When specified, samples must be timely submitted and at no expense to the County.
- 6. Failure to adhere to all requirements may result in the response being disqualified as non-responsive.

. MODIFICATION OR WITHDRAWAL OF PROPOSALS:

Proposals may be modified or withdrawn prior to the exact hour and date specified for receipt of proposals, provided the modification or withdrawal is in writing and is delivered in the same manner as a proposal submission.

F. LATE PROPOSALS:

It is the responsibility of the vendor to deliver his proposal or proposal modification on or before the date and time of the proposal closing to the Department of the County Clerk of Jefferson County. Proposals received late will be rejected and returned unopened to the vendor.

G. BID DEPOSITS/BONDS:

Bid Deposits/Bonds are not required unless specified in the specifications. Bid deposits/Bonds must be in the exact amount as stipulated in the bid.

Bidders Initials_MS

H. MATERIAL AVAILABILITY:

Vendors must accept responsibility for verification of material availability, product schedules and other pertinent data prior to submission of proposal and delivery time. It is the responsibility of the vendor to notify the County immediately if the materials specified are discontinued, replaced, or not available for an extended period of time. All materials ordered by the County, shall be as needed. A sample of materials may be requested.

I. ALTERNATE PROPOSALS:

Where required, vendors must submit complete specifications on all alternate proposals with the proposal form. Alternate proposals without complete specifications may be rejected. Alternate proposals and exceptions to proposal clauses must be clearly noted on the proposal form. The County may accept or reject alternate proposals; whatever is most advantageous to the County.

J. INCORPORATION OF DOCUMENTS:

The terms of the proposal invitation, proposal specifications, proposal form are and shall be incorporated into the contract as if fully setout therein. The Proposal, if accepted and approved by the County Council and County Executive shall constitute the terms of a Contract or Agreement with Jefferson County, Missouri, subject to any further Amendments. Memoranda or other documents or specifications which must be set forth in writing and signed by all parties.

K. ADDENDA:

Addenda to proposal specifications are incorporated by reference as if fully setout herein. It is the responsibility of the vendor to insure and verify that they are in receipt of and completed all attached addenda's prior to submission of proposal forms. Verification is made by contacting the Department of Administrative Services or by reviewing the County Web Site. (www.jeffcomo.org).

L. INSURANCE:

The Vendor Contractor shall purchase and maintain insurance with an insurance company licensed to do business in the State of Missouri or in the state where the vendor is incorporated or otherwise licensed to do business and which shall remain, at all times during the term of any contract with the County, in full force and effect. Preference will be given to a Vendor/Contractor who provides insurance with an insurance company licensed to do business in the State of Missouri, but in any event said Vendor/Contractor shall provide said insurance at it's own expense. Such insurance shall be provided as will protect the Vendor/Contractor from claims which may arise out of or result from the Vendor/Contractor's execution of the work, whether such execution be by himself, his employees, agents, or by anyone for whose acts any of them may be liable. If any such work covered by the Contract is to be performed on County owned or leased premises, the Vendor agrees to carry liability and workman's compensation insurance, satisfactory to the County, and to indemnify the County against all liability. loss, and damage arising out of any injuries to persons and property caused by the Vendor, his sub-contractors, employees or agents. The insurance coverage shall be such as to fully protect the County and the general public from any and all claims for injury and damage resulting by any actions on the part of the Vendor/Contractor or its' forces as enumerated above. All policies must name the County as an additional insurance amounts, liability, coverage, lapse or otherwise shall be litigated in the Circuit Court of Jefferson County, Missouri and the same shall be incorporated into any Contract agreed to by the parties.

THE COUNTY REQUIRES A CURRENT AND VALID CERTIFICATE OF INSURANCE OR BINDER SHOWING REQUIRED INSURANCE COVERAGE MUST BE PROVIDED WITH EACH BID, JEFFERSON COUNTY MUST BE ADDED AS AN ADDITIONAL INSURED AFTER AWARD OF THE BID. ANY LAPSE IN INSURANCE COVERAGE OR CANCELLATION THEREOF BY THE CONTRACTOR OR SUB-CONTRACTORS DURING THE TERMS OF THE CONTRACT SHALL IMMEDIATELY BE DEEMED A MATERIAL BREACH UNDER THE TERMS OF ANY CONTRACT.

A. (X)Required () Not Required Comprehensive General Liability Insurance

The Vendor/Contractor shall maintain and keep in full force and effect during the terms of this Contract such comprehensive general liability insurance as shall protect them from claims which may arise from operations under this Contract, whether such operations be by themselves or by anyone directly or indirectly employed by them. The amounts of insurance shall be not less than \$1,000,000,000 combined single limit for any one occurrence covering both bodily injury and property damage, including accidental death.

B: (X)Required () Not Required Professional Liability Insurance

The Vendor/Contractor shall provide the County with proof of Professional Liability Insurance, which shall protect the County against any and all claims, which might arise as a result of the operation of the Vendor/Contractor in fulfilling the terms of this Contract during the life of the Contract. The minimum amounts of such insurance will be \$1,000,000.00. Should any work be subcontracted, these limits will also apply.

C. (X)Required () Not Required Worker's Compensation Insurance: per Missouri Revised Statutes Chapter 287 The Vendor/Contractor or his sub-contractor or contractors, shall maintain and keep in force of this Contract such worker's compensation insurance limits as required by the statues of the State of Missouri and Employer's Liability with limits no less than \$500,000,00.

M. PROPOSAL OPENINGS:

Proposals will be publicly opened and read aloud at the time indicated on page 1. The vendors and the public are invited but not required to attend the formal opening of the proposals. No decisions relating to the award of a contract or agreement will be made at the opening.

PROPOSAL TABULATIONS:

Proposal Tabulations will be available 5 to 7 business days following the proposal opening. Proposal submissions are open for public review at the time of the proposal opening. Proposal tabulations are posted on the County's web-site address. www.jeffcomo.org, under the services tab, Invitation for Bid/Request for Proposal link. NO COPIES of proposal tabulations are sent to vendors.

PROPOSAL FORM AND CONTRACT

A. PROPOSAL REPRESENTATIONS:

The vendor, by executing the proposal form certifies that:

- 1. The proposal complies with Request for Proposal, Form and Proposal Specifications.
- 2. The vendor is not debarred or suspended from participation in Federal Assistance programs.

TAXES:

R.

No bid or proposal shall be awarded by Jefferson County unless the prospective bidder provides proof that the bidder does not owe delinquent real or personal property taxes to Jefferson County. The prospective bidder may be required to provide proof in the form of an original paid tax receipt issued by the Jefferson County Collector or a verified affidavit stating that the applicant does not own any real or personal property in Jefferson County. Tax receipts for the past 3 years are required and may be obtained at http://jeffersonmo.devnetwedge.com/ or a notarized affidavit stating that the applicant does not own any real or personal property in Jefferson County stating that the applicant does not own any real or personal property in Jefferson County affidavit stating that the applicant does not own any real or personal property in Jefferson County affidavit stating that the applicant does not own any real or personal property in Jefferson County affidavit stating that the applicant does not own any real or personal property in Jefferson County affidavit stating that the applicant does not own any real or personal property in Jefferson County on company letterhead.

Section 135.040 of the Jefferson County Code of Ordinances (Ord. No. 10-0411) requires that no bid or proposal shall be awarded by Jefferson County unless the prospective bidder provides proof that the bidder does not owe delinquent real or personal property, or that the bidder does not own any real or personal property in Jefferson County. All delinquent real or personal property taxes shall be paid, in-full, prior to the award of any bid, or proof shall be provided that the bidder does not own any real or personal property in Jefferson County prior to the award of any bid. Jefferson County considers that the failure to pay any and all real or personal property taxes due Jefferson County, Missouri, the failure to report all real or personal property owned, held or used in Jefferson County, the failure to provide proof thereof, and/or the failure to keep said tax bills current shall be deemed a material breach of the contract and will subject the contract to immediate cancellation. All taxes, due and owing, must be paid in full at the time the bid is awarded by Jefferson County and remain paid during the entire term of the contract unless the prospective bidder provides proof that the bidder does not own real or personal property in Jefferson County. This requirement shall not apply to the award of bids for projects which are funded in whole or in part by Federal funds.

CERTIFICATION OF INDEPENDENT PRICE DETERMINATION:

- The prices in the proposal shall be independently determined, without consultation, communication, or agreement for the purpose of restricting competition as to any matter relating to price with any Vendor or other person.
- 2. Unless otherwise required by law, the prices shall not have been knowingly disclosed by the Vendor prior to opening; or
- No attempt has been made or will be made by the vendor to induce any other person or firm to submit or not to submit a proposal.

PRICE:

E.

The price(s) specified in this proposal shall be firm and not subject to contingency or reservation. The vendor represents prices specified in the proposal do not exceed current selling price for the same or substantially similar good or service, and are the same as or lower than other prices charged to the vendor's most favored customer. In the event the stated prices are determined to be higher than the prices for which Supplier has sold the items, or services, to others, this contract price shall be reduced accordingly. Proposal prices are ALL INCLUSIVE: (Shipping, Handling, Delivery, and Assembly to locations specified by the County). Prices shall be firm for ALL County departments and locations for term of the agreement.

MISSOURI DOMESTIC PRODUCT PROCUREMENT ACT:

Vendor represents that the goods provided comply with Sections 34.350 to 34.359, RSMo., known as the Domestic Product Procurement Act. The act encourages the purchase of products manufactured or produced in the United States, State of Missouri, and Jefferson County, Missouri. Vendor shall include proof of compliance with the Act with the proposal.

F. NON-EXCLUSIVE AGREEMENT:

The contractor shall understand and agree that the contract shall not be construed as an exclusive agreement and further agrees that the County may secure identical and/or similar services or products from other sources at anytime in conjunction with or in replacement of the contractor's services.

H. INSPECTION, ACCEPTANCE AND APPROVALS:

Goods shall at all times and places, including the period of manufacture, are subject to inspection and test by County. County will accept or give notice of rejection of goods delivered within a reasonable time after receipt. Acceptance shall not waive any warranty. All goods supplied are subject to final inspection and acceptance by County notwithstanding payment, prior inspections or approvals. County may require prompt replacement or correction of rejected goods at Supplier's expense, including a reduction in price for rejected goods. Supplier shall not resubmit rejected goods to County without prior written approval and instructions from County. In addition, Supplier shall identify resubmitted goods as previously rejected. Supplier shall provide and maintain a quality assurance and control system acceptable to County.

I. WARRANTY:

Unless otherwise agreed to in writing by the parties, Supplier warrants that items ordered to specifications will conform thereto and to any drawings, samples or other descriptions furnished or adopted by County, or, if not ordered to specifications will be fit and sufficient for the purpose intended, and that all items will be new, merchantable, of good material and workmanship, and free from defect. Such warranties, together with Supplier's service warranties and guarantees, if any, shall survive inspection, test, acceptance of, and payment for the items and shall run to County and its assigns. Except for latent defects, the County shall give notice of any nonconformity to the Supplier within one (1) year after acceptance. County may return for credit or require prompt correction or replacement of the defective or non-conforming goods or have the defective good corrected or replaced at Supplier's expense. Return to Supplier of any defective or non-conforming goods and delivery to County of any corrected or replaced goods shall be at Supplier's expense. Defective or non-conforming items shall not be corrected or replaced without written authorization by County. Goods required to be corrected or replaced shall be subject to the provisions of this clause and the clause hereof entitled "Inspection. Acceptance and Approvals" in the same manner and to the same extent as goods originally delivered under this contract.

J. PAYMENT:

County will pay Supplier for goods upon delivery to, submission of certified invoices and acceptance. The County will not be responsible for articles or services furnished without a purchase order. Price is tax-exempt.

K. CHANGE ORDER:

County may make changes within the general scope of this contract. If any such changes cause an increase or decrease in the cost of or the time required for the performance of any part of the work, whether changed or not changed by any such order, an equitable adjustment shall be made in the price or delivery schedule or both, and any change order shall be in writing. Any claim by a Supplier for adjustment under this clause shall be asserted within fifteen (15) days from the date of receipt of this written order directing the change, provided, however, County, if it decides that the facts justify such action, may receive and act upon such claim asserted at any time prior to final payment.

L. DELIVERIES:

Deliveries shall be made in strict accordance with any delivery schedule contained in the proposal specification or contract and in the exact quantity ordered. Failure to adhere to delivery schedule is reason for termination in accordance with the "termination" clause. Deliveries are to be made at locations specified by the County at time of Order.

M. RESPONSIBILITY FOR SUPPLIES:

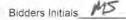
Pursuant to Section 290.560 RSMo., Supplier Contractor shall employ only Missouri laborers and laborers from nonrestrictive states except that other laborers may be used when Missouri laborers or laborers from nonrestrictive states are not available, or are lineapable of performing the particular type of work involved, if so certified by the contractor and approved by the County. Except as otherwise provided, Supplier shall be responsible and bear all risks for loss and damage to goods until delivery at County's facilities, regardless of F.O.B. point, point of inspection or acceptance: and if the goods are rejected.

N. SUBCONTRACTS:

Supplier shall not enter into any subcontract(s) in excess of \$25,000 or 20% of this contract price: whichever is less, for any goods without County's prior written approval.

O. CHOICE OF LAW:

This proposal and contract shall be governed and interpreted according to the laws of the State of Missouri. Venue for any court action shall be in Jefferson County. Missouri.



TERMINATION:

Ρ.

1. General: Performance of work may be terminated by the County in whole, or from time to time in part, whenever County shall determine that such termination is in the best interests of County. Termination shall be affected by delivery to Supplier of a Notice of Termination specifying the extent to which performance of work is terminated and the date upon which such termination becomes effective. If such notice does not state termination is pursuant to subparagraph 2, 3, or 4 of this paragraph, County shall have the right to so indicate within thirty (30) days. If no notice is delivered within the thirty (30) day period, or such longer periods as is mutually agreed to by the parties, the original Notice of Termination shall be deemed to be issued pursuant to subparagraph 1 of this paragraph.

Bankruptcy or Insolvency: In the event bankruptcy proceedings are commenced by or against Supplier or under any
provisions of the United States Bankruptcy Act or for the appointment of a receiver or trustee or a general assignment for the
benefit of creditors of either party, County shall be entitled to terminate without further cost or liability.

- 3. Section 135.040 of the Jefferson County Code of Ordinances (Ord. No. 10-0411) requires that no bid or proposal shall be awarded by Jefferson County unless the prospective bidder provides proof that the bidder does not owe delinquent real or personal property, or that the bidder does not own any real or personal property in Jefferson County. All delinquent real or personal property taxes shall be paid, in-full, prior to the award of any bid, or proof shall be provided that the bidder does not own any real or personal property in Jefferson County prior to the award of any bid. Jefferson County considers that the failure to pay any and all real or personal property taxes due Jefferson County, Missouri, the failure to report all real or personal property owned, held or used in Jefferson County, the failure to provide proof thereof, and/or the failure to keep said tax bills current shall be deemed a material breach of the contract and will subject the contract to immediate cancellation. All taxes, due and owing, must be paid in full at the time the bid is awarded by Jefferson County and remain paid during the entire term of the contract unless the prospective bidder provides proof that the bidder does not own real or personal property in Jefferson County. This requirement shall not apply to the award of bids for projects which are funded in whole or in part by Federal funds.
 - 4. Default: County may terminate the whole Contract or any part in either of the following circumstances:
 - a. If supplier fails to deliver the items required by the contract within the time specified; or
 - b. If supplier fails to perform any of the other provisions of the contract, or so fails to make progress as to endanger performance of the contract in accordance with its terms, and in either of these two circumstances does not cure such failure within a period of ten (10) days after notice from County specifying such failure. In the event of termination under subparagraph 1, County shall have the right to procure, on such terms and in such manner as it may deem appropriate, items similar to those terminated, and to recover from Supplier the excess cost for such similar items provided, however, Supplier shall not be liable for such excess costs where the failure upon which the termination is based has arisen out of causes beyond the control of Supplier and without the fault or negligence of Supplier. Such causes shall be deemed to include fires, floods, earthquakes, strikes, and acts of the public enemy. The rights of County provided in subparagraph 1 shall be in addition to any other rights provided by law or the contract.
 - c. In the event of the Supplier's non-compliance with the provisions as set forth. This Contract may be cancelled, terminated or suspended in whole or in part and the supplier may be declared ineligible for further County contracts. The rights and remedies of the County provided in this paragraph shall not be exclusive but are in addition to any remedies provided in this Contract or as provided for by law.

Q. NOTICE AND SERVICE THEREOF:

Any notice from the County shall be in writing and considered delivered and the service thereof completed when said notice is posted, by certified or regular mail, to the Supplier, at the address stated on the proposal form.

R. CONTRACT TERM:

Performance shall be governed solely by the terms and conditions as set forth in the Request for Proposal. Proposal Specifications, Proposal Form and the Contract notwithstanding any language contained on any invoice, shipping order, bill of lading or other document furnished the Seller at any time and the acceptance by the County for any goods furnished.

6. COMPLIANCE WITH APPLICABLE LAWS:

Supplier warrants it has complied with all applicable laws, rules and ordinances of the United States, Missouri or any other Governmental authority or agency in the manufacture or sale of the goods, including but not limited to all provisions of the Fair Labor Standards Act of 1938, as amended.

ACTS OF GOD:

No party shall be liable for delays, nor defaults due to Acts of God or the public enemy, riots, strikes, fires, explosions, accidents, governmental actions of any kind or any other causes of a similar character beyond its control and without its fault or negligence.

SELLER'S INVOICES:

Invoices shall contain the following information. Contract number (if any), Purchase Order Number. Item number, contract description of goods or services, sizes, quantities, unit prices and extended totals. Invoices for and inquiries regarding payment should be addressed to the County Accounts Payable Clerk.



V. APPROVAL:

It is agreed the acceptance of a proposal shall not be valid and binding upon the County until approved by the County Purchasing Agent, County Council and County Counselor.

W. INDIVIDUAL, PARTNERSHIPS, CORPORATIONS:

Indicate: [] Individual: [] Partnership: [X] Corporation.

Incorporated in the State of Texas

X. LITIGATION:

This agreement shall be interpreted under the laws of the State of Missouri. Any disagreements, questions, controversies, litigation or other causes of action whatsoever arising from or under the terms of this agreement shall be resolved in the trial courts of 23rd Judicial Circuit Court of the State of Missouri-Hillsboro, Missouri.

Y. LANGUAGE: Bids and all related documents will only be accepted in the English Language.

THE INVITATION FOR BID / REQUEST FOR PROPOSAL NOTICES ARE POSTED ON THE JEFFERSON COUNTY, MISSOURI WEBSITE AT <u>WWW.JEFFCOMO.ORG</u> LOCATED UNDER THE SERVICES TAB, INVITATION FOR BID / REQUEST FOR PROPOSAL LINK.

SPECIFICATION CONTACT

JEFFERSON COUNTY ASSESSOR'S OFFICE BOB BOYER (636) 797-5397

SANDRA KOST (636) 797-5041

AFFIDAVIT OF WORK AUTHORIZATION

The grantee, sub grantee, contractor or subcontractor who meets the section 285.525, RSMo., definition of a business entity must complete and return the following Affidavit of Work Authorization.

 Comes now
 Matt Sorensen
 (Name of Business Entity Authorized Representative) as

 Director of GIS Operations
 (Position/Title) first being duly sworn on my oath, affirm

 Surveying And Mapping, LLC
 (Business Entity Name) is enrolled and will continue to participate in the

 E-Verify federal work authorization program with respect to employees hired after enrollment in the program who are proposed to work in connection with the services related to GIS Parcel Mapping Project 2024

 (Bid/Grant/Subgrant/Contract/Subcontract) for the duration of the grant, subgrant, contractor, or subcontractor, if awarded in accordance with subsection 2 of section 285.530, RSMo., I also affirm that

 Surveying And Mapping, LLC
 (Business Entity Name) does not and will not knowingly employ a person

 who is an unauthorized alien in connection with the contracted services related to
 Gis Parcel Mapping Project 2024

 (Bid/Grant/Subgrant/Contract) for the duration of the grant, subgrant, contractor, or subcontractor, if awarded in accordance with subsection 2 of section 285.530, RSMo., I also affirm that

 Surveying And Mapping, LLC
 (Business Entity Name) does not and will not knowingly employ a person

 who is an unauthorized alien in connection with the contracted services related to
 (Bid/Grant/Subgrant/Contract/Subcontract) for the duration of

the grant, subgrant, contract, or subcontract, if awarded.

In Affirmation thereof, the facts stated above are true and correct. (The undersigned understands that false statements made in this filing are subject to the penalties provided under section 575.040, RSMo.)

Mato S	Matt Sc	prensen	
Authorized Representative's Signature	Printed N	Vame	
Director of GIS Operations	3/12/24		
Fitle	Date		
Subscribed and sworn to before me this _	12th (DAY)	of MWCM, 2024. I am (MONTH, YEAR)	
ommissioned as a notary public within th	e County of()	DOUNTY, State of	
MISSOURI , and my (NAME OF STATE)	() commission exp	A ME ward	
(NAME OF STATE)		(DALL)	
Brancy Ritts	3/12/24		
Brangy Pitts	<u>3/12/2</u> Date		

AFFIDAVIT OF WORK AUTHORIZATION

(Continued)

CURRENT BUSINESS ENTITY STATUS

I certify that <u>Surveying And Mapping, LLC</u> (Business Entity Name) <u>MEETS</u> the definition of a business entity as defined in section 285.525, RSMo., pertaining to section 285.530, RSMo., as stated above.

Matt Sorensen Authorized Business Entity Representative's Name (Please Print)

Authorized Business Entity Representative's Signature

Surveying And Mapping, LLC Business Entity Name 03-06-2024 Date

As a business entity, the grantee, sub grantee, contractor, or subcontractor must perform/provide the following. The grantee, sub grantee, contractor, or subcontractor shall check each to verify completion/submission:

 Enroll and participate in the E-Verify federal work authorization program (Website: <u>http://www.dhs.gov/e-verify</u>; Phone: 888-464-4218; Email: <u>e-verify(a dhs.gov</u>) with respect to the employees hired after enrollment in the program who are proposed to work in connection with the services required herein;

AND

Provide documentation affirming said company 's/individual's enrollment and participation in the E-Verify federal work authorization program. Documentation shall include a page from the E-Verify Memorandum of Understanding (MOU) listing the grantee's, subgrantee's, contractor's, or subcontractor's name and the MOU signature page completed and signed, at minimum, by the grantee. subgrantee, contractor, or subcontractor and the Department of Homeland Security – Verification Division: (if the signature page of the MOU lists the grantee's, subgrantee's, contractor's, or subcontrator's name, then no additional pages of the MOU must be submitted).



Certification Regarding Debarment, Suspension, Ineligibility, And Voluntary Exclusion

Contractor Covered Transactions

- (1) The prospective contractor of the Recipient, <u>Surveying And Mapping, LLC</u>, certifies, by submission of this document, that neither it nor its representatives is presently disbarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- (2) Where the Recipient's contractor is unable to certify to the above statement, the prospective contractor shall attach and explanation to this form.

CONTRACTOR: Surveying And Mapping, LLC

By:

Signature Recipient's Name

Matt Sorensen - Director of GIS Operations RFP #24-0016

Name and Title Division Contract Number

501 North Market Street

Street Address

Maryville, MO 64468

City, State, Zip

03-06-2024

Date

867203556

DUNS number

02CY0

Cage Code



Department of the County Assessor

Jefferson County, Missouri PO Box 100 | 729 Maple St. Hillsboro, MO 63050-4317

Bob Boyer Assessor

P: (636) 797-5466 F: (636) 797-5470 JCAssessor@jeffcomo.org www.jeffcomo.org/assessor

Scope of Services for 2024 GIS Quality-Control Mapping Project February 5, 2024

The Department of the County Assessor seeks to provide a better overall Geographic Information System (hereinafter "GIS") to the public and other governmental agencies by developing better cadastral base layers within the existing GIS database. The Department of the County Assessor is seeking to solicit Request for Proposal (hereinafter "RFP") bids for the reconstruction of the following data layers: parcel boundaries, subdivision boundaries, and original lot/block boundaries.

Existing data and research that will be made available for this project will include the following:

- Existing GIS database (ArcGIS SDE database)
- Updated mylar tax maps (Selected firm will need to scan the original 36"x36" mylar tax maps)
- Recorded subdivision plats, deeds, and surveys from the County Recorder's Office online portal
- 2024 digital aerial photography (Flown by Eagleview anticipated to be available June 2024)
- County road right-of-way width data from the Public Works Department

The Department of the County Assessor currently maintains an existing parcel-based GIS program contained within an ArcGIS SDE database. The county currently has approximately 105.000 mapped parcels within the existing GIS database. The intent of this RFP is to reconstruct the specified data layers for the below mentioned areas and have it referenced to the adjusted Public Land Survey System to create an accurate GIS framework. The area outlined below are referenced graphically at the end of this scope.

Project Area

- \circ (260) 1^{**} = 400^{*} scale maps
- \circ (138) 1" = 200° scale maps
- \circ (116) 1" = 100' scale maps
- o 512 maps total
- Approximately 33.379 parcels +/-
- Covers 18 townships

All GIS data layers to be constructed shall be referenced to the following coordinate system: Missouri State Plane Coordinate System (East Zone). NAD 83 Datum, with units set to U.S. Survey feet, and shall conform to the Cadastral Mapping Survey Standards per Missouri Code of Regulations 2 CSR 90-65.010.

DATA DEVELOPMENT

Reconstruct Parcel Data Layer – (Defined project area only)

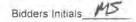
There are approximately 33,379+/- mapped parcels contained within the project area. It is the county's intent to reconstruct the parcel data layer to properly align with the PLSS data layers, right-of-way layer, original lot and original block data layers within the project area.

The following research shall be acquired and referenced to reconstruct the parcel data layer:

- Recorded Survey plats (accessible from the County Recorder's office online search portal)
- Existing mylar tax maps (to be scanned by selected firm)
- 2024 digital aerial photography (Flown by Eagleview anticipated to be available June 2024)
- County Assessor's office existing GIS database

Request for Proposal

12



The selected firm shall utilize Coordinate Geometry (COGO) methods to reconstruct the parcel data layer for parcels defined within recorded subdivision plats and/or recorded survey plats. For all aliquot part parcels, the PLSS data layer, road right-of-way layer, original mylar tax maps, and 2024 aerial photography shall be utilized to properly construct the parcels. There are several attribute data fields contained within the county's existing parcel feature class that will need to be transferred over to the reconstructed parcel data layer. The Department of the County Assessor will provide a list of all attribute fields that need transferred over to the selected firm.

Construct Subdivision Data Layer – (Defined project area only)

The selected firm will construct a subdivision polygon data layer within the county's existing GIS database. The following research shall be acquired and referenced to construct the subdivision data layer for each specified project area:

- Recorded subdivision plats (accessible from the County Recorder's office online search portal)
- Existing mylar tax maps (to be scanned by selected firm)
- 2024 digital aerial photography (Flown by Eagleview anticipated to be available June 2024)
- County Assessor's office existing GIS database

The subdivision data layer shall contain the appropriate attribute fields for the subdivision name, plat document number, and/or plat book and page, to allow for dynamic labeling purposes, querying, and searching within the county's GIS database.

Reconstruct Original Lot Data Layer- (Defined project area only)

The selected firm will reconstruct an original lot polygon data layer within the county's existing GIS database. The following research shall be acquired and referenced to reconstruct the original lot data layer for each specified project area:

- Recorded subdivision plats (accessible from the County Recorder's office online search portal)
- Existing mylar tax maps (to be scanned by selected firm)
- 2024 digital aerial photography (Flown by Eagleview anticipated to be available June 2024)
- County's existing GIS database (There is currently a lot line (polyline) layer and lot number (point) layer contained within the existing GIS database.)

The original lot layer shall contain the appropriate attribute fields for lot numbers to allow for dynamic labeling purposes within the county's GIS database.

Construct Original Block Data Layer – (Defined project area only)

The selected firm will construct an original block polygon data layer within the county's existing GIS database. The following research shall be acquired and referenced to construct the original block data layer for each specified project area:

- Recorded subdivision plats (accessible from the County Recorder's office online search portal)
- Existing mylar tax maps (to be scanned by selected firm)
- 2024 digital aerial photography (Flown by Eagleview anticipated to be available June 2024)
- County Assessor's office existing GIS database

The original block layer shall contain the appropriate attribute fields for block numbers to allow for dynamic labeling purposes within the county's GIS database.

DATA TOPOLOGY RULES

The selected firm shall utilize various topology rules to ensure spatial continuity throughout the completed data layers. ESRI geodatabase topology rules shall be used to verify edge matching, common boundaries, point duplication, connectivity, line quality, segmentation, and point criteria. Digital topology checks will be performed on the completed data layers within the GIS program. This will confirm that no gaps, slivers, overshoots or undershoots are present within each dataset.

Request for Proposal

Bidders Initials_MP

The following are the primary topology rules that shall be enforced within the GIS database:

- Parcel boundaries must not overlap
- Parcel boundaries must not contain gaps
- · Right-of-way boundaries must follow parcel boundary line
- Original Lot boundaries must follow parcel boundary lines
- Original Block boundaries must follow original lot boundaries

PROJECT WORKFLOW PROCESS

A defined project workflow shall be provided to the Department of the County Assessor that outlines each step of the project and how the newly constructed data layers will be implemented into the county's existing SDE GIS database. The Department of the County Assessor will continue maintaining their GIS database during the project and it will be imperative that a defined workflow process is implemented on how the newly created data layers are incorporated into the county's existing GIS.

PROJECT TIMELINE

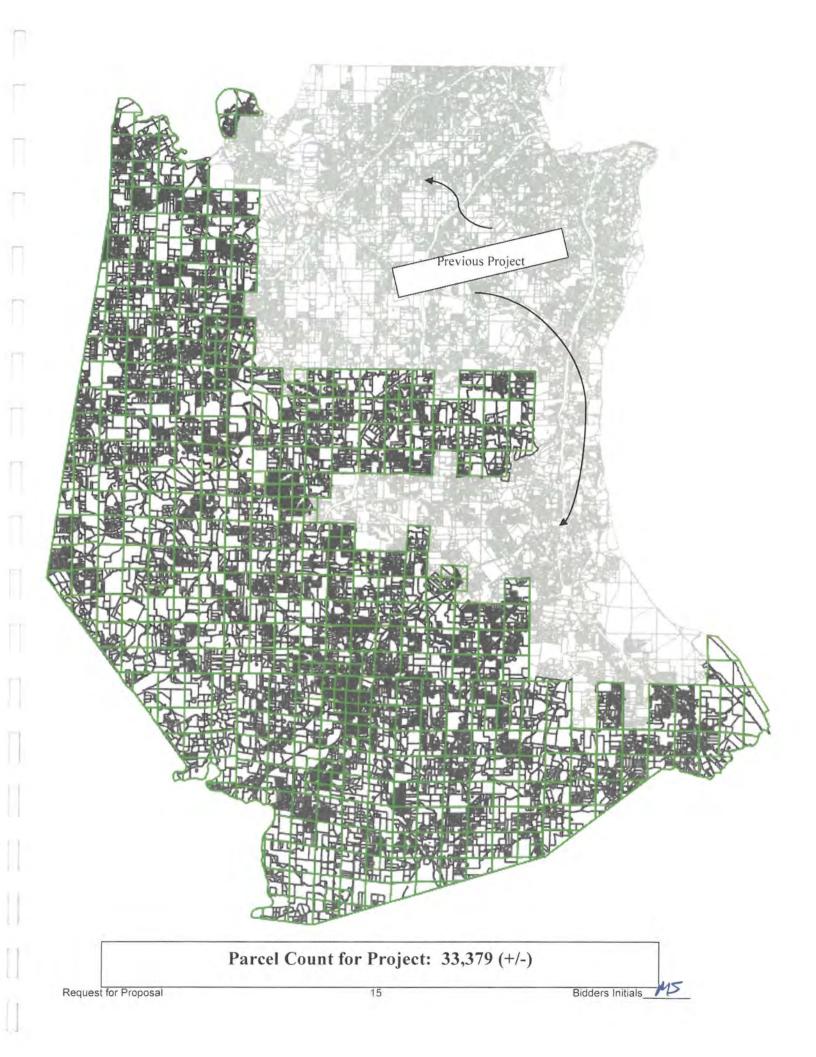
A project timeline shall be provided to the Department of the County Assessor that defines all major milestones and primary tasks that will be performed for this project. The Department of the County Assessor seeks to complete this project no later than two (2) years after commencement. Fee schedule shall be negotiated with the winning bidder.

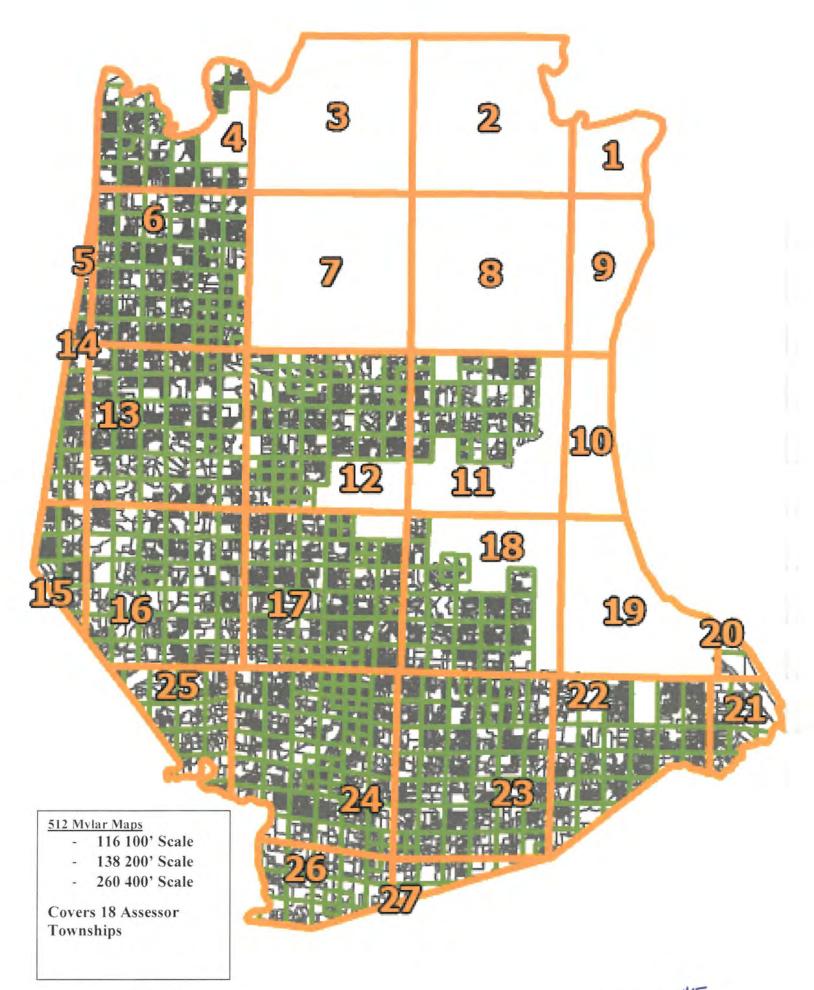
COUNTY CONTACTS FOR PROJECT INFORMATION

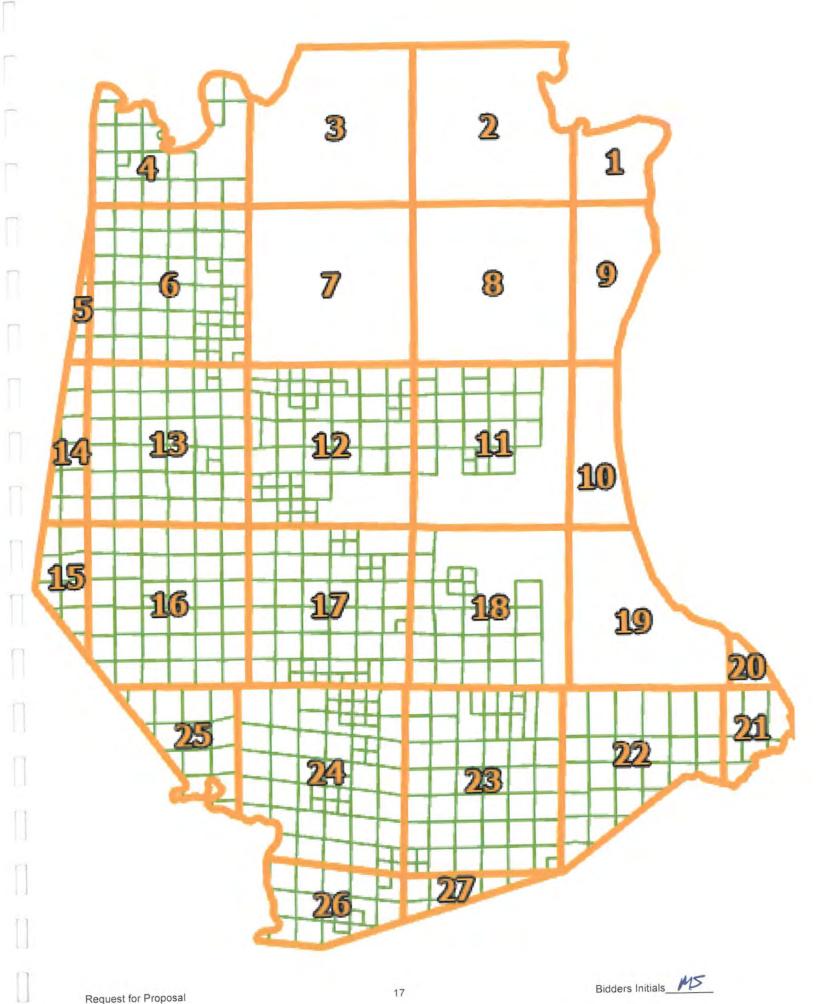
Bob Boyer, PLS – County Assessor Phone: (636) 797-5396 Email: RBoyer@jeffcomo.org

Sandra Kost, GISP – GIS Coordinator Phone: (636) 797-5041 Email: SKost@jeffcomo.org

Total Cost for the GIS Mapping Project \$ \$398.850.00







In Witness thereof, the parties hereto have executed this Agreement, in triplicate, as of this ______ day of ______ 2024:

Surveying And Mapping, LLC Company Name

Company Name

Signature Matt Sorensen Print

Company Address:

501 North Market Street

Maryville, MO 64468

Phone: 660-215-8970

County of Jefferson, State of Missouri

Dennis Gannon J. County Executive

I hereby certify under section 50.660 RSMo., there is either: (1) a balance of funds, otherwise unencumbered, to the credit of the appropriation to which the obligation contained herein is chargeable, and a cash balance otherwise unencumbered, in the treasury, to the credit of the funds from which payment is to be made, each sufficient to meet the obligation contained herein; or (2) bonds or taxes have been authorized by vote of the people and there is a sufficient unencumbered amount of the bonds yet to be sold or of the taxes levied and yet to be collected to meet the obligation in case there is not a sufficient unencumbered cash balance in the treasury.

Keper 21

APPROVED AS TO FORM

un & Corder for Jushe Kunzel

COOPERATIVE BID FORM

Bid Name: GIS Parcel Mapping Project 2024

INSTRUCTIONS: Bidders <u>MUST</u> fill out this form as part of the bidding process and attach to your bid response to Jefferson County, Missouri.

COOPERATIVE PROCUREMENT CONTRACT

This is a cooperating supply contract in accordance with Chapter 130, Section 130.020, K.3., of the Procurement Policy and Procedures, Jefferson County Code of Ordinances.

Will you extend bid prices, cash terms, and all other terms and conditions of any contract resulting from this bid with Jefferson County, Missouri, to any Jefferson County, Missouri, Municipality, government agency, district, sub-district or other tax-supported entity?

Yes X No

Although agreeing to the extension of the terms of this contract to municipalities or other tax-supported entities. *is not a prerequisite for award*, Jefferson County. Missouri, may take this factor into consideration if tie bids are received, in addition to the normal Terms and Conditions of the Invitation for Bid, enclosed herewith as a part of this bid.

Bidders are encouraged to extend contract prices to Municipalities and any other tax-supported entities.

If agreeable to the above, state the <u>minimum</u> dollar value *per order* you will require from a Municipality or any other tax-supported entity (this shall not apply to Jefferson County, Missouri Government, Departments or Divisions):

MINIMUM DOLLAR VALUE PER ORDER: \$ 0.00

BY: Matt Sorensen

TITLE: Director of GIS Operations

COMPANY: Surveying And Mapping, LLC

CONTACT INFORMATION FOR COOPERATIVE AGREEMENT

Phone 660-215-8970

E-mail matt.sorensen@sam.biz

THIS FORM WILL BECOME PART OF THE BID DOCUMENT PACKAGE SUBMITTED TO JEFFERSON COUNTY, MISSOURI





Company ID Number: 1259240

may subject the Web Services Employer, its subcontractors, its employees, or its representatives to: (1) prosecution for false statements pursuant to 18 U.S.C. 1001 and/or; (2) immediate termination of its MOU and/or; (3) possible debarment or suspension.

G. The foregoing constitutes the full agreement on this subject between DHS and the Web Services Employer.

Approved by:

Web Services Employer		11			
Surveying And Mapping, LLC					
Name (Please Type or Print)	Title	-			
Allison Davis					
Signature	Date				
Electronically Signed	01/04/2018				
Department of Homeland Security – Verifica	tion Division	-			
Name (Please Type or Print)	Title				
USCIS Verification Division					
Signature	Date	-			
Electronically Signed	01/04/2018				
		_			





Company ID Number: 1259240

Informati Information relating to your Co	on Required for the E-Verify Program
Company Name	Surveying And Mapping, LLC
Company Facility Address	4801 Southwest Parkway Building Two Suite 100 Austin, TX 78735
Company Alternate Address	
County or Parish	TRAVIS
Employer Identification Number	742704974
North American Industry Classification Systems Code	541
Parent Company	
Number of Employees	500 to 999
Number of Sites Verified for	1

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The ACORD name and logo are registered marks of ACORD

All policies (Workers' Compensation/EL) include a blanket automatic additional insured endorsement [provision] that confers additional insured status to the certificate holder only if there is a written contract between the named insured and the certificate holder that requires the named insured to name the certificate holder as an additional insured. In the absence of such a contractual obligation on the part of the named insured, the certificate holder is not an additional insured under the policy.

All policies include a blanket automatic waiver of subrogation endorsement [provision] that provides this feature only when there is a written contract between the named insured and the certificate holder that requires it. In the absence of such a contractual obligation on the part of the named insured, the waiver of subrogation feature does not apply.

All policies (except Workers' Compensation/EL) contain a special endorsement with "primary and noncontributory" wording.