



City of Fort Lauderdale



Submission to

The City of Fort Lauderdale

**Request for Proposal (RFP) for
Facilities Condition Assessment**

RFP Event No. 243

May 1, 2024

Roth IAMS LLC.
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Proposal No. P24019

Roth **IAMS**
Integrated Asset Management Strategies



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1 EXECUTIVE SUMMARY

Roth IAMS LLC (Roth IAMS) is pleased to provide the City of Fort Lauderdale (City) with this proposal in response to the Request for Proposal (RFP) for Facilities Condition Assessment, RFP Event No. 243. We acknowledge receipt of the following Amendments:

- Amendment 1 - issued April 11, 2024
- Amendment 2 - issued April 12, 2024
- Amendment 3 - issued April 16, 2024
- Addendum 4 - issued April 23, 2024
- Amendment 5 – issued April 29, 2024

Completed copies of the following forms extracted from the RFP document and additionally required documents have been uploaded under separate cover through the bidding system:

- Non-Collusion Statement;
- Non-Discrimination Certification Form;
- Contract Payment Method;
- Local Business Preference (LBP);
- Disadvantaged Business Enterprise Preference (DBEP);
- E-Verify Affirmation Statement;
- Affidavit Of Compliance With Foreign Entity Laws
- Bid/Proposal Certification;
- References
- Sample Insurance Certificate;
- W-9 for Proposing Firm; and
- Active Status Page from Division of Corporations – Sunbiz.org.
- Addendum 4

1.1 WHY ROTH IAMS

Imagine a world where your facility asset management and capital plans were based on consistent and defensible data. **Imagine** that there was a way you could have all the data that you need to make informed decisions right at your fingertips. **Imagine** not being stressed that your organization is underfunded and unequipped to deal with the politics and pressures when it comes to capital planning. **Imagine** having the capability to make better business decisions. **Imagine** your organization's buildings and assets just being...better.

To take the first step in making this your reality, please consider partnering with Roth IAMS to provide you with the Facility Condition Assessments for your portfolio. The rest of our proposal will highlight to you how our team has guided clients just like you through a project similar to this.

1.2 CORPORATE PROFILE

Roth IAMS, operating in the United States as Roth IAMS LLC (A Delaware Limited Liability Corporation) and in Canada as Roth IAMS Ltd. (Federally Incorporated) (2014) company formed for the sole purpose of providing Facility and Infrastructure Assessments and Asset Management Services for large and/or geographical diverse portfolios across North America. For the purpose of this proposal, the primary contact is as follows:

William (Bill) Roth, President & CEO
800-360 Central Avenue, St. Petersburg, FL USA 33701
813-379-9345 ext. 101
bill.roth@rothiams.com

Roth IAMS has a single office located in the US, with our site assessment professionals working remotely across the US. The primary staff that will be responsible for the completion of the on-site assessments are based in Florida.

1.3 OUR VISION & CORE VALUES

At Roth IAMS our vision is **“To Solve the World’s Deferred Capital Renewal and Maintenance (DCRM) Backlog Crisis”**.

At Roth IAMS we live our core values in every interaction that we have with our clients and each other.

- **Collaborative** – Only by understanding each other and our uniqueness can we tailor the best solutions for our clients.
- **Passionate** – Our love for what we do and why we do it drives us towards excellence.
- **Consistently Curious** – We are always seeking knowledge and challenging the status quo.

We trust that these values will come through in the information outlined in this proposal. We truly believe that these values set us apart from other organizations that provide the same services we do. We look forward to putting our vision and core value to work with the City on this important project.

1.4 COMPANY EXPERTISE

Throughout this proposal we will demonstrate our Company’s breadth and depth of experience that provides the City with a unique value should we be selected to collaborate on this important project. We feel the following differentiates us from our competition:

1.4.1 Condition Assessment Expertise

Our team of experienced project managers and site assessment professionals have unparalleled expertise in delivering consistent and defensible condition assessment data that has assisted our clients in securing over **\$5 Billion** in additional renewal funding for their existing buildings. In addition to our FCA expertise, our team members have

extensive expertise working with clients to utilize their FCA and other technical data (e.g., environmental, energy, functional, sustainability, etc.) to design and execute capital renewal programs.

The key staff members involved in Roth IAMS have collaborated on projects for nearly 30 years ensuring our clients that our team will work together seamlessly to achieve the collective project team goals. Our team members have been involved in delivering FCAs for over **25,000** properties.

1.4.2 Proposed Team Member Experience

The key members of our proposed project team have been involved in over 25,000 FCAs. The scope of work that we are proposing is based on a foundation that has been refined over 30 years. Our team will configure our approach to meet the City's goals and objectives for the project, while delivering consistent and defensible asset condition data.

Roth IAMS has all the required resources in-house so City does not have to be concerned about any inter-company issues as all resources fall under the supervision of our Project Management team.

1.4.3 Understanding of the Municipal Government Asset Management

Through the extensive collective project experience of our team, we have been exposed to a wide range of issues and concerns that face Municipal/Regional governments. Our projects have included FCAs, Reserve Fund Studies (RFSs), Accessibility Assessments, Equipment Inventory & Tagging and Energy Audits, but have also included Asset Management Framework and Plan Development, Capital Planning and Organizational Consulting. This diverse experience gives us a real-world understanding of the municipal sector that will be applied throughout this project.

1.4.4 Proposed Pilot Program

Roth IAMS always recommends that each large portfolio project include a Pilot Program at the outset. By completing the entire scope of work on a small sample of buildings, we are able to validate the assumptions of all stakeholders and develop an agreed approach that will then be applied to all the remaining buildings across the portfolio. This approach generally requires additional time at the project outset, but in our experience, saves considerable time at later stages of the project by avoiding costly revisions to a large number of reports, and potential remobilization to sites.

1.4.5 Recognition by Leaders in Facility Asset Management

Roth IAMS has been awarded multi-year FCA contracts by some of North America's largest governmental agencies. Roth IAMS is currently completing a 5-Year Program where our team will assess all Ontario College and Ontario University facilities, which includes a portfolio of over 140 million square feet of active educational space. Additionally, we are collaborating with the City of Vancouver, the City of Calgary, Infrastructure Ontario and the Government of Saskatchewan Ministry of Central Services on multiyear FCA projects for their portfolios of diversified facilities.

1.4.6 Asset Management Expertise

Roth IAMS has a primary focus of assisting institutions design, execute and monitor Integrated AM Plans and Strategies. Our proposed project team has collaborated with some of the largest public sector clients across North America to align their FCA and AM Programs.

Our project work has included the development of Multi-year Integrated Capital Plans, Municipal Asset Management Plans (AMPs), AM Policy Development, AM Framework Development, Multivariable Prioritization Development and On-Going Data Management and Strategies.

We believe that AM must look at assets in a holistic way and go beyond just condition. The best asset investments can only be made when clients view their portfolios with a whole-asset approach to understanding all the competing factors that impact asset performance (condition, regulatory concerns, environmental concerns, functional/program concerns as well as energy/sustainability opportunities).

1.4.7 Asset Management Software Expertise

In addition to the professional services offered through Roth IAMS, we are also a licensed reseller of facility management software offered through our sister company, SLAM Technologies Ltd. (SLAM). SLAM is co-owned by Bill Roth, Roth IAMS Founder and President, and provides software-as-a-service (SaaS) facility asset management tools that support Roth IAMS in the delivery of many of our professional services. Additionally, for clients that wish to leverage the SLAM technology, Roth IAMS is able to offer annual licenses to our clients as well.

1.4.8 Customized Approach

Our approach to condition assessments first starts with an understanding of your Asset Management Story. Our team wants to understand the City's goals and objectives as it relates to this project and how this project supports the City in achieving them. This allows us to customize the deliverable to align with your needs rather than simply providing a "cookie cutter" condition assessment report. It also allows Roth IAMS to understand the format of the end deliverable to best suit your objectives.

1.5 MINIMUM QUALIFICATIONS

Roth IAMS is pleased to provide the following in response to the Minimum Qualifications requirements outlined in the RFP:

- Roth IAMS core business is providing consistent and defensible FCA data to public sector clients across North America, as such we are in the business of providing FCAs to clients like the City;
- The key staff listed below are all professional facility assessors having collaborated on projects similar in size and larger than that being requested by the City. We do not employ designers or project managers that dabble in FCAs when they have nothing better to do;

- Roth IAMS recently celebrated our 10th anniversary and have grown from a sole practitioner to a team of over 100 full-time facility asset management professionals, as such we feel that have demonstrated the financial stability to satisfy the City;
- Bill Roth, our Founder and proposed Principal-in-Charge, a resident of Florida, has personally been involved in over 20,000 FCAs over the last nearly 30 years;
- Roth IAMS has provided a number of client references that can demonstrate Roth IAMS qualifications and abilities. We welcome the City to connect with our references.
- Roth IAMS does not have any judgements or pending lawsuits against the City, any activities involved in moral turpitude or any conflicts of interest associated with the completion of this work; and
- Roth IAMS is not in arrears or default in any debt or contract involving the City.

1.6 PROJECT TEAM

Roth IAMS' team includes full-time staff (no independent contractors) with the expertise in all disciplines required to meet the City's scope of work including Architects, Civil/Structural, Mechanical and Electrical Engineers. To the City, this means that all the resources required to complete the project are within our organization so the risk of logistical issues with multi-company teams is eliminated. Also, by having our staff as full-time employees, it means that Roth IAMS has the ability to train and invest in the professional development of our staff, resulting in the collection of a more consistent and defensible dataset to support the City's FCAs.

Roth IAMS confirms that the staff named herein are available to provide the services outlined in our proposal.

To demonstrate our capacity to complete the work within the timeframe required, Roth IAMS is pleased to provide more site assessment staff that would be required to complete the proposed scope of work.

1.6.1 Principal-in-Charge – William (Bill) Roth, P.Geo.

Bill will be the Principal-in-Charge for our team and will work closely with the City's Project Manager to deliver a successful project.

Bill has nearly 30 years of experience collaborating with clients from across various real estate sectors assisting them in designing, executing, and managing FCA projects for large geographically diverse portfolios across North America. Bill has personally overseen the completion of over **20,000 FCAs** across all types of facilities including government buildings, office, retail, industrial, healthcare, education, aviation and recreational. Bill's personal U.S. experience includes FCAs for King County (Seattle, WA), Hillcrest Healthcare, Alaska Department of Health and Social Services, Virginia, and Louisiana Departments of Transportation, and Core Civic (Formerly CCA). Bill is familiar with many of the commercially available Capital Asset Management Systems (CAMS) as well as Computerized Maintenance Management Systems (CMMS) and has supported

the developers of various CAMS/CMMS by providing insight to improve upon the software functionality and reporting capabilities.

1.6.2 Project Manager – Paul Robson

Paul will be the City's first point of contact on this project. As Project Manager, Paul will be responsible for the project delivery schedule, and the consistency of data provided to the City.

Paul is a detailed oriented team player with a background in Facility Management where he gained over 20 years' experience providing emergency, predictive and preventative maintenance, Central Plant Operations, and management to two major healthcare facilities in Ontario.

Paul has been providing Project Management, Facility Assessment and Capital Planning Services over the last 15 years. He has conducted facility assessment of approximately 1000 buildings overall throughout Canada and the United States, including British Columbia, Alberta, Saskatchewan, Ontario, Alaska, Virginia, California, and Massachusetts. The services provided include project management, staffing, coordination, budget, and operational concerns as well as client communication. He has experience conducting, and leading field assessments, and compiling technical reports. He has also been involved in energy, accessibility, and seismic type assessments.

Paul has assessed the Architectural, Mechanical and Electrical building systems of a variety of assets including commercial, institutional, research, governmental, residential assets, and infrastructure. Specifically, the assets have included police stations and detention centers, data centres, Department of Defense security sensitive buildings, standalone retail spaces, mall complexes, medical facilities, schools, research and lab facilities, commercial rental units, detached residential buildings, high-rise residential developments, as well as social housing projects.

1.6.3 Deputy Project Manager - Abdel Hamed Hassan, B.Sc.

Abdel is an experienced Deputy Project Manager, mechanical engineer, and senior facility assessor at Roth IAMS, with over 25 years of consulting experience in the fields of facility assessment and capital planning. During his career, Abdel has focused on the physical assessment of commercial, and industrial properties for various clientele, for the purposes of capital planning.

Abdel Hamed has completed the physical mechanical, electrical, and plumbing assessment of capital components for over 500 facilities located in northern, and southern United States, and central and northern Canada.

He completed FCAs for U.S. clients, including University of Minnesota campuses (Minneapolis, St. Paul, Duluth, Hormel, and Crookston, MN) University of Southern Mississippi (Hattiesburg, MS), Knox County School District (Knoxville, TN), and in Canada for Carleton University (Ottawa, ON), Victoria University (Toronto, ON), and Government of Manitoba wide variety of facilities.

1.6.4 Discipline Leaders

Our Project Manager will be supported by a team of Discipline Leaders (DLs) that each bring a unique area of expertise to the project. The DLs will be involved throughout the project to ensure the issues associated with their disciplines are integrated with the City's business processes and objectives. Our proposed DLs are as follows:

1.6.4.1 Architectural and Structural – Mike Plomske, P.Eng.

In his role as Discipline Leader, Mike will be responsible for technical content related to architectural and structural elements assessed and reported.

After completing his Bachelor of Science in Civil Engineering, Mike advanced his building science skills by completing a course in Building Envelope Solutions, from the Institute of Technology, BC. For over 20 years Mike has focused on the condition and performance of building and site elements, especially with building envelopes. He has completed independent assessments of building envelope systems and roof cover systems.

He has physically assessed over 1,500 properties located in northern, central, and western Canada, as well as in Alaska and other locations in the western United States. His assessments have provided building owners with information to obtain mortgage financing or acquisitions and maintain capital asset management plan. Some of the sectors in which Mike has been involved include commercial, residential, industrial, healthcare, K to12 and higher education.

In addition to his FCA experience, Mike is also skilled in capital replacement reserve fund analysis, new construction cost estimating, and accessibility studies. At Roth IAMS he is also part of the onboarding program, training new assessors develop and improve their assessment skills.

1.6.4.2 Mechanical – Don Girardi. B.S., M.E. A.S./Struct., ABA

Don is a Technical Reviewer at Roth IAMS LLC. Don is a licensed engineer and has more than 24 years of experience in the field of facilities systems engineering with Assessment experience in thirty-eight states and 5 countries. His facilities work includes project management for medical, multifamily, healthcare, assisted living, office, residential, universities, K-12, government facilities both in the United States and abroad. He has performed over one thousand (1,000) Property Condition Assessments (PCA) and Physical Needs Assessments (PNA) for a diverse array of buildings and properties throughout the United States and abroad. He is knowledgeable with local and federal building codes, ADA requirements, and Fair Housing guidelines.

Don has experience in the equity-scope due diligence arena primarily in the engineering field and specializes in mechanical systems with mechanical engineering discipline and the construction industry. Don is knowledgeable with ASTM Standard Guide for Property Condition Assessments, accessibility standards including FHAA and ADA, and ASTM Standard Guide for Seismic Risk Assessment of Buildings.

1.6.4.3 Energy – Curtis Loblick, P.Eng., CEM

Curtis is an experienced professional engineer and certified energy manager (CEM designation 2011) with over twenty years of experience. He has overseen all aspects of facility asset management, leading multidisciplinary teams responsible for the review of millions of square feet of buildings. His career also focused on capital planning, energy efficiency consulting, sustainable building consulting, preventative maintenance planning, program and policy planning and condition assessments. His expertise has allowed him to work on many projects across Canada and internationally. Curtis' strong design background and on-site construction experience has allowed him to quickly assume a leadership role and deliver sound, cost-effective projects that are delivered on time and on budget. He values client relationships as an important factor in the successful delivery of projects. Included in this experience is his work developing a sustainable energy framework for Barbados where he worked on assessing the Country's current state in implementation of energy efficient practices and program and policy development to help guide change. Curtis' U.S. project experience includes FCAs for King County (Seattle, WA), Core Civic (formerly CCA).

1.6.4.4 Electrical – Detlev Grad, P.Eng.

In his role as DL for the electrical elements, Detlev will be responsible for the quality of the condition data for the asset's fire protection, and electrical systems.

Detlev is an electrical engineer by profession. Over the last approximately 19 years, most of which have been in condition assessments and engineering analysis, he has advanced his skills and knowledge to also assess the performance of mechanical systems.

At Roth IAMS he is the Electrical Discipline Leader, mentoring staff in the assessment of electrical elements. He has written Standard Operating Procedures (SOPs) related to the electrical elements in the building and on site. His other roles are Senior Technical Reviewer and Subject Matter Expert (SME) where he is responsible for Quality Assurance and Control (QA/QC) for Facility Condition Assessment Report (FCR) deliverables and for the Corporate Technical Knowledge Database.

1.6.5 Site Assessors

Our team believes the site review is a critical component to the execution of a condition assessment and as such we believe this should be undertaken by experienced, qualified staff. It is important to have this experience to determine where a building component is within its expected useful life as this is dependent on how often the component is used, how well it is maintained and typical signs of wear and tear, and not simply based on the components age.

The composition of our assessment teams will be based upon the age, size and complexity of the specific assets included in our scope of work. Roth IAMS is pleased to provide the following key site assessment staff that will support us should we be selected as the successful proponent.

1.6.5.1 Joel F. Mooney, CFM, CPI, MSED.

Joel is a Facility Assessor of Roth IAMS LLC. Joel has the knowledge and experience to complete generalist-level assessments of smaller/simpler assets wherein he will be responsible for assessing all elements within a building. Since 2014, he has completed Life Safety assessments for Hospitals, and assisted with three successful Joint Commission Surveys for Healthcare Facility Departments.

Joel has senior-level Facilities Management experience with clients in Healthcare, K-12 & Higher Ed. Institutions, Banking and Commercial Real Estate Investment groups, and twenty years' experience in Commercial/Retail/Office Construction management for clients across the Southeast U.S.

Joel is proficient in the use of Capital Asset Management Software (CAMS) used in asset data collection and reporting such as SLAM.

In addition to the above, as a Senior Project Manager, Joel has also managed the completion of over 100 Construction projects for clients in South Florida

1.6.5.2 Michael Novick, RA, AIA

Michael is an architectural/structural assessor with the knowledge and experience to assess the building foundation, structure, exterior walls, windows, doors, roofs, interior construction and interior finishes. He also has the skills to assess the site infrastructure i.e. roads, parking lots, retaining walls, tunnels, etc. Michael also has the knowledge and experience to complete generalist-level assessments of smaller/simpler assets wherein he will be responsible for assessing all elements within a building.

Since 2015 Michael has completed assessments for a wide variety of assets for Municipal, K-12 and Higher Education, Healthcare, Industrial, Commercial, Agency (HUD, Fannie Mae, Freddie Mac) and Institutional clients.

Michael is proficient in the use of Capital Asset Management Software (CAMS) used in the asset data collection and reporting such as SLAM, Quire, EDR Parcel and KyKloud.

In addition to FCAs, Michael has also completed Equipment Inventory and Tagging, Barrier-Free Accessibility Assessments, is TAS (Texas Accessibility Standard) certified and has performed Energy Audits/Assessments.

1.6.5.3 Johnny Moore, NCBDC, CPBD, ACTCP

Johnny is an architectural/structural assessor with the knowledge and experience to assess a buildings foundation, structure, exterior walls, windows, doors, roofs, interior construction, and interior finishes. He also has the skills to assess the site infrastructure i.e., roads, parking lots, retaining walls, tunnels, etc.

Johnny also has the knowledge and experience to complete generalist-level assessments of larger/more complex assets wherein he will be responsible for assessing all elements within a building.

Since 2005 Johnny has completed assessments for a wide variety of assets for Municipal, K-12 and Higher Education, Healthcare, Industrial, Commercial, Agency (HUD, Fannie Mae, Freddie Mac) and Institutional clients.

As a Certified Professional Building Designer for 30 + years, Johnny excels in detail-oriented communication skills, customer service and focused recording and reporting of existing building and site conditions. His experience includes project team management, and due diligence coordination, .

Johnny is proficient in the use of Capital Asset Management Software (CAMS) used in the asset data collection and reporting such as Slam, Quire, 4-Tell, and Bluedag, Facility Dude, and Asset Calc.

In addition to FCAs, and ADA assessments, Johnny has also completed Equipment Inventory and Tagging, Barrier-Free Accessibility Assessments, is TAS (Texas Accessibility Standard) Trained and ACTCP (ADA Coordinator Training Certification Program) certified.

1.6.5.1 Jessica Langebeeke

Jessica is an architectural/structural assessor with the knowledge and experience to assess the building foundation, structure, exterior walls, windows, doors, roofs, interior construction and interior finishes. She also has the skills to assess the site infrastructure i.e. roads, parking lots, retaining walls, tunnels, etc.

Jessica also has the knowledge and experience to complete generalist-level assessments of smaller/simpler assets wherein she will be responsible for assessing all elements within a building. Since 2022 Jessica has completed assessments for a wide variety of assets for Higher Education, Healthcare, Industrial, and Commercial clients.

Jessica has assessed major Casino properties that include hotels, commercial spaces, and parking garages across North America, along with many other properties. She is detail oriented and has great communication skills.

Jessica is proficient in the use of Capital Asset Management Software (CAMS) used in the asset data collection and reporting such as SLAM, KyKloud and Quire.

In addition to FCAs, Jessica has also completed Equipment Inventory and Tagging, Barrier-Free Accessibility Assessments.

1.6.5.2 Michael Musial

Michael is a mechanical and electrical assessor with the knowledge and experience to assess building services including heating, cooling, utilities, distribution, plumbing and fire suppression systems and equipment. He also has the skills to assess the site infrastructure, water, sanitary, storm, and electrical distribution and HVAC-R systems.

Since 2021 Michael has completed assessments for a wide variety of assets for Municipal, K-12, Higher Education, Healthcare, Industrial, Commercial, & Institutional clients.

Michael is proficient in the use of Capital Asset Management Software (CAMS) used in the asset data collection and reporting such as SLAM and Asset Planner.

In addition to FCAs, Michael has also completed Equipment Inventory and Tagging, Barrier-Free Accessibility Assessments.

2 EXPERIENCE AND QUALIFICATIONS

Roth IAMS has been in business for over 10 years providing FCAs and other facility and infrastructure asset management services to public sector entities, including hundreds of municipal government clients across North America.

Roth IAMS LLC is a Delaware Limited Liability corporation. Our US headquarters is located at 800 – 360 Central Avenue, St. Petersburg, Florida 33701. Roth IAMS is not a minority or woman-owned business.

For the purpose of this proposal, the primary contact is as follows:

William (Bill) Roth, President & CEO
800-360 Central Avenue, St. Petersburg, FL USA 33701
813-379-9345 ext. 101
bill.roth@rothiams.com
www.rothiams.com

2.1 OVERVIEW OF SERVICES AND COMPANY SIZE

Our team includes over 100 full-time Architects, Engineers, Geoscientists, Technologists, Technicians and Facility Management professionals whose shared vision is to solve the world's deferred capital renewal and maintenance backlog crisis.

Roth IAMS core business is FCAs. We are not a design firm that does FCAs in its spare time. We are not an engineering company that does FCAs for a chance to work on the renewal projects. We are not a software company that is trying to sell software licenses.

In addition to our assessment expertise, our team members have extensive expertise working with clients to utilize their existing facility assessment and other technical data (e.g., environmental, energy, functional, sustainability, etc.) to design and execute capital renewal programs and Asset Management Plans. We also provide the following services outlined in Table 1 below:

Table 1 - Our Services	
Asset Management	Asset Data Collection

• Asset Management Planning • Capital Renewal Planning • Asset Management Database Maintenance • Asset Management Software • Data Mining and Analytics	• Facility Condition Assessments • Infrastructure Condition Assessments • Structural Assessments • ADA Assessments • Energy Auditing and Consulting • Asset Inventory and Tagging
Facilities Management • Preventative Maintenance Planning • Facilities Management Plans and Consulting • Green Building Strategies, Policies and Procedures	Building Performance • Building Performance Check-Up • Commissioning • Re/Retro-commissioning

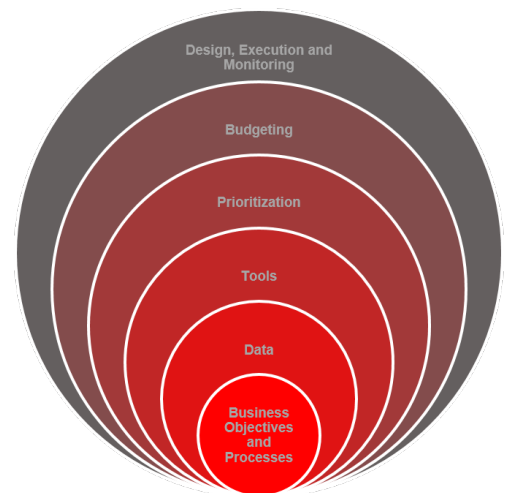
2.2 PROCUREMENT POWERED BY SOURCEWELL

Roth IAMS was selected by Sourcewell as the highest ranked proponent in North America out of 18 bidders on the Facility Assessment and Planning Services contract. For more information about our industry leading partnership with Sourcewell, please visit www.sourcewell-mn.gov/cooperative-purchasing/020421-rth.



2.3 OUR PHILOSOPHY

Traditional Asset Management has been executed through silos within organizations, with each department responsible for its own asset type (buildings, roads, water/wastewater, etc.) or a specific discipline associated with an asset (capital, maintenance, environmental, energy, etc.), and has focused on short term vs long term goals. Based on our experience, this approach results in lost opportunity for asset and financial optimization. We believe that by collaborating with all stakeholders, an integrated strategy will result in a more efficient (lower capital costs) and effective (better business outcomes for invested capital) allocation of capital dollars, while leveraging assets towards the overall goals of our client.



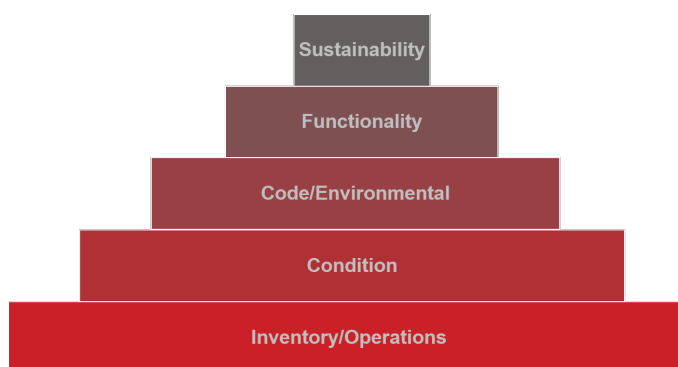
We understand that some of the aspects of the Integrated Asset Management Framework outlined below are beyond the scope of work for this project. However, we felt that it would provide greater context to our approach to include the entire framework.

2.3.1 Business Objectives and Processes

To support the business-focus of any Asset Management Framework, it must be founded on current and long-term Business Objectives and Business Processes. All decisions and plans must further the overall client objectives and be feasible within the corporate structure that is driven by business processes. In addition, while ensuring tactical strategies to address near-term needs, it is critical to ensure that the focus on the long-term strategies is not forgotten.

2.3.2 Data

Reliable data is the integral part of understanding any issue related to an existing asset, whether that be condition data, regulatory/code liability, performance, space utilization, energy consumption, etc. For an organization to determine the optimal data required, it needs to focus on the desired project outcome(s). The type of data



collected, the necessary level of detail, and the team or teams responsible for collecting it will all impact the downstream ability to plan based on the data, and the overall project costs. For a project to be successful, the project team must understand the current state of data, and to develop a framework going-forward to allow data collection to be done in alignment with our client's existing Asset Management Framework.

The foundation of any sustainable buildings program is the comparison of the performance or design of capital assets against current industry standards and best practices. What gets measured can be managed. The collection of the appropriate data can allow for benchmarking of current performance, the establishment of reasonable targets for improvement, and the monitoring of progress towards these goals.

2.3.3 Tools

With a clear picture of the type and amount of data that will be required, the next critical factor is related to the tools that will be used to store, manage and manipulate the data. If the dataset is relatively limited a spreadsheet may meet a client's functionality needs. However, for a large, complex set of data, or where sophisticated prioritization and business case development is required, more robust tools will be required to provide the desired analysis.

2.3.4 Prioritization

The Competition for Capital continues to increase for portfolio owners/managers as assets age, energy/resource prices rise, and government regulation becomes more intense. The simplistic “High, Medium and Low” prioritization methodologies employed are no longer sufficient to manage portfolio risks.

Almost all organizations have a significant deferred maintenance backlog and lack the capital required to address even its “High” needs, not to mention Medium or Low priorities. As such, for complex, diverse portfolios we recommend a more robust priority scheme based on weightings and algorithms supported by overall corporate business objectives. In this way mission critical assets can rightly access higher levels of funding than support assets. Demographics, functional adequacy, energy performance and other key issues that impact business can be built into the priority scheme.

2.3.5 Budgeting

At this stage of the process, we shift from a highly technical focus (collecting, managing and manipulating building data) that is generally within the comfort zone of the staff responsible for the maintaining the assets and who have a grasp of its complexity. To effectively communicate with the senior executives who will fund the asset management program it is vital that we “translate” all the technical data into a high-level financial and risk-based discussion.

2.3.6 Design, Execution and Monitoring

With the technical requirements clearly communicated, budgets in-place it is time to move the program forward from the planning stage to the design and construction phases. There are two areas of focus that are sometimes overlooked during renewal projects, which are critical to the development of an on-going asset management program. These are commissioning and post project operational monitoring.

Commissioning provides confirmation that the mechanical systems have been installed and are operating as they were designed and should allow for the achievement of the overall goals of the proposed work plan. Post-project operational monitoring also provides additional data to demonstrate that a project achieves the specific results (e.g. energy savings, improved ventilation, etc.) it was designed to. Each of these processes creates additional data that can be fed back into the framework at the foundation to allow for on-going asset management.

2.4 OUR CLIENTS

Roth IAMS team members have conducted FCAs on some of the largest portfolios of buildings across North America including those listed in Table 2 below:

Table 2 – List of Clients	
State of Maine City of Corona (CA) Sno Isle Libraries	All 24 Ontario Colleges Ontario Ministry of Infrastructure Alberta Infrastructure

Table 2 – List of Clients	
University of Southern Mississippi	Government of Saskatchewan Ministry of
Florida A&M University	SaskBuilds and Procurement
University of Florida	Government of Manitoba
Stetson University	Government of Yukon
University of Minnesota	Government of Northwest Territories
City of Alabama*	Government of Nunavut
City of Columbia, Missouri*	All 21 Ontario Universities
City of Columbia, MO*	University of Saskatchewan
Baylor City*	University of Regina
College Station*	Capilano University
Clark County School District, NV*	City of Calgary
Maryland School For The Blind*	City of Edmonton
Evergreen Schools*	City of Vancouver
School District of Palm Beach County	City of Victoria
	And many more.

(*- represents projects that were completed by our staff prior to joining Roth IAMS)

2.5 LICENSES

Roth IAMS is licensed with SunBiz to do business in the State of Florida. A copy of our license has been included under separate cover in the bidding system.

FCA Services are not considered engineering as per the ASTM Standard E2018-24: Standard Guide for Property Condition Assessments, and therefore does not require professional licensure to complete. However, many of Roth IAMS staff are also licensed professionals (Architects, Engineers, Technicians/Technologists, Geoscientists, etc.). In addition to being licensed in their home jurisdictions, several of our staff are licensed in multiple jurisdictions as required by specific clients for specific engagements. If successful in this pursuit, and if required by the City, Roth IAMS will secure professional licensure in Florida.

2.6 SUSTAINABILITY

Our company focus is on completing portfolio condition assessments and asset management planning. Our core business is focused on working with our clients to help plan future improvements to buildings so that they can provide a healthy environment for the occupants. We are proponents of managing, maintaining and improving what we have, to limit the need to build new. Often new buildings are constructed and result in others sitting idle and empty.

2.6.1 Managing Travel and Mobilization

We work on portfolios across Canada which means staff often need to travel to sites. We work with our clients to plan site reviews to consolidate reviewing multiple buildings and reduce mobilization costs and the environmental impact of multiple mobilizations. Where possible Roth IAMS employees can work from home reducing congestion on our

highways and reducing CO2. We avoid unnecessary travel through team meetings, on-line meetings, telephone and email.

2.6.2 Paperless Office

As an internal sustainability initiative Roth IAMS has been working towards a paperless office. Unless specifically requested by our clients we do not provide printed hard copies of reports. We conduct our peer reviews electronically. We have moved towards using iPads and tablets for site reviews to gather information and mark up drawings on site. All office paper and stationery purchased is FSC Certified, where applicable.

2.6.3 Recycling and Composting

Roth IAMS' corporate office has paper, plastic and cardboard recycling programs setup in-suite. Additionally, through our Property Manager, used printer toner, battery and electronic equipment is recycled within the building. Organic waste is composed through the building's composting program.

2.6.4 Waste Reduction

Roth IAMS provides staff with reusable cups, glasses, china and flatware in our kitchen to reduce the usage and disposal of paper/plastic alternatives.

2.6.5 Re-Use and Social Responsibility

Roth IAMS gives back to the community by supporting annual clothing drives, food drives and holiday gift donation programs run within our office building and communities.

2.7 LIST OF ASSESSMENTS

Roth IAMS core service is FCAs. We have completed or are nearing the completion of 275 FCA projects dating back to 2019, totaling over \$24 Million in fees. We are not a firm that provides FCAs in our spare time, or when we have no other work to do. Our team consists of over 100 professional facility assessment staff. As a result of the sheer number of projects completed, we have included them in **Appendix 1**.

Given the sheer volume of projects listed, we are not able to provide detailed project information requested in the RFP for each of the **275 projects**. However, we do confirm that each of the projects listed included FCAs for a portfolio of public sector facilities.

The amount of effort that would be required to pull this information together for this many projects would make it unreasonable as part of this response and would result in our submission being much greater than the 100 page maximum suggested by the City. We trust that the City will understand and will recognize our expertise in FCAs based on the information that we have provided.

However, Bill Roth, our proposed Principal-in-Charge was also Principal-in-Charge for each of the projects listed. Additionally, our Project Manager and Discipline Leaders were also involved in many of the projects since the time that they joined Roth IAMS.

Roth IAMS has provided further details on a series of reference projects in Section 4.0 of the proposal.

3 APPROACH TO SCOPE OF WORK

3.1 PROJECT UNDERSTANDING

Having completed over 25,000 FCAs, many for municipalities, as well as assisted many organizations in developing detailed Asset Management Plans (AMPs), Roth IAMS understands the need for consistent and defensible asset data. Whether focused on developing prioritized, multiyear capital plans to address Deferred Capital Renewal and Maintenance (DCRM), or as part of a larger corporate AMP, understanding the current for forecasted future renewal needs forms the foundation on the process.

Through the completion of the FCAs for the properties listed in the RFP, the City will be able to forecast not only the 20-year future needs as requested in the RFP (including 10-year detailed list of needs). Roth IAMS will provide sufficient data to allow for longer-term (full building lifecycle) forecasts in the event that a longer planning horizon is required in the future.

Roth IAMS will provide a traditional narrative report for the City, meeting the criteria in the RFP but will also provide a consolidated dataset in Excel format for all of the in-scope buildings, which can easily integrate into its existing Asset Management software and tools.

Roth IAMS only considers a project successful when the data we provide aligns with a client's existing organizational goals and objectives and enables them to tell a data-driven Asset Management Story to its various stakeholders (Council, Staff, Residents, Community Partners, etc.).

3.2 FACILITY CONDITION ASSESSMENT METHODOLOGY

Roth IAMS is pleased to provide the City with the following scope of work designed to meet, and in some cases exceed the requirements of the RFP.

Having completed over 25,000 FCAs, our team has developed a series of project management tools and procedures to support our team and clients in the successful completion of FCA projects. The following sections provide details of these recommended processes.

3.3 PROJECT MANAGEMENT

Roth IAMS recognizes the criticality of Project Management (PM) to the success of any portfolio assessment project. Demonstrating our commitment to PM, Roth IAMS has created the Project Management Office (PMO), which is responsible for the oversight of all Roth IAMS projects throughout North America. In collaborating with the PMO, the City

can be confident that its project will be led by an experienced industry veteran with experience both completing and managing FCA projects.

3.3.1 Project Kick-Off

We recommend that an in-person project kick-off meeting (virtual) be scheduled with key stakeholders from the City as well as our Project Manager at the outset of the project. The purpose of this meeting will be for all the stakeholders to meet via an online platform, to outline the City's detailed objectives for the project; and ensure an understanding of the steps that will be part of project execution.

3.3.2 Collaboration

One of the founding principles of Roth IAMS is Collaboration. To accurately capture the condition of the City's assets, we engage with the knowledgeable staff from the client's organization during the process, beyond providing someone to open locked doors and escort them through the facility. Although this does take more time for both our clients and our staff, in our experience, it results in a more useful end-product for the client.

One of the greatest issues associated with facility and asset management today is that many organizations have staff that house tremendous knowledge of their buildings within their heads. As those experienced staff prepare to retire, the organizations face a tremendous risk if that unique knowledge walks out the door with them leaving.

Throughout our project methodology we focus on collaborating with our clients to provide as much opportunity as possible to extract that institutional knowledge from the minds of our client's staff. This collaboration informs and supports the FCA/clients, which in turn provide a more solid foundation for an on-going asset management program.

We exhibit the collaborative approach through:

- Project Kick-Off Meeting;
- Completion of a pilot-level program followed by a client review and debrief;
- Interviews with knowledgeable building and facility staff;
- Engaging our site escorts throughout the site visit; and
- Integration of client-provided comments and feedback throughout the project.

3.3.3 Contact Information

Roth IAMS will prepare a Project Team Contact sheet for distribution to City representatives as well as the Site Assessment team which will include cell phone numbers and email addresses.

3.3.4 File Sharing

Roth IAMS will establish a secure web-based platform (OneDrive) for the sharing of documentation from the City as well as for transferring Draft and Final Reports. A file structure will be established at the outset of the project that will ensure ease of file sharing between our teams.

3.3.5 Regular Project Update Calls

Roth IAMS recommends at minimum monthly project update calls, which in general will be conducted using Teams, Zoom or other web conferencing software to create a virtual collaborative workspace.

3.3.6 Wrap-Up/Report Out Meeting

Following the completion and acceptance of the final reports, Roth IAMS will schedule a meeting with key City stakeholders to review the project, discuss any items that should be considered during future related work and share lessons learned.

3.4 FACILITY CONDITION ASSESSMENTS

The FCA will generally be performed in accordance with the requirements of the ASTM Standard E2018-24: Standard Guide for Property Condition Assessments.

Uniformat II is the de facto industry standard for building system nomenclature and includes the following detailed asset breakdown:

- A - Substructure;
- B – Building Shell;
- C - Interiors Construction;
- D – Mechanical & Electrical Services;
- E – Equipment & Furnishing;
- F – Special Construction & Demolition; and
- G - Building Sitework.

Roth IAMS is a champion of the Uniformat II (ASTM Standard E1557 – Standard Classification for Building Elements and Related Sitework). Over 85% of the 25,000 FCAs that our project team has personally been involved in were completed using the Uniformat II nomenclature system.

3.4.1 Documentation Request and Review

Roth IAMS will provide a background document request to the City outlining the list of information, if available that will support the project.

If hard copies (or hard drive) of the documentation are available, our team will collect them during the Kick-Off Meeting. Alternatively, if digital versions of the information are available, we can create a project-specific secure site to allow for the efficient sharing and distribution of the relevant project information.

Upon receipt of the available relevant information from the City, our Project Manager will distribute the documents to the assessors for each specific site. The assessors review the information prior to visiting each site to provide a familiarity with the buildings.

3.4.2 On-Site Activities

3.4.2.1 Knowledgeable Staff Interviews

It is critical to the successful completion of this project that our assessors can interview City staff members that are familiar with the operations and maintenance of each facility. This helps to ensure the most accurate data is collected on the building systems, their operations and history. This interaction allows our assessors to integrate the institutional knowledge that resides in the “heads” of critical site and building staff, providing better recommendations for proposed renewal events. Any questions arising during the Documentation Review will also be addressed with the appropriate contact as well.

The format and timing for the interviews will depend upon how the City’s facility team is structured and will be confirmed during the project Kick-Off Meeting. Roth IAMS will work collaboratively with the City to determine the format that is the most efficient for staff and most effective for supporting our collaborative approach. Ideally if we are able to set-up a meeting where our team can sit down with staff and go through the buildings in advance of the site visit we have found this method to work best. It is also beneficial to ask questions following the site visit based on items observed during the assessment that may have not been discussed in the interview.

3.4.2.2 Site Walk-Through

Our site assessors, ideally accompanied by an escort from the City’s team, will complete a walk-through of each building and site consisting of our assessors visually observing: the roof, the exterior of the building(s), common areas, mechanical and electrical rooms/vaults, washrooms, and a sampling of the operational spaces within each building to check the performance of the building systems and confirm representative condition.

Our team will work with our escorts to limit the disruption to the on-going site operations. All site visits will be scheduled on weekdays between 8:00 AM and 4:30 PM, however if any of the buildings are open outside of these hours, some of the public areas may be easier to assess outside of these hours, when there are less occupants around.

3.4.3 Reporting

The Roth IAMS team will provide the information outlined in the Section 3.3 of the RFP, including reports at 50%, 75% and 100% completion. This approach to draft review is more typical for design projects and not FCAs. We confirm that if successful that we will work with the City to create a workflow that aligns with the requirements. Leveraging the SLAM CAP software the City will be able to review Roth IAMS draft reports/data on-line within the SLAM CAP software (training will be provided) as opposed to the traditional preparation of 100 plus page draft PDF reports. Our clients tell us that this process streamlines the client feedback process and provides greater communication between our assessment teams and knowledgeable staff within our client’s teams.

The Uniformat II ASTM E 1557 Standard Classification for Building Elements and Related Sitework), which is the industry’s de facto standard to classify elements, will be used to track the systems observed. The description will address the element/component

location, and, where provided, the nameplate information (manufacture, model no., serial no. year of manufacture, etc.).

Our experienced team members have developed and utilized hundreds of FCA report templates over the past 30 years. We do not provide an off-the-shelf or software-driven report format that we require our clients to utilize. Leveraging the power of the SLAM CAP software that we will be using to complete an FCA scope of work we will collaborate with the City to configure a report format that is in alignment with your business objectives and processes.

By leveraging the customizability of our Report Builder within the software platform that we will be using to generate our reports, we are easily able to modify our format to meet the City's project-specific reporting requirements, however, on request we can provide you with a sample redacted report.

Additionally, Roth IAMS will provide a consolidated dataset of the FCA data for all of the City's in-scope facilities. We will leverage SLAM CAP's flexible reporting engine and work with the City to determine the preferred format and layout of the consolidated dataset. If the City licenses facility asset management software, we can configure our dataset to allow for seamless integration of the FCA data.

3.4.3.1 Digital Photographs

Digital photographs of each building/asset along with specific element photographs will be provided in the FCAs to support the observed conditions and recommendations. For each recommendation that is more accurately described with visual representation, a digital photograph will be included to help identify and locate the element.

3.4.3.2 Condition Rating

Each element will be classified based on the condition observed and the estimated remaining useful life. At the onset, we recommend that the condition rating be defined to allow for consistent application across multiple buildings and based on multiple assessors. Roth IAMS will work with the City's stakeholders during the Kick-Off Meeting to develop a condition rating scale. For example: Critical (immediate); Poor (year 2); Fair (years 3-5); Good (years 6+); and does not meet current codes/standards.

3.4.3.3 Recommendation Type

Each recommendation will be assigned one of the following types that provide details on the type of recommendation that is being made:

- **Engineering Study** – a proposed engineering study (e.g. roof cut tests, infrared scanning) to more accurately diagnose an issue that cannot be determined based on visual assessment only.
- **Major Repair** – repair or replacement of subcomponent (e.g. motors) of a component for the express purpose of extending the useful life of the component/system;

- **Lifecycle Replacement** – replacement of a component/system based on reaching its expected useful life (typically beyond the first 10-years of the evaluation period). This may also include system refreshment recommendations such as, but not limited to seal coating of asphalt; painting, pointing, or sealant replacement for exterior finishes; painting of interior finishes; or replacement of elevator cab finishes.

3.4.3.4 Costing Recommendations

Roth IAMS does not recommend relying solely on standard cost guides such as RS Means, and Marshall and Swift to provide the budget costs for the repair and renewal events provided in our FCAs. We will employ our own internal estimated unit cost document, using these standard cost guides, regional factors and our own experience, as well as client-specific pricing as available (records of recent repairs, replacements, upgrades, etc.). We will review our proposed unit cost schedule and associated regional factors during the proposed Kick-Off Meeting and integrate any City-specific costs. Our team's assessors would then employ the unit cost schedule when preparing the cost estimates for each recommended repair/replacement in the FCA reports.

3.4.3.5 Facility Condition Indices (FCIs)

SLAM CAP will be configured to provide City with one or more FCI calculations for each building based on City-provided Current Replacement Values. Should CRVs for the buildings not exist, Roth IAMS can collaborate with City to develop a methodology for calculation (additional costs may apply depending on the method of CRV calculation). FCI is the de facto industry standard for benchmarking facility condition across a large portfolio of assets.

$$\text{FCI} = \frac{\text{Renewal Needs in a Given Period of Time} \times 100}{\text{Current Replacement Value}}$$

Roth IAMS recommends that clients use a 5-Year FCI for its portfolio and asset planning as single year FCIs tend to fluctuate greatly from one year to the next, depending on the annual renewal needs. A 5-Year FCI focuses on the long-term trend and tends not to fluctuate as much, making long-term planning easier and more effective. However, SLAM CAP provides the opportunity to have multiple FCIs over different time periods (e.g. 1-Year, 5-Year, etc.).

3.4.3.5.1 Sum of the Parts Current Replacement Value (CRV) Calculation

In the event that CRVs are not available, the SLAM CAP software will automatically calculate a CRV for each building, based on the sum of the Elements Replacement Costs (Sum of the Parts Methodology) for the building elements created as part of the FCA.

The section below outlines an alternate methodology that Roth IAMS could utilize to develop CRVs for the City in the event that the Sum of the Parts methodology is not preferred.

3.4.3.5.2 Marshall and Swift CRV Calculation

Should the City wish to utilize a methodology based on an industry recognized cost guide, Roth IAMS can also calculate the cost to reconstruct the building using the Marshall & Swift Valuation Cost Guide. However, this method has an additional cost, beyond that quoted in our proposal of \$150/building to account for the time required to build the CRVs using the cost guide.

The Marshall & Swift is designed to integrate the building data (labour, material and installation of the building components) to provide estimates for the reconstruction of the building. The 'Calculator Method', where the average cost of the building floor area (per square meter or square foot) will be advanced, will form the platform to estimate the building base cost. The Class of Construction (non-combustible construction, fire-resistant construction, combustible construction, etc.), the Quality of Construction (excellent, good, average, and low cost) and the Occupancy Type (Administration, Service, Educational, etc.) will be used to select the building base cost. The base cost will be further refined and adjusted to address the type of heating and cooling, elevators, and fire suppression systems (sprinkler system). Also considered in the final analysis and CRV estimate will be nuances such as size and shape, height of building, and number of stories.

The cost guide is widely used by appraisers to determine improvements and the replacement value of buildings.

3.5 INFRARED THERMOGRAPHY

Infrared Scans (IR Scans), thermal imaging or temperature profiling of a surface or a point is currently being used by building owners and operators as either a preventive or predictive maintenance measure to check the condition and performance of building systems and to initiate work orders, when required. Thermal images help detect anomalies that are potential weakness in the building envelope or a hot spot at an electrical component/system. The anomalies that otherwise cannot be observed with the naked eye, lead to repairs, which when addressed in a timely manner minimize further deterioration.

Thermal imaging assessments are non-destructive and non-contact inspections that reveal the internal condition or the internal process of a building component or system. Our assessment reports present an IR Scan image, which profiles the temperature range of an area surface, adjacent to the visible-light photo of the component or system.

Roth IAMS has trained staff to complete IR Scans of building component/systems. We use a thermography camera with a 24° lens manufactured by FLIR to undertake the assessment and the analysis. When performed concurrent with an FCA, the analysis is used to predict the remaining useful life and to either advance or defer the renewal of a building component.

The IR Scans, when performed on energized electrical components or systems, inform the building operators of potential hot spots or anomalies with the component. The temperature difference (ΔT) between the ambient and the hot spot is compared to a guideline to initiate an action to either immediately repair (clean or replace) or closely monitor the electrical component.

IR Scans completed on a building exterior wall system or roof system determine heat loss. On the roof systems, the analysis of the temperature difference (ΔT) between roof sections indicates possible areas of wet roof sections and dry roof sections, given that saturated roof sections are better heat conductors or indicate lower thermal resistance. On exterior wall systems, the ΔT help identify areas of heat loss (poor insulation, failure of wall sealants, etc.).

3.6 DRONE ROOF ASSESSMENTS

With the use of an unmanned aircraft system (UAS) or drone, Roth IAMS has the equipment and staff to provide aerial images of site features or roof sections that are not readily accessible with the use of a hatch or fixed ladder. Roth IAMS is able to carry out drone operations as regulated by the Federal Aviation Administration (FAA)'s Small UAS Rule (Part 107) and for selective buildings. If advanced drone operations are required or the use of a UAS is extensive, Roth IAMS will typically procure the services of a sub-consultant to complete the work.

3.7 ASSET GEOLOCATION

The SLAM CAP software that Roth IAMS is proposing to use to provide the FCAs, and which can be licensed by the City beyond the project timeline provides a geolocation (based on Latitude and Longitude based on the Civic Address of each asset).

This data can be integrated into the City's current ESRI database. Roth IAMS can provide a flat-file (Excel or CSV) that can easily be imported into ESRI, along with the desired Asset data the City wishes to store and view in their GIS system.

With regards to geolocation using ESRI within facilities, Roth IAMS is willing to work with the City if we are selected as the successful proponent. However, the RFP documents and subsequent addenda did not provide sufficient detail to provide a fixed fee to complete the work. As such, Roth IAMS will collaborate with the City to develop a scope of work for any internal geolocation and provide a cost estimate once the scope has been finalized.

3.8 QUALITY ASSURANCE

Roth IAMS employs a proven approach to QA/QC that has been used successfully by our team members on numerous portfolios similar to the City's and is outlined in the following sections.

3.8.1 Preparation of a Project-Specific Instruction Manual

Where the project portfolio includes different facilities (administration, recreation, utility, service, etc.) and the project assessment team involves more than one assessor, Roth IAMS, to ensure consistency across the portfolio, prepares a Project-Specific Instruction Manual (PSIM).

The PSIM:

- Discusses in detail the approach to data capture and upload to SLAM CAP;
- Defines to help assessors' opinions on the asset element condition structure (good, fair, poor), renewal needs (replace, repair, engineering study), and priorities (life safety, structural integrity, etc.);
- Explains, to provide dependable renewal costs, asset element the unit costs, and the application of difficulty factors, regional factors and soft costs; and
- Includes, for coherence between assets, Uniformat II classification asset element hierarchy, which is established and finalized in collaboration with the City.

The PSIM, which is drafted at the outset of the project, is refined to include the City's comments from the Pilot Program.

The PSIM will also include the City's Project Management contact information, nuances with site access and health and safety protocols required during the site visits.

3.8.1.1 Initial Assessor Training

Each assessor will attend a training meeting led by the Project Manager and DLs. Training will occur after the completion of the proposed Pilot-Level Program, and prior to the full project roll-out. The purpose of the training will be to present the scope of work and to ensure an understanding of the specific information required for completion.

In addition, Roth IAMS will provide details of overall project requirements for protocols during the completion of the site visits and will review the PSIM that will be created for this project.

3.8.1.2 Desktop QA/QC by Design Discipline Leaders

Each FCA report will be submitted by the assessor to the DLs assigned to the project. The DLs collectively have over 40 years of experience conducting, managing and reviewing FCAs.

Upon completion of the desktop QA/QC process, a digital copy of the draft report will be submitted to the City. Comments received from the City will be reviewed by our DLs and the appropriate site assessor(s) and approved revisions will be made.

Any major changes to the overall standard wording or assessment protocols that are requested by the City through this process will be distributed to all assessment teams.

3.8.1.3 Pilot-Level Program

Roth IAMS normally recommends that a pilot-level program be undertaken at the outset of any portfolio project. The pilot program consists of the complete assessment and reporting on a sample of buildings from the subject portfolio. Undertaking the full scope of work on a representative sample of buildings will allow the City to experience the proposed project steps and to provide feedback on the draft reports early in the process. Any changes resulting from the pilot are then implemented prior to the full-scale project roll-out. For the project Roth IAMS recommends completing the pilot immediately following the kick-off meeting.

3.9 SCHEDULE

Roth IAMS has created a proposed high-level schedule which is included in **Appendix 2**. We recognize and acknowledge the City's requirement that 50% draft, 75% and 100% (final) reports will be submitted to the City for review based on the RFP documents and subsequent addendum. However, that workflow tends to be more associated with design projects and not FCAs. FCAs include reporting on all of the elements within the building based on agreed upon data fields.

We are uncertain whether the City wants us to submit 50% of the required element data as part of the initial review or all of the element data for 50% of the assets. We have created the schedule following our traditional report delivery model, which include the completion of a draft report for all of the elements observed within a facility for City review and feedback. Based on the City's terminology we would consider that a 100% draft report. Based on the feedback from the City we will revise the draft and if there are significant changes can resubmit a revised draft for review. However, in completing thousands of FCAs each year, we find that less than 1% of our reports have a second client review requested.

If Roth IAMS is the successful proponent, we will revise our project schedule to reflect the City's desired cadence of draft report submission once we have a better understanding of it, given its unconventional nature as it is related to FCAs.

Please note that we have also had to include additional time to facilitate the three recommended reviews. Should the City take the more traditional approach to report reviews, Roth IAMS can lower the costs quoted herein.

During the proposed Kick-Off Meeting, we will review any limitations on scheduling for each building and integrate them into our proposed implementation plan. Roth IAMS will provide an updated and detailed building by building project schedule, following our proposed Kick-Off Meeting.

The schedule has taken into consideration staggering delivery of the reports for the City to review in order not to overwhelm staff reviewing the reports so that the final versions can be completed on time.

3.10 CURRENT WORKLOAD

Roth IAMS has the capacity to undertake the scope of work outlined in the RFP document. We are one of North America's largest firms focusing exclusively on the collection of consistent and defensible data on existing buildings. As such, we have more capacity of staff uniquely specialized in FCAs than any other Florida based firm.

Additionally, Roth IAMS has a 10-year track record of being able to on-board professional site assessment staff efficiently and effectively when securing additional contracts. This has been proven by our expansion from a sole practitioner in 2014 to a team of over 100 staff located in over 40 cities across North America. Any additional staff that might be added to the City's project would first be vetted and approved by City staff.

3.11 AVAILABLE RESOURCES AND TECHNOLOGICAL CAPABILITIES

As we have stated several times throughout our submission, Roth IAMS core business is providing public sector clients with consistent and defensible FCA data to help tell their asset management story. As such, over the past 10 years, Roth IAMS has developed a detailed toolkit that we bring to bear on each FCA project to tailor our solutions to meet each individual client's project needs. These tools include:

- Project-Specific Instruction Manual;
- Detailed Uniformat II Element Data Structure;
- Unit Costing and Expected Useful Life (EUL) Standards;
- Staff Training Documentation;
- Project Management Tools and Templates;
- Senior Technical Review Guidelines and Documentation; and
- and much more.

To streamline the application of these tools, Roth IAMS utilizes the SLAM CAP software which automates the consistency tools that are outlined above and allows our trained assessors to focus their experience and efforts on diagnosing the condition of each building element as opposed to having to try to remember the Uniformat code, Unit Cost or EUL for a specific element, SLAM CAP does that for the assessor.

Further details on SLAM CAP are provided below. Please note that for the purpose of this response, our baseline scope of work will provide the City with access to SLAM CAP for the duration of the FCAs, to provide on-line review of our draft assessments.

3.12 SLAM CAP SOFTWARE

Should the City wish to consider it, SLAM CAP can be licensed beyond the completion of the FCA contract to provide the City with the ability to visualize the data, prepare custom and standard reports, develop prioritized multiyear capital plans and keep its FCAs up-to-date based on completed capital projects. Additionally, the SLAM CAP mobile app can also be used by City staff to complete future internal FCAs.

All regularly planned updates that occur over the license period will be included in the license fee. Additionally, SLAM CAP is licensed with unlimited users so the City can add as many users as it wishes over the license period. Training and support for new users is also included in the license fee.

Roth IAMS is a licensed reseller of SLAM software. SLAM Technologies Ltd. was co-founded by Bill Roth, the President & CEO of Roth IAMS, and the proposed Principal-in-Charge of our project team.

SLAM CAP is Roth IAMS' in-house platform for providing FCAs to clients without an existing CAMS system. As such, we have assessed hundreds of buildings using the CAP software and methodology.

3.12.1 SLAM Background

SLAM was founded because existing Capital Asset Management Software (CAMS) platforms were very rigid in their configuration and unnecessarily complicated. Our founders' vision was to create a platform that is:

- Easy to use and intuitive;
- Configurable to meet a client's specific needs, processes, terminology;
- Easily able to share data within and across other software platforms; and
- Provided best-in-class functionality for data collection and on-going asset management.

Since 2018, Roth IAMS has worked in collaboration with over 60 clients in North America to implement SLAM CAP. In each case, Roth IAMS was providing the FCAs for the buildings and through our reseller agreement, or by facilitating a license directly with SLAM, our end client licensed SLAM CAP to support their on-going capital planning and data management.

There are number of important things that separate us from the competition and have allowed SLAM to become one of the fastest growing facilities management applications in North America. A series of screenshots providing an overview of the general functionality of SLAM CAP have been included in **Appendix 3**.

As it is difficult to demonstrate and explain dynamic software in a static text format, we welcome the opportunity to provide the City with an on-line or in-person demonstration of SLAM CAP to prove that SLAM CAP is the right CAMS for the City.

Working closely with a range of facility management stakeholders, SLAM has been designed to simplify and streamline the process of facility asset management. Our clients have discovered the advantages of managing facility operations from an easy-to-use and easy-to access SLAM application, including:

- Increased facility management productivity;
- Improved project collaboration;
- Enhanced customer service;

- Easier planning and prioritization of capital renewal planning activities;
- Enhanced tools and wizards to streamline on-going data management;
- Reduced opportunity for human error; and
- Significant IT and personnel savings.

As a vendor-hosted, cloud-based solution, SLAM modules can be accessed by an unlimited number of users through any standard web-enabled device, including smart phones and tablets. SLAM modules have been designed with all levels of technical competence in mind and share a consistent look and feel, so that users learn to navigate their way through the system quickly and confidently. Complimentary on-site training, webinars and in-software learning tools ensure any user questions are addressed promptly.

3.12.1.1 User Engagement

SLAM is a highly configurable system, which means as we receive feedback and suggestions from our clients, we use it to improve everyone's experience. These software changes are distributed to clients immediately, ensuring you always benefit from the most up-to-date version.

3.12.1.2 SLAM CAP Module

This proposal focuses on providing the City with Access to the SLAM CAP module. All FCA data collected by Roth IAMS will be uploaded into a City-Specific URL (e.g. fortlauderdale.slamtechnologies.com or whatever URL is preferred), allowing the City to take advantage of all of the SLAM features.

The City will have the ability to leverage and configure our Reporting, Key Performance Indicator and Planning functionality to enhance its existing facility and asset management program.

3.12.1.3 All-Inclusive Pricing Model

It is critical to note the benefits of our all-inclusive pricing model. For an all-inclusive yearly subscription expense, SLAM provides both technology and services to guarantee a successful implementation and operation of your SLAM applications.

The following items are included for the duration of your contract, and are among the many advantages of our business model:

- Application setup, configuration and installation;
- Unlimited user licenses;
- Unlimited upgrades and product versions immediately as they are released;
- Unlimited software maintenance;
- Unlimited training time, both on-site and via tele- or web-conference;
- Unlimited access to training documentation;
- Unlimited technical support via our Help Desk;

- All strategy, planning and implementation meetings; and
- Total access to all functions of the proposed software.

SLAM offers additional savings as our web-hosted software requires no substantial hardware, set-up services or costly annual updates. Users access their tailored modules through standard web-browsers, which eliminates the need for system upgrades when functionality needs change. You'll pay only for the modules you require, and should those needs change over time, our Software-as-a-Service model (SaaS) lets you easily add or remove modules.

3.12.1.4 *Software-as-a-Service (SaaS) Subscription Agreement*

Should the City consider licensing SLAM CAP, Roth IAMS has provided our standard SaaS Subscription document included in **Appendix 4**. In many cases, our users will sign the agreement in addition to the standard professional services contract. However, Roth IAMS is also willing to work with the City to integrate mutually agreeable terms similar to those in the subscription agreement into a baseline contract with the City.

3.12.1.5 *Key SLAM CAP Technical Features*

Roth IAMS is pleased to provide the following key features of SLAM CAP that most of our higher education clients are looking for in a CAMS:

- Unlimited User license model allows for deep integration with the client staff;
- Unlimited User Training for each level of user is included in the annual license fees;
- Cloud-based software that is fully hosted, browser agnostic and allows for Single-Sign-On access without requires any additional or proprietary software installation;
- 99.9% uptime based on our US-based data centre and servers which are monitored 24/7/365 and maintained on a regular basis;
- Helpdesk is available from 8:00 to 5:00 Monday to Friday and is provided by internal Client Success Coordinators (CSCs);
- On-Line help is available to all users including documentation and video instruction;
- Built-in Data Consistency tools that drive consistency and defensibility of asset data;
- Secure, Client-Configured Permissions which drive who can see what data (buildings, software functionality) and what they can do with it (read/write access);
- An audit trail of assessment data allowing the client to view the evolution of specific building elements over time and across multiple assessments;
- The system includes a rich custom field editor that can easily be configured to export in existing reports throughout the system;
- Import/export tools that allow the client to bring in existing data, and extract SLAM CAP data for integration with Computerized Maintenance Management Systems (CMMS) and other IT systems used;

- Ability to configure multiple Facility Condition Indices, based on the time horizon and specifically what Elements are included, and provide multiple funding scenarios to the client to demonstrate the impact of various levels of funding; and
- Flexible and configurable reporting engine that allow for easy extraction of specific data from the system as well as user-defined report development through the Report Builder functionality.

3.12.2 Capital Planning Functionality

3.12.2.1.1 Future Funding Needs

In addition to the FCI Funding Scenario KPI, SLAM CAP also provides an Unfunded Liability KPI as part of our out-of-the-box functionality. The Unfunded Liability also provides the opportunity to apply the same funding levels as the FCI graph so clients can see the impact of different funding scenarios over time as it relates to FCI as well as Deferred Maintenance Backlog. The time horizon for the FCI Funding Scenario and Unfunded Liability is 10-Year as part of our standard configuration. However, it can be adjusted to 30-Years or longer during initial software configuration.

3.12.2.1.2 Building Projects and Applying Funding

SLAM CAP provides clients with an extremely flexible Project creation tool that allows for the assignment of specific Recommendations to a Project. Projects can be built based on specific buildings, budget types, disciplines, etc.

Through the Projects functionality each project can be assigned one or more budget types (configured based on client's financial system), a purchase order and/or a GL code. Projects can also be completed over a single year, or over multiple fiscal years. Upon completion of a Project, the Element and Recommendation level information is updated through an easy-to-use Wizard that allows for partial or full replacement of an Element, and automatic updating of the preexisting Element Data as well as the creation of new Element information for the newly installed Element.

3.12.2.1.3 Prioritization of Renewal Projects

Facility projects can be broken down into single large-scale recommendations or to be broken down into smaller recommendation tasks. These tasks contain key information for dates, budgets as well as funding streams. A large number of these tasks can be grouped into a variety of containers using the planning builder.

Additionally, SLAM CAP has Multivariable Prioritization functionality built-in that will allow client's to build a decision support calculation that will provide a numerical priority for each recommendation. Should the City license SLAM CAP, we will train staff to create and MVP within the SLAM CAP software. Should the City wish Roth IAMS to facilitate a stakeholder engagement session to develop the MVP, additional charges may apply.

3.12.2.1.4 Unique Data Management Tools

As capital projects are completed, SLAM CAP includes a series of data management tools and wizards that streamlines the process of keeping the client's data up-to-date. Upon completion of a Task, the user has the ability to split, merge or replace an Element depending on the work that was completed (partial or full replacement). Additionally, completing a Major Repair allows the user to adjust the condition and Remaining Useful Life of an Element to reflect the improvement to the Element as a result of the work completed. Our data management tools will eliminate multiple manual steps when compared to other CAMS on the market today, making it easier and more efficient to manage the FCA data throughout the license period.

3.12.2.2 Data Visualization – KPI Dashboard

A picture is worth a thousand words. In facility asset management, a picture, based on consistent and defensible data is worth millions of dollars. To help client's tell its asset management story to its stakeholders, we have designed the KPI dashboard, which allows clients to customize and create a wide range of graphs to visualize their data.

Data can be visualized based on several different datasets including by Building, by Element, by Unifomat Level, etc. Through the SLAM CAP KPI dashboard, we can configure real-time graphical formats based on the client's desired reporting formats. The format for the KPIs is as configurable as the Custom Fields that you can easily apply at the Asset, Building, and Recommendation level. Setup of a client's KPIs can be completed as part of the software implementation.

3.12.2.3 Prioritized Multiyear Capital Plan

Based on the FCA data collected and merged into SLAM CAP, the client will be able to report on a list of capital renewal needs for its entire portfolio, by campus or by individual building over whatever future time horizon that is desired. As we are gathering an element-level inventory for each building we can project as far into the future as a client wishes. Additionally, SLAM CAP will allow a client to include cyclical renewals (if desired) in longer (typically 20 years or more), which will provide costs to do multiple replacements of an element over a planning horizon (where the EUL of the element is less than the planning time frame).

4 REFERENCES

Roth IAMS is pleased to provide the City with details of several recently completed FCA projects, similar in scope and scale to the current RFP. The project information includes client reference names and contact information.

Roth IAMS Relevant FCA Project Experience - Project No. 1	
Project Name	Facility Condition Assessments / Net Zero Energy Assessments
Client Name	City of Corona

Client Contact	Name: Moses Cortez Address: 400 South Vicentia, Corona, CA 92882 Phone: 951-739-4998 Email: moses.cortez@coronaca.gov
Project Dates	September 2023 - Ongoing
Project Budget	\$187,430.50
Key Staff Involved	Bill Roth, Curtis Loblick, Tammy Ward, Osama Zreik, Jake Stauffer, Kevin Klemme
CAM Software Utilized	SLAM CAP
Project Description (Scope, Objectives, Constraints, Deliverables)	
Roth IAMS was retained by the City of Corona (the City) to conduct facility condition assessments (FCAs) on 20 municipal buildings (640,000 SF) including community centers, park buildings, libraries, and an airport. Building on the success of the existing project, the City requested additional scope be added to the project, to deliver FCA's and Zero Net Energy assessments for 7 Fire Stations and one Fire Training Tower (112,000 SF). Using visual sampling techniques, Roth IAMS was able to describe, technically assess, and provide opinions as to the existing condition of structural, mechanical, electrical, interior, site, and building envelope systems. A reporting format was established which allowed Roth IAMS to take advantage of the efficiency gains using SLAM CAP software to assist with the data collection on site and report generation. Once the final report was approved an upload table was generated for ease of import into the City's asset management program, PeopleSoft GIS.	

Roth IAMS Relevant FCA Project Experience - Project No. 2	
Project Name	Facility Condition and American Disabilities Association Assessment (ADA) Assessments
Client Name	SNO-ISLE Libraries
Client Contact	Name: Rose Hong, Facilities Manager Address: 7312 – 35 th Ave. NE, Marysville, WA 98271 Phone: (360) 913-8879 cell Email: Rhong@sno-isle.org
Project Dates	2023, 2024
Project Budget	\$56,000 (2023), \$17,200 (2024)
Key Staff Involved	Bill Roth, Paul Robson, Kyle Christensen, Andrew Chow
CAM Software Utilized	SLAM CAP
Project Description (Scope, Objectives, Constraints, Deliverables)	
To understand the capital and maintenance renewals needs of their 20 assets, the SNO-ISLE Libraries initiated in 2023, an ambitious Asset Management program which included completing in a one year period, the Facility Condition Assessments (FCAs) and American Disabilities Association Assessment (ADA) of all their assets. In 2023 the data was captured on our Capital Asset Management (CAM) SLAM using electronic handheld devices. The asset element data was prioritized based on element observed condition, and a budget cost (Class D estimate) to address the renewal was provided. The ADA assessments, which were assessed concurrent with the FCA, were reported on an ADA checklist, also uploaded to our Capital Asset Management (CAM) SLAM using electronic handheld devices. The assets assessed ranged in size (between 3,000 and 37,000 SF) and included the community libraries in the Snohomish County area in Washington State, Capturing the architectural, mechanical, electrical components, observed deficiencies and the ADA information in our Capital Asset Management (CAM) SLAM using electronic handheld devices within the allotted site time. Our ability to meet the SNO-ISLE expectations was realized in the extension of the scope in 2024 to include another 7 libraries.	

Roth IAMS Relevant FCA Project Experience - Project No. 3	
Project Name	Facility Condition Assessments and Capital Asset Management Software
Client Name	University of Minnesota
Client Contact	Name: Andrew Chan, Portfolio Management Program Manager Address: 1049 University Drive, Duluth, MN 55812 Phone: (612) 625-4931 Email: chan0391@umn.edu
Project Dates	Fall 2022 to Present (5-Year Contract)
Project Budget	Approximately \$650,000 annually
Key Staff Involved	Bill Roth, Kyle Christiansen, Abdel Hamed Hassan, Kari Morgan
CAM Software Utilized	SLAM CAP
Project Description (Scope, Objectives, Constraints, Deliverables)	
The University of Minnesota (UMN) had previously completed FCAs and implemented a Capital Asset Management System (CAMS) for their multiple campuses throughout the state. In 2022, the decision was made to go back to the market to seek a partner to collaborate with over a 5-year period. Roth IAMS was selected, including the implementation of the SLAM CAP CAMS to support UMN in evolving its facility and infrastructure asset management program. The scope of work for the condition assessments was expanded to also include the Central Utility Buildings as well as the underground site infrastructure. Roth IAMS collaborated to configure UMN's SLAM CAP portal to allow for migration of existing FCA data from its former CAMS software. Pilot building data was migrated originally to allow our team to map the migration process. Following the pilot all of the UMN buildings were migrated into SLAM to allow UMN to begin leveraging SLAM's data visualization and capital planning functionality for all buildings, even though the FCAs will occur over a multiyear period. Roth IAMS completed a Pilot-Scale program on the Duluth Campus in late 2022 to allow UMN and our team to test our assumptions and validate the data migration from their previous CAMS. In collaboration with UMN, Roth IAMS has scheduled out all of the FCAs to be completed by the end of 2025, ahead of the initial 5-year schedule. Roth IAMS has assessed the subsurface infrastructure across all campuses, which was not included in the previous FCA project. UMN also recently added the assessment of the network of underground tunnels as well as all in-tunnel infrastructure to our scope of work.	

As the project continues, Roth IAMS will be looking to configure the Multivariable Prioritization into UMN's SLAM CAP database, and also look for ways to integrate with their Computerized Maintenance Management System. With the FCA program hitting its stride, Roth IAMS and UMN will begin to look at integrating the FCA data with UMN's Computerized Maintenance Management System later in 2023 as well.

Roth IAMS Relevant FCA Project Experience - Project No. 4	
Project Name	Facility Condition Assessment Program
Client Name	University of Southern Mississippi Coastal Operations
Client Contact	Name: Lucas A. Applewhite, PMP, CEFM; Interim Director of Facilities Planning and Management, Coastal Operations Address: 703 East Beach Drive, Ocean Springs, MS 39564 Phone: 228.818.8019 Email: Lucas.Applewhite@usm.edu
Project Dates	Winter 2022 to Present
Project Budget	\$25,000 (2022), \$151,000 (2023)
Key Staff Involved	Bill Roth, Joel Mooney, Abdel Hamed Hassan, Norman Lobo, Detlev Grad
CAM Software Utilized	SLAM CAP
Project Description (Scope, Objectives, Constraints, Deliverables)	
Like many higher education institutions across the United States, the Coastal Operations team and the University of Southern Mississippi (USM Coastal) has struggled to build and maintain the momentum required to define and address its growing Deferred Capital Renewal and Maintenance (DCRM) Backlog. USM Coastal partnered with Roth IAMS to provide a pilot-level Facility Condition Assessment (FCA) project, for all 54 of its buildings located across multiple campuses in along the Gulf Coast. Using SLAM CAP as the data collection and reporting tool, Roth IAMS staff provided USM Coastal with a full inventory of the elements present within the pilot buildings, as well as a forecast of future renewal needs for each element. In collaboration with USM Coastal, Roth IAMS customized the Uniformat II Level 4 data structure used to identify the elements. Unit costs were adjusted based on published regional factors for the USM's region. Traditional FCA reports were prepared for each building, including Opinion of Probable Cost Tables. In addition, USM Coastal was also provided with access to the SLAM CAP software during the period in which decisions regarding full-scale, portfolio-wide roll-out was being decided. Configuration of the SLAM CAP database was completed	

as well as initial user training and the Multivariable Prioritization has been programmed into SLAM CAP for USM to begin to leverage.

USM Coastal is in the process of integrating the FCA data and SLAM CAP into its internal deliberations regarding DCRM and Capital Planning, including engaging with senior leaders within the University to better understand the current needs of the pilot buildings, the planning capabilities and functionality provided by SLAM CAP, as well as considering next steps for a portfolio-wide implementation.

As a result of the work done on the Coastal Campuses, Roth IAMS has recently been awarded a contract for the main campus in Hattiesburg to provide similar services over the course of the remainder of the fiscal year 2023/2024.

5 MINORITY/WOMEN (M/WBE) PARTICIPATION

Roth IAMS fully supports the City's commitment to support minority businesses.

Roth IAMS is one of the few firms that focuses primarily on data collection for existing buildings across North America. After having completed over 25,000 FCAs, our team has developed training, policies, procedures and tools that allow us to provide consistent and defensible data to our clients. This can be demonstrated by the strength of our client references provided above, our 73 percent win rate on proposals in 2022, and the number of repeat clients that we have returning to us to provide additional services after our initial project.

We believe we are unable to find a minority partner that could provide the same level of quality data within similar amounts of time (and therefore fees) as our team of professional assessors.

There are also liability concerns with our staff conducting QA/QC (senior technical review) for site assessment staff of another firm. We would essentially be accepting the liability associated with the other firms' staff member's on-site work. Alternatively, we could have just given other firms complete FCAs to do (e.g. a few of the firehalls. However, at that point we would be introducing greater data variability as you would essentially have two or more firms completing different building for you. This process would have also introduced even higher fees to the project due to the reduction in economies of scale that would come by subdividing the portfolio, thereby reducing our competitiveness on the bid.

Overall, we did not feel that the benefits of engaging a minority business would result in the best possible outcome for the City in terms of the consistency and defensibility of the data, as well as the overall value for the significant investment that you are making by completing this project. If Roth IAMS becomes the successful proponent, we would be happy to discuss this process at the time of negotiations with City staff.

That being said, Roth IAMS does have relationships with Minority/Women owned businesses in Florida that we can partner with for this project should the City wish. However, additional fees would apply as above.

6 SUBCONTRACTORS

Roth IAMS has the resources to complete the full scope of work with our in-house staff and will not require sub-consultants for this project.

7 REQUIRED FORMS

All required forms are uploaded together under separate cover as is required in the bidding system.

8 FEES

Roth IAMS has provided the City with the requested lump sum fee for the scope of work outlined the RFP. Details of per/building breakdown can be provided if awarded this project as there wasn't a location to provide this on the website.

In the event that the City requests Infrared Thermography of Roof and/or electrical panels, an additional cost of \$0.131 per SF of Roof Area, \$0.115/SF of Building with a minimum charge for scan of building envelope and roof @ \$1,000; and \$36/electrical panel will be incurred with a minimum charge for scan of panels @ \$600. Please note that Roth IAMS will require City staff to open the electrical panels. If City staff are not available and Roth IAMS need to hire a contractor independently, additional costs will apply.

Should the City wish Roth IAMS to utilize one of its drones to conduct a visual assessment of a roof, an additional cost of \$0.053/SF of Roof Area with a minimum charge @ \$500 will apply for each roof assessed.

8.1 FEE ASSUMPTIONS

The fees provided are based on the following assumptions:

1. The fees for the facilities include all nominal disbursements including travel expenses;
2. The fees assume that the building sizes provided by the City represent a single building, and not multiple unique buildings at a location or on a site;
3. At the time of the scheduled site visit, the assessors will have full access to facilities, especially to the roof, and the mechanical and electrical rooms;
4. We've assumed one face-to-face meeting (kick-off meeting). The monthly progress meetings will be conference calls;

5. The use of the SLAM CAP software is limited to data capturing and report publication. Should the City desire to use the software to manage their assets, Roth IAMS will be pleased to discuss the terms of the licensing the software;
6. The costs provided assume that projects are awarded with a minimum of a full week's worth of site visits as opposed to one-off buildings;
7. Roth IAMS has included considerably more time to facilitate the 50%, 75% and 100% draft reviews by the City. Should the City defer to the more standard report review process (review of a draft report that includes all data for all elements observed within the building) cost savings can be achieved;
8. If electrical panels are to be opened, the panels will be opened by City staff;
9. Infrared scans and drone operations at a facility will be undertaken during the same trip as the FCA;
10. Inclement weather or unideal conditions may affect the ability to operate drones and/or conduct infrared scans of the building exterior. In such an event, change order requests for additional disbursements will be issued after the City's approval; and
11. It is assumed that the drones will be operated under the permissions provided by FAA Part 107 and will not require more advanced operations.

APPENDIX 1
LIST OF ASSESSMENT PROJECTS

Roth IAMS 5-Year History of FCA Projects - Completed and Active Projects			
No.	Client Name	Project Year	Total Contract Amount
1	University of Minnesota	2022 (On-Going)	\$1,841,458
2	Knox County Schools	2023 (On-Going)	\$883,770
3	Manitoba Housing and Renewal Corporation	2021	\$798,948
4	Government of Saskatchewan	2021	\$675,723
5	University of Saskatchewan	2021	\$653,804
6	Government of Saskatchewan, Ministry of SaskBuilds and Procurement	2022	\$642,735
7	City of Vancouver	2020	\$591,109
8	City of St. Catharines	2021	\$478,167
9	City of Saskatoon	2022	\$475,934
10	City of Calgary	2021	\$432,859
11	University of Regina	2020	\$395,505
12	City of Vancouver	2021	\$384,226
13	University of Guelph	2020	\$376,281
14	Regional Municipality of Wood Buffalo	2020	\$371,005
15	Company B	2022	\$361,869
16	Ontario Northland Transportation Commission	2021	\$356,435
17	Government of Saskatchewan, Ministry of SaskBuilds and Procurement	2021	\$318,870
18	University of Saskatchewan	2020	\$307,108
19	Toronto Metropolitan University	2023	\$261,527
20	Florida Agricultural and Mechanical University	2024	\$255,595
21	Government of Saskatchewan	2021	\$250,610
22	University of Guelph	2021	\$241,061
23	City of Vancouver	2022	\$221,900
24	York University	2021	\$221,743
25	The University of Western Ontario and Affiliates	2020	\$221,320
26	County of Bruce	2021	\$209,121
27	Elk Island Public Schools	2022	\$207,310
28	York University	2022	\$199,375
29	University of Toronto	2020	\$195,237
30	University of Toronto	2021	\$190,921
31	City of Corona	2023	\$187,431
32	The University of Western Ontario and Affiliates	2022	\$186,086
33	Trent University	2022	\$185,369
34	Queen's University	2020	\$160,000
35	University of Southern Mississippi - COASTAL OPERATIONS	2022	\$153,915
36	Town of Newmarket	2022	\$153,663
37	Corporation of the City of New Westminster	2022	\$153,100
38	City of Guelph	2019	\$151,755
39	Carleton University	2022	\$151,031
40	Government of Nunavut	2022	\$148,789
41	Lakehead University	2021	\$143,475
42	State of Maine Bureau of General Services	2022	\$141,718
43	Government of Saskatchewan, Ministry of SaskBuilds and Procurement	2022	\$141,488
44	Toronto and Region Conservation Authority	2021	\$140,656
45	McMaster University	2022	\$138,980
46	InnServices Utilities Inc.	2021	\$134,380
47	Civida	2021	\$129,892
48	City of Calgary	2021	\$128,256
49	Queen's University	2022	\$127,281
50	Government of Nunavut	2019	\$124,277
51	Alberta Beach	2020	\$122,661

Roth IAMS 5-Year History of FCA Projects - Completed and Active Projects			
No.	Client Name	Project Year	Total Contract Amount
52	Government of Nunavut	2020	\$122,176
53	Vassar College	2024	\$120,000
54	City of Barrie	2020	\$119,255
55	Alberta Infrastructure	2021	\$115,373
56	McMaster University	2020	\$113,138
57	Calgary Public Library	2021	\$112,145
58	Fleming College	2021	\$105,727
59	Confederation College	2019	\$105,037
60	Durham College	2019	\$103,430
61	Lakehead University	2020	\$102,882
62	Infrastructure Ontario	2022	\$102,053
63	McMaster University	2023	\$101,624
64	Township of North Dundas	2022	\$99,564
65	Centennial College	2020	\$98,987
66	George Brown College	2020	\$98,636
67	Toronto and Region Conservation Authority	2020	\$98,056
68	University of Guelph	2023	\$95,902
69	Seneca Polytechnic	2019	\$94,820
70	Town of Saugeen Shores	2023	\$89,334
71	Regional District of Fraser-Fort George	2023	\$89,144
72	University of Ottawa	2019	\$86,398
73	St. Clair College	2019	\$85,464
74	The Corporation of the City of Victoria	2019	\$85,135
75	Wilfrid Laurier University	2022	\$85,031
76	Wilfrid Laurier University	2020	\$83,842
77	City of Fort St. John	2021	\$81,931
78	Roth IAMS LLC	2021	\$81,130
79	Victoria University	2021	\$80,083
80	University of Guelph	2019	\$78,280
81	Infrastructure Ontario	2020	\$78,050
82	Government of Saskatchewan, Ministry of SaskBuilds and Procurement	2022	\$77,580
83	Cambrian College	2023	\$73,891
84	Northern College	2020	\$73,424
85	SNO-ISLE Libraries	2023	\$73,220
86	Conestoga College	2020	\$70,633
87	Brock University	2023	\$69,328
88	County of Lethbridge	2019	\$68,053
89	Capilano University	2021	\$67,825
90	Sault College	2020	\$67,582
91	City of Calgary	2019	\$66,700
92	Fanshawe College	2021	\$64,654
93	Government of Saskatchewan, Ministry of SaskBuilds and Procurement	2019	\$62,068
94	Peace River Regional District	2021	\$61,868
95	Fanshawe College	2020	\$61,460
96	Regional District of Fraser-Fort George	2020	\$61,440
97	Government of Nunavut	2022	\$61,265
98	University of Regina	2023	\$61,241
99	Government of the Northwest Territories	2021	\$61,171
100	Fanshawe College	2020	\$61,143
101	Infrastructure Ontario	2019	\$60,292
102	Fanshawe College	2023	\$60,114

Roth IAMS 5-Year History of FCA Projects - Completed and Active Projects			
No.	Client Name	Project Year	Total Contract Amount
103	Conestoga College	2019	\$59,933
104	Infrastructure Ontario	2022	\$58,690
105	Toronto Community Housing Corporation	2021	\$58,598
106	The Calgary Young Men's Christian Association	2023	\$58,278
107	Regional District of Central Kootenay	2022	\$57,800
108	Humber College	2020	\$57,419
109	City of Iqaluit	2022	\$57,078
110	Town of Stony Plain	2023	\$54,665
111	Laurentian University of Sudbury	2020	\$54,371
112	City of Vaughan	2022	\$54,350
113	Algonquin College	2023	\$53,672
114	Brock University	2020	\$52,658
115	Humber College	2020	\$52,173
116	Columbia Shuswap Regional District	2021	\$51,442
117	University of Ontario Institute of Technology	2021	\$50,822
118	District of Saanich	2022	\$50,000
119	City of Kelowna	2022	\$49,970
120	City of Mississauga	2020	\$48,500
121	Algonquin College	2020	\$48,479
122	Ontario Northland Transportation Commission	2021	\$48,390
123	Toronto Lands Corporation (TLC)	2022	\$47,500
124	University of Toronto Mississauga	2020	\$46,717
125	University of Toronto Scarborough	2020	\$45,454
126	Thinkspace Architecture Planning Design Ltd.	2020	\$45,234
127	City of Kelowna	2023	\$44,188
128	La Cite College	2020	\$44,017
129	Centennial College	2020	\$43,192
130	Mohawk College	2019	\$42,862
131	Mohawk College	2020	\$42,854
132	Loyalist College	2020	\$42,426
133	Mohawk College	2021	\$42,421
134	City of Calgary	2021	\$42,130
135	Niagara College of Applied Arts and Technology	2019	\$41,891
136	ORH	2021	\$40,628
137	Casino Rama	2022	\$40,100
138	Conestoga College	2021	\$39,532
139	Stetson University	2024	\$38,758
140	City of Kelowna	2022	\$38,188
141	Peace River Regional District	2021	\$38,125
142	Conestoga College	2022	\$37,779
143	City of Calgary	2023	\$37,511
144	Gov't of Manitoba Asset Management/Central Services Government buildings	2022	\$36,916
145	Town of Innisfail	2023	\$35,236
146	Columbia Shuswap Regional District	2020	\$35,118
147	Roth IAMS LLC	2022	\$34,600
148	Regina Public Library	2023	\$34,040
149	La Cite College	2020	\$33,973
150	Northern College	2020	\$33,646
151	Toronto Lands Corporation (TLC)	2019	\$33,315
152	University of Toronto Mississauga	2020	\$32,104
153	St. Lawrence College	2022	\$32,041

Roth IAMS 5-Year History of FCA Projects - Completed and Active Projects			
No.	Client Name	Project Year	Total Contract Amount
154	Niagara College of Applied Arts and Technology	2019	\$30,505
155	InnServices Utilities Inc.	2021	\$30,430
156	Seneca Polytechnic	2021	\$28,885
157	Fleming College	2023	\$28,881
158	City of Edmonton	2022	\$28,523
159	Loyalist College	2020	\$27,573
160	Algonquin College	2021	\$27,510
161	Algonquin Lakeshore Catholic District School Board	2020	\$27,058
162	Regional District of Central Kootenay	2021	\$26,020
163	City of Edmonton	2022	\$26,010
164	City of Calgary	2022	\$25,695
165	City of Edmonton	2022	\$25,523
166	Algoma University	2020	\$25,036
167	United Counties of Leeds and Greenville	2019	\$24,581
168	University of Ottawa	2021	\$23,233
169	City of Campbell River	2021	\$23,100
170	Municipality of Arran-Elderslie	2023	\$23,024
171	TransAlta Tri Leisure Centre	2023	\$22,940
172	City of Edmonton	2021	\$22,763
173	The Corporation of the City of Brantford	2023	\$22,571
174	Town of Innisfil	2022	\$22,400
175	Infrastructure Ontario	2021	\$21,867
176	Regional District of Central Kootenay	2021	\$21,344
177	University of Southern Mississippi - COASTAL OPERATIONS	2022	\$20,905
178	City of Dawson Creek	2022	\$20,613
179	Bouygues Energies & Services Canada Ltd.	2021	\$20,335
180	City of Dawson Creek	2021	\$20,168
181	St. Lawrence College	2019	\$20,081
182	Sudbury Catholic District School Board	2020	\$20,000
183	Sudbury Catholic District School Board	2020	\$20,000
184	Regional District of North Okanagan	2019	\$19,945
185	City of Edmonton	2022	\$19,700
186	Centennial College	2022	\$19,151
187	Queen's University	2021	\$19,150
188	Regional District of Central Kootenay	2020	\$18,945
189	District School Board of Niagara	2023	\$18,030
190	Regional Municipality of Wood Buffalo	2023	\$17,857
191	Corporation of The City of Niagara Falls	2023	\$17,625
192	The Corporation of the City of Vernon	2022	\$17,238
193	Town of Innisfail	2022	\$16,935
194	The Calgary Young Men's Christian Association	2022	\$16,905
195	City of Mississauga	2020	\$16,485
196	City of Mississauga	2020	\$16,000
197	Bruce-Grey Catholic District School Board	2020	\$14,785
198	Sudbury Catholic District School Board	2022	\$14,778
199	Strathcona County	2023	\$14,443
200	District of Mackenzie	2023	\$14,308
201	The Corporation of the City of Port Coquitlam	2023	\$13,838
202	St. Joseph's College, University of Alberta	2023	\$13,773
203	City of Edmonton	2022	\$12,973
204	Regional District of Central Kootenay	2022	\$12,939

Roth IAMS 5-Year History of FCA Projects - Completed and Active Projects			
No.	Client Name	Project Year	Total Contract Amount
205	Bellwood Centres for Community Living Inc	2021	\$12,673
206	City of Edmonton	2021	\$12,588
207	City of Iqaluit	2022	\$12,500
208	FCAPX Ontario Ltd.	2019	\$12,500
209	Loyalist College	2020	\$12,500
210	City of Calgary	2021	\$12,000
211	District of Mission on the Fraser	2021	\$11,895
212	Belvedere Heights Board of Management	2021	\$11,673
213	The Corporation of the City of Kingston	2023	\$11,550
214	Civida	2022	\$10,918
215	City of Calgary	2023	\$10,695
216	Mancal Property Holdings Inc.	2019	\$10,565
217	St. Clair College	2022	\$10,484
218	Saskatchewan Cancer Agency	2019	\$10,443
219	City of Calgary	2020	\$10,435
220	Cardel Rec South	2022	\$10,185
221	Woodbine Entertainment	2023	\$10,031
222	University of Southern Mississippi - COASTAL OPERATIONS	2023	\$10,000
223	Town of Saugeen Shores	2023	\$9,915
224	Gilmore Printing Services	2022	\$9,800
225	University of Toronto	2020	\$9,708
226	Genesis Centre	2022	\$9,370
227	Queen's University	2021	\$9,260
228	The Corporation of the City of Kingston	2019	\$9,150
229	FCAPX Ontario Ltd.	2019	\$9,000
230	Regional Municipality of Wood Buffalo	2022	\$8,670
231	Thinkspace Architecture Planning Design Ltd.	2023	\$8,395
232	The Corporation of the City of Victoria	2019	\$7,980
233	The Corporation of the City of Kingston	2019	\$7,700
234	Regional District of Central Kootenay	2022	\$7,253
235	The Ranchmen's Club	2023	\$6,990
236	County of Bruce	2022	\$6,895
237	Brock University	2019	\$6,690
238	County of Minburn No. 27	2022	\$6,673
239	Town of Oakville	2023	\$6,570
240	Toronto and Region Conservation Authority	2023	\$6,503
241	Brock University	2020	\$6,500
242	FCAPX Ontario Ltd.	2019	\$6,500
243	Strata Corporation LMS 49 - Devon Gate	2019	\$6,100
244	FCAPX Ontario Ltd.	2019	\$6,000
245	Sheridan College	2020	\$6,000
246	Yellowhead County	2019	\$5,843
247	Bouygues Energies & Services Canada Ltd.	2022	\$5,660
248	The Agency of Co-operative Housing	2019	\$5,650
249	Innovation Saskatchewan	2023	\$5,600
250	City of Edmonton	2022	\$5,233
251	Strata Corporation EPS 4644 – Sutherland	2019	\$5,000
252	Ausenco Sustainability Inc	2022	\$4,990
253	City of Calgary	2022	\$4,950
254	Internat Energy Solutions Canada Inc.	2021	\$4,900
255	Regional District of Central Kootenay	2023	\$4,885

Roth IAMS 5-Year History of FCA Projects - Completed and Active Projects			
No.	Client Name	Project Year	Total Contract Amount
256	Northern College	2023	\$4,780
257	Town of Stouffville	2023	\$4,400
258	FCAPX Ontario Ltd.	2019	\$4,200
259	Regional District of Central Kootenay	2020	\$4,200
260	The Agency of Co-operative Housing	2019	\$4,160
261	Town of Fox Creek	2019	\$3,990
262	Dundas Valley School of Arts	2022	\$3,450
263	Town of Innisfil	2023	\$3,300
264	CT REIT GP CORP	2021	\$3,220
265	Civida	2023	\$3,015
266	Niagara College of Applied Arts and Technology	2020	\$2,987
267	FCAPX Ontario Ltd.	2019	\$2,600
268	City of Calgary	2021	\$2,500
269	FCAPX Ontario Ltd.	2019	\$2,500
270	Lac Ste Anne County	2019	\$2,460
271	Alberta Beach	2019	\$2,045
272	George Brown College	2020	\$2,000
273	University of Toronto Mississauga	2021	\$1,800
274	Loyalist College	2021	\$1,500
275	Centennial College	2020	\$1,379
Total FCA Revenue since 2019			24,290,907.99

APPENDIX 2

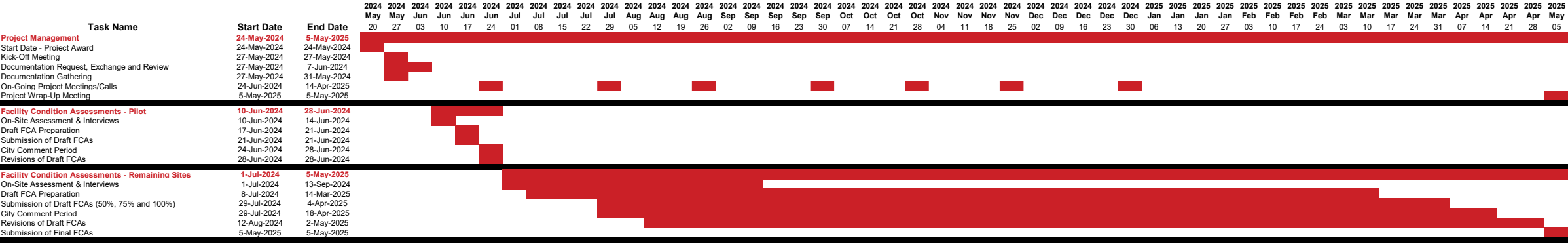
PROPOSED SCHEDULE

Roth IAMS Proposed Schedule

for

City of Fort Lauderdale

Proposal No. P24019



APPENDIX 3

SLAM CAP SCREENSHOTS

This document will provide some general overview screenshots demonstrating SLAM CAP's functionality as it relates to our Client's requirements.

Asset Overview

Screenshot of the Asset Dashboard showing:

1. User Defined Tag based filters
2. Ability to Map Buildings Based on the Civic Address
3. Current Fiscal Year for Funding and Planning Purposes
4. Mapping Functionality
5. Client-Defined FCI value by building

Also note that most columns across the Dashboard are sortable and that SLAM is mobile enabled so all screens will be right sized on mobile devices.

Facility No	Name	Address	City	Area	Floors	Year Constructed	Regional Factor	Imported Asset Id	Investment	3 Year FCI
243	1 College Ave West	1 College Ave West	Guelph	279	3	1900	0.93573	029-AST-17953	\$823,412.50	4.3%
156	11 University Ave. East Garage	11 University Avenue East	Guelph	32	1	1926	0.93600	029-AST-365	\$121,495.00	16.2%
111	11 University Avenue East	11 University Avenue East	Guelph	311	2	1926	0.93600	029-AST-5475	\$1,059,716.00	10.2%
20	1294 Balmoral	1294 Balmoral Street	Thunder Bay	2589	4	1994	1.07712	030-AST-5454	\$15,588,765.69	1.2%
143	193 Albert St.	193 Albert Street	Waterloo	480	3	1950	1.01028	032-AST-18395	\$0.00	-
1	2018_03031 Storm Distribution		St. Catharines	1		1972	1.01800	027-AST-13398	\$13,483,411.55	118.3%

Custom Columns/Views

Screenshot showing user-defined options for column views that exist at the Asset, Element, Recommendation and Assessment level.

Default Columns	Include in List View
Flags	☒
ID	☐
Facility Number	☐
Name	☒
Description	☐
Address	☐
City	☒
Province	☐
Postal Code	☐
Country	☐
Latitude	☐
Longitude	☐
Phone	☐
Website	☐
Email	☐
Area	☒
GFA Footprint	☐
Floors	☐
Basement Levels	☐
Year Constructed	☒
Ownership Type	☐
use	☐

Client-Defined Asset Tags

The screenshot below shows the user-defined Asset Tags and Tag Sets (Become Filters for Viewing, Reporting and KPIs). Tags are used to organize Assets into higher groupings like Organization, Campus, Region, etc.

Tag	Tag Set	Actions
No tag set		
All		Delete
Retired		Delete
Community		Edit Delete
Test 2		Delete
Condition		Edit Delete
1 - Good		Delete
2 - Repair		Delete
3 - Replace		Delete
Department		Edit Delete
Emergency Services		Delete
Parks & Recreation		Delete
Public Works		Delete
Water/Wastewater		Delete

The screenshot below shows an example of two Asset Tag sets providing dynamic filtering capabilities on data dashboards.

Presets

- East ES and P & R
- East P & R

Filters

- Zone
 - East
 - West
- Department
 - Emergency Services
 - Parks & Recreation
 - Public Works
 - Water/Wastewater
- Condition

Maintaining History of Changes

The screenshot below shows an example of how all changes to the data within SLAM CAP are logged and visible by users, allowing for greater understanding of data over time and provides additional risk management in the event that something was changed accidentally.

History

FCAPX Admin
2019-12-19 17:08:58
174.95.67.70

Quantity changed from '16,338' to '300'

Condition set to '2 - Good'

Condition Narrative set to 'The bridge is in good condition overall, no deficiencies were observed or reported.'

Difficulty Factor changed from '1.00' to '3.00'

Renewal Cost changed from '\$4,074,370.44' to '\$224,442.00'

Imported Element Id changed from 'SYS-251442' to ''

Audit Trail and Recommendation History

The screenshot below shows the Assessment Audit Trail that allows users to see the results of previous Assessment completed on an Element, and a Recommendation History showing Completed and Active Recommendations.

Element #196 5 / 875

Element

Asset: C Building

Uniformat Code: B202001 - Windows

Descriptor: Exterior windows

Description: The buildings exterior windows are aluminum framed with insulating glass.

Last Assessed: -

Last Merged: Jan 6, 2020

Installation Year: 1972

Assessments

Status	Assessor	Condition	Assessment Date	Renewal Year	Recommendations
P	David Neufeld	4 - Poor	Jun 25, 2020	2022	1
M	Osma,il Ali	4 - Poor	Oct 15, 2019	2022	0

Recommendations

Status	Descriptor	Year	Type	Qty	Cost
C	Reseal Windows	2019	Major Repair	0	\$50,000.00
A	Windows	2022	Life Cycle Replacement	780	\$900,558.75

Data Management Wizards

The screenshot below shows one of the data management wizards that allows users to optionally update Element information when completing non-Replacement (e.g., Engineering Studies and Repairs), streamlining data management and ensuring data integrity over time.

Complete Task

In addition to completing the current task, you may also optionally make changes to the element, recommendation or any other tasks on the recommendation as follows:

Complete the Recommendation

This is the final active task on the recommendation, would you like to complete the recommendation as well?

☐ Complete Recommendation

Review Remaining Recommendations

By completing this task, other existing recommendations on the same element may become invalid or require updates in order to properly reflect the new condition of the element.

Would you like to redirect to the element view upon complete in order to review the remaining recommendations?

☐ Redirect to Element

Update the Element

Asset: C Building

Element ID: 196

Element: Exterior windows

Installation Year: 1972

Expected Useful Life: 30 Years

Expected Renewal: 2002 Year

Flags: None

Condition: 4 - Poor

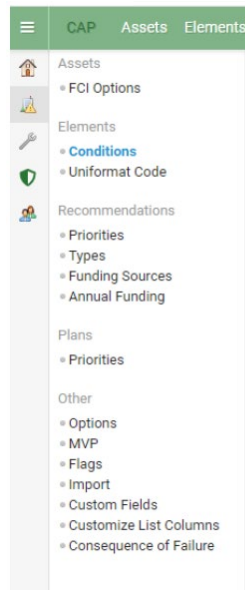
Condition Narrative: The windows have aged and have broken seals, lifecycle replacement is recommended.

Remaining Useful Life: 0 Years

Renewal Year: 2022

Extensive Configuration Options

The screenshot below provides an overview of the extensive Configuration Options within SLAM CAP including FCI (multiple time horizons), Condition Rating, Priorities, Funding Sources and Annual Funding Levels.



Extensive user configurability for all areas of the database. Your own URL allows for you to configure SLAM CAP how you want it without worrying about sharing a database with other organizations.

Multivariable Prioritization

SLAM CAP includes Multivariable Prioritization that allows each client to define their own priority categories, create ratings, scores and weightings that result in a numerical priority value created automatically for each Recommendation. Categories are applied at the Asset-Level (comparing Building A vs. Building B), the Element Level (Comparing Uniformat Codes against each other) and based on the Element Condition Rating (Unique for each Element in each Asset).

Each client-defined sub-category is given a score demonstrating the relative importance of each sub-category in the group.

Customize MVP Categories		
Categories		
Name	Score	Action
Condition (System)	-	Edit
5 - Missing/Failed	100	Edit
4 - Poor	90	Edit
3 - Fair	60	Edit
2 - Good	20	Edit
1 - Excellent	10	Edit
Consequence of Failure (System)	-	Edit
Fire / Life Safety	100	Edit
Partial Campus Shutdown	95	Edit
Full Building Closure	90	Edit
Partial Building Closure	40	Edit
Program Interruption	20	Edit
Nuisance	5	Edit
None	1	Edit

Each client-defined category is weighted out of 100 demonstrating the relative importance of each category when compared to the others.

Balance Category Weights

Condition 50

Consequence of Failure 30

Energy Savings Potential 10

Use of Building 5

Enabling User Experiences 5

Total 100

Save Cancel

The screenshot below shows the Asset MVP categorization wizard that scores each asset on the Asset-Specific Categories.

Edit Asset MVP Categories

Use of Building Academic

Enabling User Experiences Significant: Used nearly 100%

Save Cancel

This screenshot shows the MVP dashboard based on the Unifomat Categories.

Unifomat Codes Search			
☐ Code	Name	Consequence of Failure	Energy Savings Potential
☐ A	Substructure	Full Building Closure	None
☐ A10	Foundations	Full Building Closure	None
☐ A1010	Standard Foundations	Full Building Closure	None
☐ A1020	Special Foundations	Full Building Closure	None
☐ A1030	Slab on Grade	Partial Building Closure	Low
☐ A20	Basement Construction	Full Building Closure	None
☐ A2020	Basement Walls	Full Building Closure	None
☐ B	Shell	Full Building Closure	Medium
☐ B10	Superstructure	Full Building Closure	Medium
☐ B1010	Floor Construction	Full Building Closure	None

Detailed Planning Platform

SLAM has a Planning dashboard that allows clients to quickly and easily create Tasks against Recommendations and use Allowances to build their capital plan right in SLAM, making project tracking spreadsheets obsolete. Tasks allow clients to split Recommendations over multiple years or different funding sources.

Plan

Plan Number: 001
 Name: 2021/2022 Capital Renewal
 Priority: High
 Est. Completion: Dec 31, 2022
 Date

Initial est. Total Cost: \$335,000.00
 Estimated Total Cost: \$916,280.00
 Actual Total: \$50,000.00
 Created by: PCAPX Admin

Tasks

Asset	Fac ID	Uniformat Code	Recommendation Name	Task #	Status	Year	Coverage	Funding Source	Initial Estimate	Estimated Cost	Actual Cost
Brace Laboratory	049	C302004	Vinyl Tile	1	3	2021	55%	Annual Capital Renewal	---	\$275,180.00	---
Scott Residence Hall	609	B202001	Major Repair	7	3	2021	---	Capital Maintenance	\$15,000.00	\$15,000.00	\$17,000.00
Brace Laboratory	049	C302004	Vinyl Tile	6	3	2022	47%	Capital Maintenance	\$540,000.00	\$540,000.00	\$0.00
Architecture Hall West	66	C302005	Carpet	4	3	2021	---	Annual Capital Renewal	---	\$35,000.00	\$42,000.00

Allowances

Name	Description	Status	Year	Funding Source	Estimated Cost	Actual Cost
Asbestos Abatement	Annual Allowance for Asbestos abatement associated with potential renewal projects	3	2021	Capital Maintenance	\$40,000.00	---

Funding Summary

Source	Task Count	Estimated Cost	Actual Cost
Annual Capital Renewal	2	\$11,280.00	\$42,000.00
Capital Maintenance	2	\$605,000.00	\$17,000.00

Allowances allow you to include costs that are not associated with a specific element.

Split tasks between multiple years or budgets.

Data Management wizards allow for extensive data updating at the Element Level when completing Tasks associated with Recommendations, ensuring accuracy of data over time.

Preview Split

Completing this task will create a new element from the recommendation's original element. The quantity listed on the task will be removed from the original element. **All selected splits will be retired. This process cannot be reversed.**
 You may optionally change the following features of the new element.

Original Element #313

Asset: Brace Laboratory
 Uniformat Code: C302004 - Vinyl Tile
 Descriptor: Vinyl Tile Flooring
 Description: The building's floor finish includes asbestos containing vinyl tiles.
 Year Installed: 1972
 Expected Useful Life: 15 Years
 Expected Renewal: 1987
 Remaining Useful: -34 Years
 Renewal Year: 1987
 Quantity: 46220 SF (-2294 on Complete)
 Unit Cost: \$11.15
 Factors: 1.5, 1.00000, 1.2
 Difficulty: Regional, Soft Cost
 Element Cost: \$927,635.40

New Split Element

Flag: None
 Asset: Brace Laboratory
 Uniformat Code: Filter
 Descriptor: C302004 Vinyl Tile
 Description: The building's floor finish includes asbestos containing vinyl tiles.
 Year Installed: 2021
 Expected Useful Life: 15 Years
 Expected Renewal: 2036
 Remaining Useful: 15 Years
 Renewal Year: 2036
 Quantity: 2294 SF
 Unit Cost: \$11.15
 Factors: 1.5, 1, 1.2
 Difficulty: Regional, Soft Cost
 Element Cost: \$46,040.56

We know that capital renewal is complicated. Our intuitive wizards remove numerous manual steps that allow you to easily maintain data integrity during on-going data management. Automatically create new Elements during complete or partial replacement.

The screenshot below shows the Funding Summary at the top of the Planning dashboard which allows clients to enter user-defined Funding Sources and Annual Funding Levels. The Summary allows users to see how much of each funding source, by year, has been included in their Plans for both estimated budget and actual spend.

Funding Source	2021	2022	2023	2024	Total
Annual Capital Renewal	\$311,280.00 / \$7,500,000.00	\$0.00 / \$10,000,000.00	\$0.00 / \$7,500,000.00	\$0.00 / \$7,500,000.00	\$311,280.00
Capital Maintenance	\$145,000.00 / \$4,000,000.00	\$614,400.00 / \$5,500,000.00	-\$1,560,000.00	-\$1,560,000.00	\$695,400.00
Alumni Donations	\$15,000.00 / \$300,000.00	\$0.00 / \$650,000.00	\$0.00 / \$650,000.00	\$0.00 / \$500,000.00	\$15,000.00
Total	\$571,280.00	\$614,400.00	-	-	\$1,185,680.00

Summaries allow you to have a real-time view of how you are allocated each unique, user-defined funding source. Provides data for both Estimated (planned amount) and Actual (final project costs).

User-Defined Flags at all Data Levels

Each client portal includes unlimited user-defined flags that allow clients to easily find and filter for data at the Asset, Element, Recommendation and Assessment level.

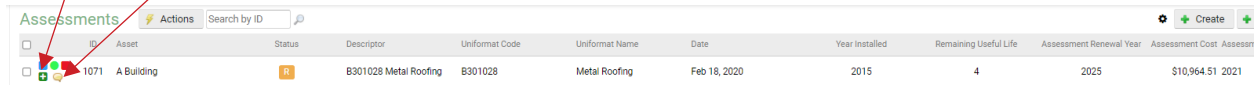
Asset		+ Add
Name		Enabled
Nothing to display		
Element		+ Add
Name		Enabled
Amanda - Review		✓
Mark - Review		✓
Needs Photo		✓
Requires Update		✓
Recommendation		+ Add
Name		Enabled
20-Year Plan		✓
Planning		✓
Study		✓
Assessment		+ Add
Name		Enabled
Corrected		✓
On-Going Comment from Assessor		✓
Refer to Arch Structural		✓
Refer to Electrical Dept		✓
Refer to Mech Dept		✓
Reviewed - Assessor Discussion Needed		✓
Reviewed - No Comments		✓

Each flag is filterable at the appropriate level of the database. The screenshot below demonstrates a sample of Assessment Flags and the associated filters.

Flags

☐ Corrected
☐ On-Going Comment from Assessor
☐ Refer to Arch Structural
☐ Refer to Electrical Dept
☐ Refer to Mech Dept
☐ Reviewed - Assessor Discussion Needed
☐ Reviewed - No Comments
☐ Has Comments

The screenshot below demonstrates how multiple flags can be used for a datapoint. Additionally, it demonstrates two automated flags that are created for Assessments added by a third-party assessor and the presence of Comments associated with an Assessment (used to assist in on-line report reviews).



Assessments	ID	Asset	Status	Descriptor	Uniformat Code	Uniformat Name	Date	Year Installed	Remaining Useful Life	Assessment Renewal Year	Assessment Cost	Assessor
	1071	A Building		B301028 Metal Roofing	B301028	Metal Roofing	Feb 18, 2020	2015	4	2025	\$10,964.51	2021

User/Profile Management

The screenshot below demonstrates the ability to assign multiple profiles which control the permissions for each user within SLAM CAP.

DetailsFacilitiesProfilesFiles

Ayden Townsend

Profiles

Name

Description

CAP Admin

Equip Manager

Portal Manager

Prevent Manager

Actions

Switch to

Copy

Edit

Delete

Edit profiles

Permission Summary

Roles

SLAM

Client admin - Facilities (CAP Admin, Portal Manager)

Client admin - Users (CAP Admin, Portal Manager)

Actions

CAP

Access (CAP Admin)

Admin (CAP Admin)

Assessor (CAP Admin)

Config (CAP Admin)

Element View (CAP Admin)

Recommendation View (CAP Admin)

Reports (CAP Admin)

The screenshot below demonstrates how users can be assigned access to specific buildings organized by user-defined Asset Tags (Client-define grouping of buildings) or by individual building.

Facilities for Ayden Townsend

Tags

Common

All

Retired

Community

Test 2

Condition

1 - Good

2 - Repair

3 - Replace

Department

Emergency Services

Parks & Recreation

Police Services

Public Works

Water/Wastewater

Zone

East

West

Allowed

A Building

B Building

C Building

D Building

E Building

F Building

G Building

H Building

I Building

J Building

K Building

Denied

Sample facility

Apply

Cancel

Hand-Held Application

In addition to the on-line portal, SLAM also has a handheld APP that allows for on-site, off-line data collection of FCA data.

The screenshot displays the 'Edit Assessment #1133' screen. It features a side-by-side comparison of two assessment records. The left record is for 'Element #195 Details' and the right is for 'Assessment Details'. Both records are for 'Exterior windows' and show a 'Condition' of '2 - Poor'. The left record has a 'Last Assessed' date of 'Jan 6, 2020' and a 'Year Installed' of '1972'. The right record has an 'Assessment Date' of 'Jun 25, 2020' and a 'Year Installed' of '1972'. Both records show an 'Expected Useful Life' of '30' and an 'Expected Renewal Year' of '2002'. The 'Renewal Year' is '2022'. The 'Remaining Useful Life' is '1'. The 'Unit Cost' is '\$65.03' and the 'Unit Cost' is '\$65.03'. The 'Quantity' is '0,396' and the 'Quantity' is '780'. The 'Unit Cost' is '\$65.03' and the 'Unit Cost' is '\$65.03'.

Assessments are completed using our Off-Line App that works on iOS and Android.

All data but narratives collected on-site increasing accuracy and completeness of dataset

Side-by-side view of previous data and new assessment

Locked fields prevent assessors from editing calculated or locked data

The SLAM APP allows for easy linking of photos with Assessments on-site while standing in front of the equipment.

The screenshot displays the 'Edit Assessment #1133' screen. A 'Choose' dialog box is overlaid on the screen, showing two options: 'Photos' and 'Camera'. The 'Photos' option is selected. Below the dialog box, there is a 'Photos' section with two photo thumbnails. The 'Additional' section is also visible, showing a 'Quantity' of '780' and a 'Unit Cost' of '\$65.03'. The 'Renewal Year' is '2022' and the 'Remaining Useful Life' is '1'.

Photo capture occurs right on-site. Increases accuracy, photo quality and efficiency of assessment.

Ability to add photos from your camera roll as well if needed.

The following screenshot shows the addition of Allowances to the Planning functionality within SLAM CAP, below the tasks that are associated with specific Recommendations.

Plan

Plan Number 001

Name 2021 Capital Renewal

Priority High

Est. Completion Date Dec 31, 2021

Initial Est. Total Cost \$978,352.50

Estimated Total Cost \$1,980,847.50

Actual Total \$2,742,000.00

Created by FCAFX Admin

Actions

Tasks

Asset	Rec ID	Unformat Code	Recommendation Name	Task #	Status	Year	Coverage	Funding Source	Initial Estimate	Estimated Cost	Actual Cost
D Building	249	C302004	Vinyl Tile	1	A	2021	53%	Operating Budget	-	\$670,995.00	-
I Building	596	B301023	Conventional - Single Ply Membrane	9	C	2021	-	Capital Budget	\$607,500.00	\$607,500.00	\$650,000.00
B Building	96	C302005	Carpet	4	C	2021	-	Capital Budget	-	\$36,000.00	\$42,000.00
B Building	41	B301026	Inverted - Single Ply Membrane	13	C	2021	-	Capital Budget	\$151,875.00	\$151,875.00	\$1,750,000.00
K Building	659	B301026	Inverted - Single Ply Membrane	20	C	2021	-	Capital Budget	\$150,727.50	\$150,727.50	\$175,000.00
H Building	525	B301028	Metal Roofing	12	C	2021	-	Capital Budget	\$68,250.00	\$113,750.00	\$125,000.00

Manage

Allowances

Name	Description	Status	Year	Funding Source	Estimated Cost	Actual Cost
Asbestos Abatement		A	2021	Operating Budget	\$150,000.00	-
Parking Maintenance	Patching	A	2021	Capital Budget	\$100,000.00	-

Add

The screenshot below provides the input screen for an Allowance demonstrating the options that each user has in creating an Allowance, including assigning it to a client-define funding source, picking the year to budget for and providing an Estimated Cost.

Add Allowance

Save Cancel

Allowance

Name

Description

Funding Source - Choose -

Year - Choose -

Estimated Cost

The screenshot below demonstrated the addition of the Major Changes filter to the Assessment dashboard allowing clients to focus in on areas where major changes occurred from previous data.

ID	Asset	Status	Descriptor	Uniformat Code	Uniformat Name	Date	Year Installed	Remaining Useful Life	Assessment Renewal Year	Assessment Cost Year
1204	A Building	Reviewed (R)	Standard Foundations	A1010	Standard Foundations		2012	2	2023	\$390,764.85 2021
1210	A Building	Reviewed (R)	Bridge to MC Building	B1010	Floor Construction		2012	5	2026	\$221,480.00 2021

The following two screenshots demonstrate the highlighting of specific data fields where the latest assessments changed the previous assessment data. As opposed to most other CAMS systems, SLAM CAP retains an audit trail of previous assessments for each element so clients can see the evolution of the condition of an element as opposed to only seeing current assessment data.

Assessment #1210

Reviewed 2 / 2

None
Previous
Copy
Close

Assessment year currently set to 2021

Element #3 Details

Asset A Building

Descriptor Bridge to MC Building

Uniformat Code B1010

Uniformat Name Floor Construction

Description The bridge to the MC Building is a steel framed structure with composite steel deck and concrete floor and steel roof deck. Its exterior walls are comprised of four-sided structural silicone curtain wall with insulated glazing units, some with fritted glass. Its roof is comprised of standing

Condition 2 - Good

Condition Narrative The bridge is in good condition overall, no deficiencies were observed or reported.

Last Assessed

Assessment Details

Assessor eBase Administrator

☐ To be Retired

Descriptor Bridge to MC Building

Uniformat Code B1010

Uniformat Name Floor Construction

Description The bridge to the MC Building is a steel framed structure with composite steel deck and concrete floor and steel roof deck. Its exterior walls are comprised of four-sided structural silicone curtain wall with insulated glazing units, some with fritted glass. Its roof is comprised of standing

Condition 3 - Fair

Condition Narrative The bridge is in fair condition overall, minor deficiencies were observed or reported.

Condition 2 - Good Condition Narrative The bridge is in good condition overall, no deficiencies were observed or reported. Last Assessed _____ Year Installed 2012 Expected Useful Life 75 Years Expected Renewal 2087 Year Remaining Useful 66 Life Years Renewal Year 2087 Quantity 300 SM Building Unit Cost \$253.12 Factors 3 1.25000 1 Difficulty ⓘ Regional ⓘ Soft Cost ⓘ Element Cost \$284,760.00 Additional _____	Replacement costs are for roofing and interior finishes. Condition 3 - Fair Condition Narrative The bridge is in fair condition overall, minor deficiencies were observed or reported. Assessment Date _____ Year Installed 2012 Constructed in 2012 Expected Useful Life 75 Years Expected Renewal 2087 Year Remaining Useful 5 Life Years Assessment 2026 Renewal Year Quantity 350 SM Building Unit Cost \$253.12 Factors 2 1.25 1 Difficulty ⓘ Regional ⓘ Soft Cost ⓘ Assessment Cost \$221,480.00
--	--

The screenshot below provides an example of our Import Tool wizard that allows users to easily Map data from an existing spreadsheet to the appropriate SLAM data field. Automapping provides AI that will streamline the process and reduce the number of clicks. Imports are available at the Asset, Assessment, Element and Recommendation level within SLAM.

File Import Wizard

+

 Auto Map

📄

 Import

✖

 Cancel

Select a Sheet

Sheet1

Import Type

Asset

📄

 Choose File

13_14_element_import.xlsx

Asset Field	Column Header
- Choose an Import Field -	Site ID
- Choose an Import Field -	Site Name Long
- Choose an Import Field -	Building Number
- Choose an Import Field -	Building Name
- Choose an Import Field -	Building Area
- Choose an Import Field -	Building Year
- Choose an Import Field -	Life Cycle ID
- Choose an Import Field -	System Name
- Choose an Import Field -	Unifomat Description
- Choose an Import Field -	Level5 Unifomat Number
- Choose an Import Field -	Comments
- Choose an Import Field -	LC Priority Id
- Choose an Import Field -	System Description Note
- Choose an Import Field -	Sub System Type

The following screenshot demonstrates the dynamic filtering functionality, autofill in search fields for filters and the ability to save Preset filter sets.

The screenshot displays a user interface for filter management. It is divided into two main sections: 'Presets' and 'Filters'.

Presets: A list of saved filter sets. One preset, 'East Zone, Parks and Rec Roofing', is highlighted in blue. A red arrow points to this preset with the text: 'Client-defined Presets allow for easy retrieval of commonly used filters'.

Filters: A section for applying filters. It includes several expandable/collapsible categories:

- Zone:** A dropdown menu with 'East' selected. A red arrow points to this selection.
- Department:** A dropdown menu with 'Parks & Recreation' selected. A red arrow points to this selection.
- Condition:** A dropdown menu.
- Asset:** A dropdown menu.
- Uniformat Code:** A dropdown menu with 'B3010' selected. A red arrow points to this selection.

Below the 'Uniformat Code' dropdown, a list of options is visible, each with a checkbox:

- ☐ B3010
- ☐ B301005
- ☐ B301006
- ☐ B301021
- ☐ B301022
- ☐ B301023
- ☐ B301024
- ☐ B301025
- ☐ B301026
- ☐ B301027

Two red arrows originate from the text 'Dynamic Filters Adjust the selectable options based on previously selected filters'. One arrow points to the 'East' selection in the 'Zone' dropdown, and the other points to the 'Parks & Recreation' selection in the 'Department' dropdown.

A red arrow points from the text 'Search fields within filters autofill based on the text entered' to the 'B3010' text in the 'Uniformat Code' dropdown.

The screenshot below demonstrates what a Single-Sign-On (SSO) login screen will look like.

Third parties would login by clicking the Use Offline Account link show in the screenshot below.

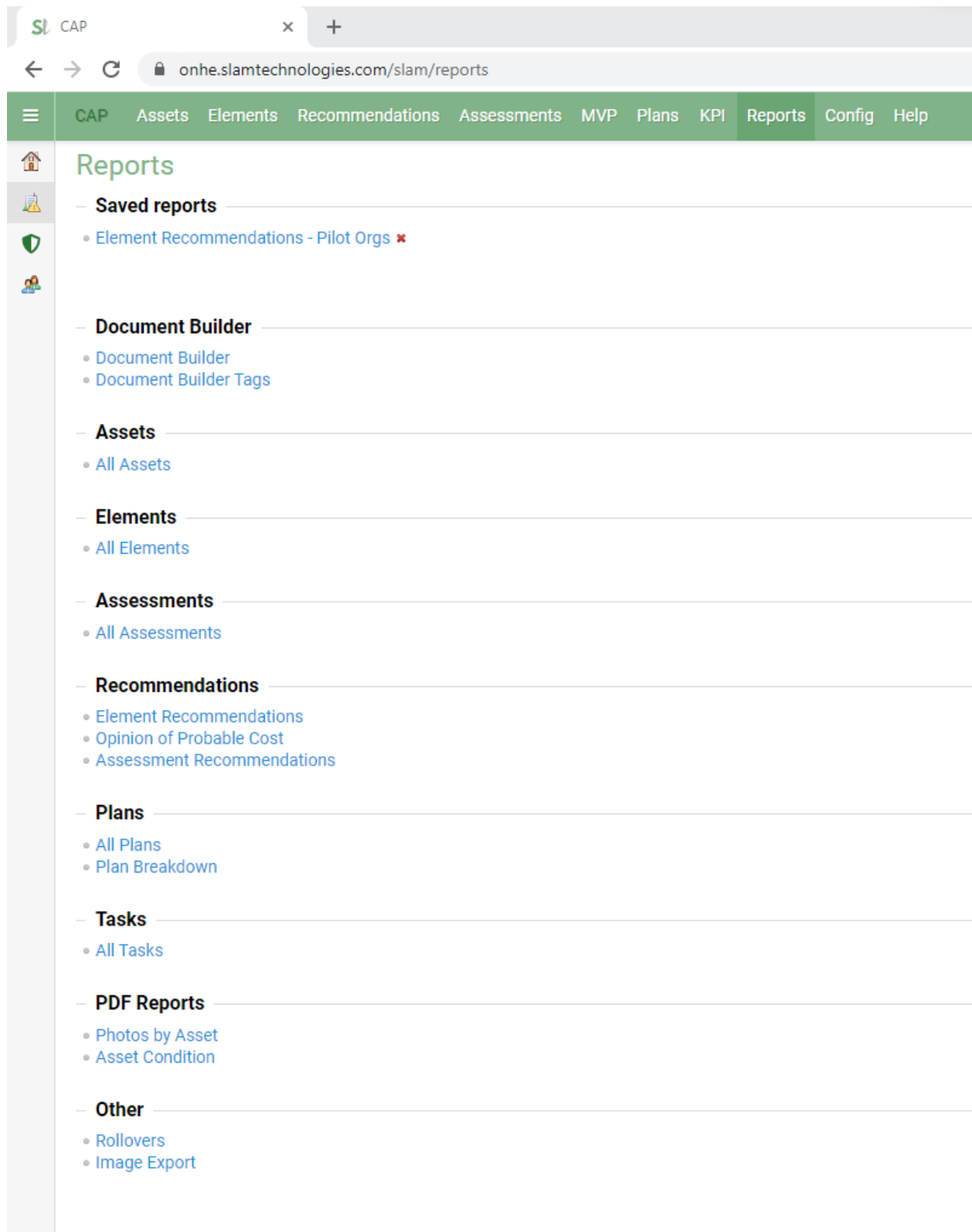


The screenshot below provides details of the easy and dynamic data filters, and shows the ability to save or export custom report formats.

The screenshot displays a web application interface for generating reports. At the top, there are navigation buttons: 'Apply' (with a green checkmark), 'Save' (with a floppy disk icon), and 'Export' (with a document icon). Below these is a checkbox labeled 'Include Cyclical Renewals'. The main section contains several filter categories, each with a dropdown arrow and a search bar. The 'Organization' filter is expanded, showing a list of institutions including Algoma University, Brock, Canadore College, Carleton University, Centennial College, Conestoga College, Durham College, Fanshawe College, and Fleming College. The 'Asset' filter is also expanded, showing a list of specific locations and assets like 1 College Ave West, 11 University Ave. East Garage, 11 University Avenue East, 1294 Balmoral, 193 Albert St., 2018_G3031 Storm Distribution, 2018_G3097 Natural Gas, 202 Regina, and 22 University Avenue East. Below the filters, there are more dropdowns for 'Uniformat Code', 'Condition', and 'Status'. A 'Hide options' button is located at the bottom right of the filter section. At the bottom of the page, a table displays the results of the filters.

11	1 College Ave West	C102002 - Solid Interior Doors - Single	The interior doors include solid core single doors mounted to wood frames with butt hinges.
12	1 College Ave	C201001 - Interior Stair	The building is provided with wood-framed stairs, with wood guards and handrails at the unprotected edge. The

The screenshot below provides an overview of the off-the-shelf list of reports that come with base configuration.



The screenshot below provides a sample extract of the default Asset Condition Assessment report (PDF).

B20 Exterior Enclosure

Element Description	
Name	B201007 - Balcony Walls and Handrails - Roof Mounted Steps and Walkway
Installation Year	2010
Condition	4 - Good
Expected Useful Life	25 Years
Remaining Useful Life	29 Years
Renewal Year	2060
Quantity / Unit of Measure	92 / LF
Unit Cost	\$304.80
Difficulty / Regional / Soft Cost Factors	1.00 / 1.00000 / 1.20000
Replacement Cost	\$33,648.92

Description
The roof includes a set of stairs with 6 steel plate treads, steel grate walkway and pipe railing.

Condition Narrative
The steel grate walkway is in good condition overall, no significant deficiencies were observed.

Photos



B201007

Recommendations

Recommendations #1 - Balcony Walls and Handrails	
Type	Life Cycle Replacement
Year	2060
Cost	\$12,801.60

One Click Report provides Element and Recommendation Information including photos organized by Uniformat II, includes user-define custom fields.

The screenshot below provides a Report Builder template that demonstrates the ability for users to customize report format and content to meet their specific needs and aligned with the corporate brand standards.

Collaborative - Passionate - Consistently Curious

1 Introduction

Roth-AMS LLC (Roth-AMS) was contracted by the \$(client.name) to conduct a Facility Condition Assessment (FCA) of the \$(asset.name) (herein referred to as the "Facility," "Site" or "Property"). We understand the purpose of this report is to assist with the long-term capital planning for the facility. This report summarizes the findings of the FCA for the property.

In addition to the FCA scope of work the following deliverables are included in this report:

- Visual-Only Energy Efficiency Review; and,
- Preventative Maintenance Plan.

Facility

Information on the evaluated facility is provided below:

Building Name	\$(asset.name)
Address	\$(asset.address)
Estimated Build Floor Area (sq. m.)	\$(asset.area)
Number of Stories	\$(asset.floors)
Date of Construction	\$(asset.date of construction)

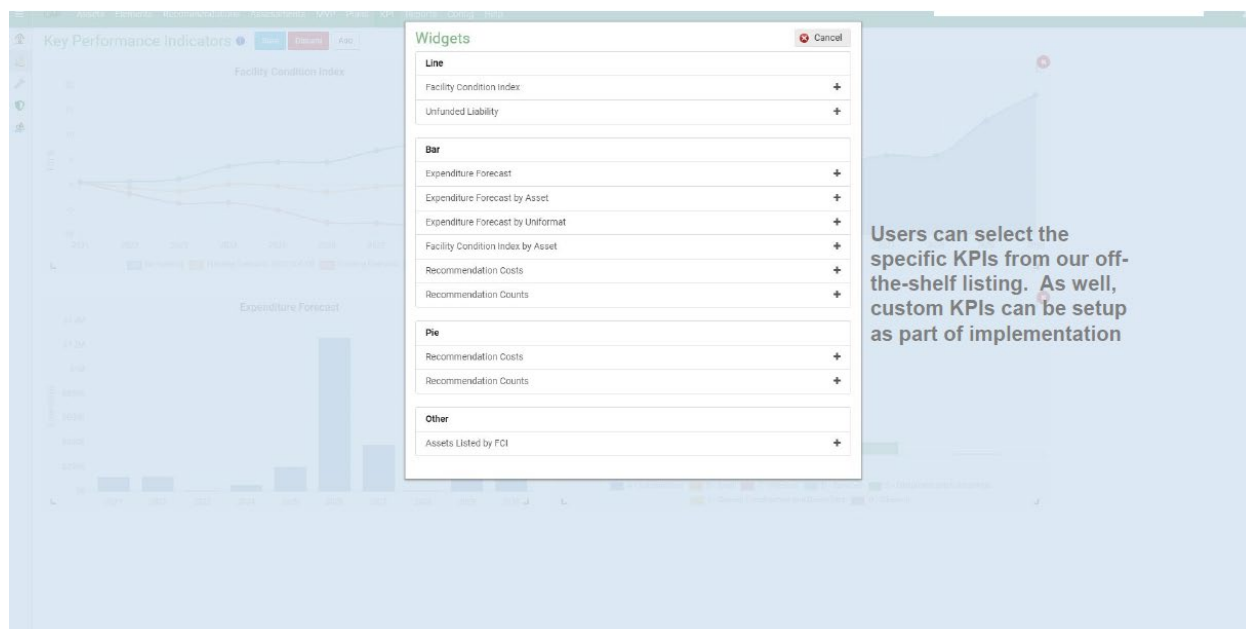
Site Review

A site visit was performed on \$(asset.full condition assessment date) by Roth-AMS personnel.

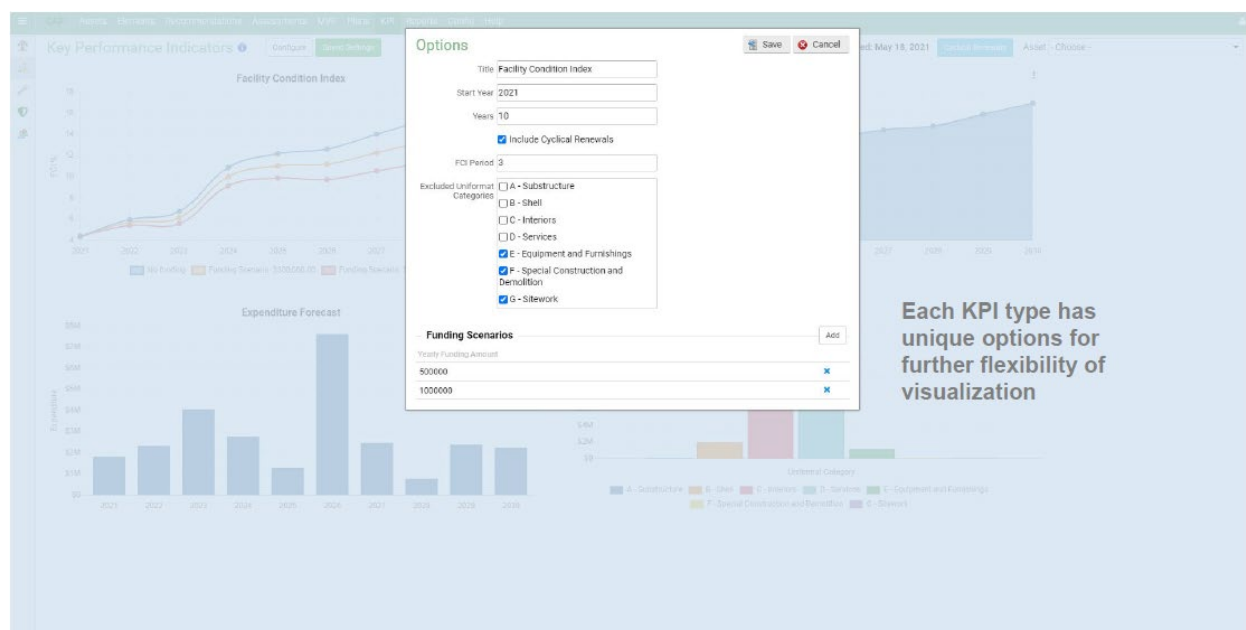
Page Break

Report Builder lets you create your own Word-Based report template based on data tags embedded into the software code. Include standard language, formatting, etc. Also can include KPIs. Clients will be trained to build their own reports, and on-going support is provided.

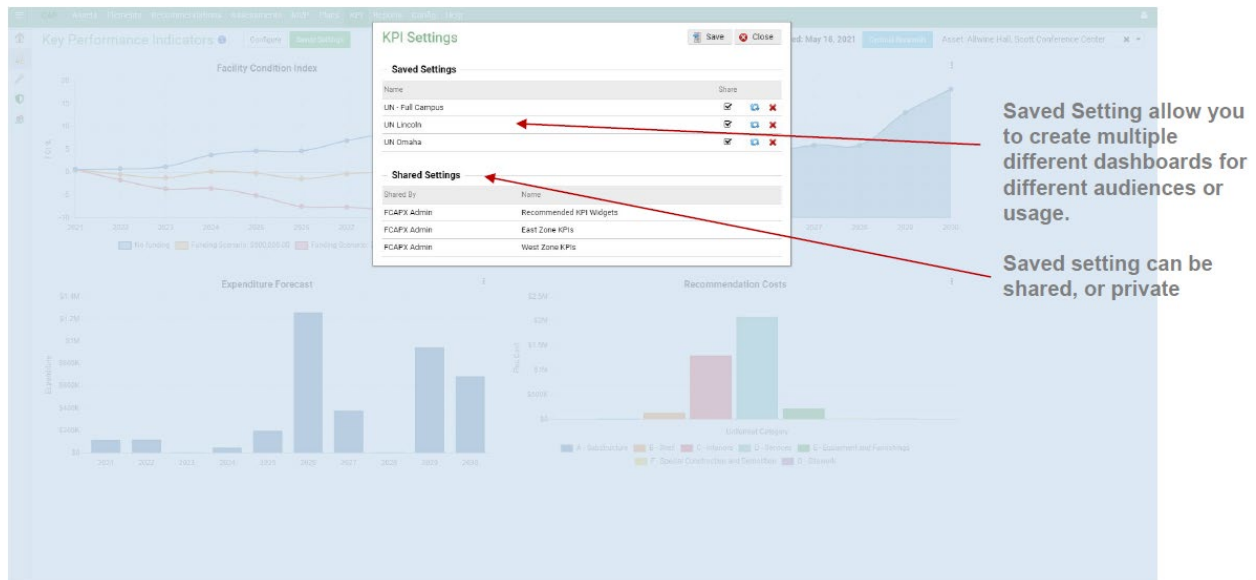
The screenshot below provides a view of the available off-the-shelf KPIs that can be selected and configured on a user's dashboard.



The screenshot below demonstrates the available options within a sample KPI that further demonstrates a user's ability to create a dashboard that provides detailed visualization aligned with the story the user is trying to tell.



The screenshot below demonstrates a user's ability to save different KPI dashboards that can be used for different audiences/stakeholder groups. Additionally, users can determine if they wish to share the configuration with other users or keep it private.



The following screenshot provides an overview of a sample KPI dashboard configuration and demonstrates the ability to update the facilities visualized based on individual assets and/or groupings based on Facility Tags.



Test Plan Overview

The following provides the standard workflow for Roth IAMS/SLAM Testing Process.

1. Test Plan Identifier

Test Plan Identifier is a unique number to identify the test plan.

Example: CAP-25

2. References

This section is to specify all the list of documents that support the test plan which you are currently creating.

Example: SoW (Scope of Work), User Stories, Test Strategy, Project Plan, Project Guidelines etc.

3. Introduction

Introduction or summary includes the purpose and scope of the project

Example: The objective of this document is to test the functionality of the 'ProjectName'

4. Test Items

A list of test items which will be tested

Example: Testing should be done on both Chrome and Internet Explorer

5. Features To Be Tested

In this section, we list out all the features that will be tested within the project.

Example: The features which are to be tested are Login Page, Dashboard, Reports.

6. Features Not To Be Tested

In this section, we list out the features which are not included in the project.

Example: KPI Dashboard or User Admin Portal

7. Approach

The overall strategy of how testing will be performed. It contains details such as Methodology, Test types, Test techniques etc.,

Example: We follow Agile Methodology in this project

8. Pass/Fail Criteria

In this section, we specify the criteria that will be used to determine pass or fail percentage of test items.

Example: All the major functionality of the application should work as intended and the pass percentage of test cases should be more than 95% and there should not be any critical bugs.

9. Suspension Criteria

In this section, we specify when to stop the testing.

Example: If any of the major functionalities are not functional or system experiences login issues then testing should suspend.

10. Test Deliverables

List of documents need to be delivered at each phase of testing life cycle. The list of all test artifacts.

Examples: Test Cases, Bug Report

11. Testing Tasks

In this section, we specify the list of testing tasks we need to complete in the current project.

Example: Test environment should be ready prior to test execution phase. Test summary report needs to be prepared.

12. Environmental Needs

List of hardware, software and any other tools that are needed for a test environment.

13. Responsibilities

We specify the list of roles and responsibilities of each test tasks.

Example: Test plan should be prepared by Test Lead. Preparation and execution of tests should be carried out by testers.

14. Staffing and Training Needs

Plan training course to improve the skills of resources in the project to achieve the desired goals.

15. Schedule

Complete details on when to start, finish and how much time each task should take place.

Example: Perform test execution – 120 man-hours, Test Reporting – 30 man-hours

16. Risks and Contingencies

In this section, we specify the probability of risks and contingencies to overcome those risks.

Example: Risk – In case of a wrong budget estimation, the cost may overrun.

Contingency Plan – Establish the scope before beginning the testing tasks and pay attention in the project planning and also track the budget estimates constantly.

17. Approvals

Who should sign off and approve the testing project

Example: Project manager should agree on completion of the project and determine the steps to proceed further.

Test Script

The following provides the standard a generic example of a Roth IAMS/SLAM Test Script. Specific test scripts will be designed based on the details of the development package being tested.

Test #	Description of tasks	Steps To Execute	Expected Results	Pass	Fail	Defect/Comments/Additions
CAP Update 1:						
1	Login to admin portal	1. Enter valid username & password 2. Click Login	Home page displayed after successful login	YES		Working as intended
2	Reset Password	1. Enter invalid credentials on login page. 2. Follow reset password link online. 3. Use email received to reset password	User should be able to reset their password following the link sent by email		NO	No email was received when link was clicked. Tried 2 different accounts and checked junk mail.
3						
4						
5						

The screenshot below provides an example of the Help screen within SLAM CAP providing documents and video tutorials on how to use and navigate the software. Each Client portal will have some standard documents and videos. Additionally, custom manuals and other documentation will be developed based on any below-the-line configuration and/or custom fields that each client implements.

CAP
Assets
Elements
Recommendations
Assessments
MVP
Plans
KPI
Reports
Config
Help

Help

Creating An Assessment in SLAM CAP	
How to Create Key Performance Indicators This document guides users through step-by-step on how to use SLAM CAP's Key Performance Indicators (KPIs & Widgets). A glossary of each available widget and their options can be found at the end of the document.	
SLAM Asset Management Process	
SLAM CAP Field Definitions	
SLAM Dashboard Navigation	
SLAM Photo & File Management This video demonstrates how to upload both a photo and file within various sections throughout the SLAM software.	
SLAM Review Process	
SLAM Software Usability This video is a general overview of the SLAM Software. Learn how to access the software, login with your username & password and see the overall look and feel of SLAM.	
Using SLAM CAP Assets In this video we will review how to use the Assets section within SLAM CAP, how to access all of the assets within your organization, typical columns you will see, and various asset fields.	
Using SLAM CAP Elements In this video we will review everything you need to know about the Elements Section in SLAM CAP. From viewing the landing page, element details, filters and custom flags.	
Using SLAM KPIs In this video we will review everything you need to know about SLAM's KPIs that are readily available to use at any time. We will review how to view, add, and move SLAM KPI Widgets, hover over important data for a quick preview, switch data sources, and save helpful graphs to easily access and share with other users at any time.	
Validation for Custom Fields	

APPENDIX 4

SLAM CAP SUBSCRIPTION-AS-A-SERVICE AGREEMENT

SLAM SOFTWARE AS A SERVICE SUBSCRIPTION AGREEMENT

THIS SOFTWARE AS A SERVICE AGREEMENT (the “**Agreement**”) is made this [REDACTED] day of [REDACTED], 20 [REDACTED] (the “**Effective Date**”) by and between **SLAM Technologies Ltd.** (hereinafter referred to as “**SLAM**”), and, [REDACTED], (hereinafter referred to as the “**Client**”).

All references herein to this “**Agreement**” shall include all Appendices to this Agreement.

WHEREAS:

- 1 SLAM has developed certain Software as a Service application modules (the “**SLAM Modules**”) that assist clients in efficiently managing and maintaining facility operations and making effective use of capital assets;
- 2 SLAM provides installation, operations, administration maintenance and support for the Client’s information technology solutions from SLAM’s central facility and agrees to provide the Services (as hereinafter defined) on behalf of the Client; and
- 3 The Client desires to obtain access to certain SLAM Modules and the Services provided by SLAM in accordance with the terms and conditions as set forth in this Agreement.

IN CONSIDERATION of the mutual terms and conditions contained herein, and other valuable consideration, the receipt and adequacy of which are hereby acknowledged, the parties agree as follows:

1. SOFTWARE AS A SERVICE: THE SELECTED SLAM MODULE

Subject to the terms and conditions of this Agreement, SLAM agrees to provide to the Client, on a Software as a Service basis, access to and use of the Selected SLAM Module, as identified below, in exchange for the Subscription Fees and On-Site Service Fees as set out herein.

The Client has selected the following SLAM Module: **[INSERT MODULE NAME HERE]**

For the purposes of this Agreement, the SLAM Module, selected above, together with any other additional SLAM Module that the Client may subscribe to during the Term of this Agreement or any renewal thereof shall be referred to collectively as the “**Selected SLAM Module**”.

2. AGREEMENT TERM

- a) The term of this Agreement shall be for a period of * (*) years commencing on the Effective Date to and including **[INSERT END DATE]** (the “**Term**”).
- b) Provided the Client is not in default under the terms and conditions of this Agreement, the Client shall have an option to renew this Agreement for a further term of * (*) year(s). The renewal term shall be on the same terms and conditions contained herein, save and except that the Annual Subscription Fees and the On-Site Service Fee for such renewal term shall be as set forth in Appendix C and Appendix D, respectively. In order to exercise its option to renew, the Client must provide written notice to SLAM at least three (3) months prior to the expiry of the Term.

[NOTE: If this subsection (b) is used, **Appendix C** and **D** must be inserted]

- or -

(b) Provided the Client is not in default under the terms and conditions of this Agreement, the Client shall have an option to renew this Agreement for a further term of * (*) year(s). The renewal term shall be on the same terms and conditions contained herein, save and except that the Annual Subscription Fees and the on-Site Service Fees (collectively the “Fees”) shall be indexed annually during each year of the renewal term, by increasing the Fees by the percentage increase in the Consumer Price Index for Canada (All Items, base year 2002 = 100) published by Statistics Canada or by a successor or other governmental agency (the “CPI”) for the preceding twelve (12) calendar months before each anniversary date of this Agreement for each year of the renewal term. It is understood and agreed that a reduction in the CPI shall not result in a decrease in the amount of the Fees.

- or -

(b) Provided the Client is not in default under the terms and conditions of this Agreement, the Client shall have an option to renew this Agreement for a further term of * (*) year(s). The renewal term shall be on the same terms and conditions contained herein, save and except that the Annual Subscription Fee and the On-Site Services Fees (collectively, the “Fees”) shall be negotiated by the parties and agreed to thirty (30) days prior to the end of the initial Term, failing which this Agreement shall be null and void and of no further force and effect. It is understood and agreed that the Fees for the renewal term ***[shall not be less than OR shall not be greater than]** the

percentage increase in the Consumer Price Index for Canada (All Items, base year 2002 = 100) published by Statistics Canada or by a successor or other governmental agency (the "CPI") for the preceding for the twelve (12) calendar months prior to the end of the initial Term.

[NOTE: Selection between the two options must be made.]

3. LICENCE GRANT

During the Term and any renewal thereof, SLAM hereby grants to the Client, subject to all of the terms and conditions of this Agreement, a non-exclusive, non-transferrable licence for access to and use of the Selected SLAM Module via the Internet and to use the Selected SLAM Module, in object code form only, solely for business purposes in accordance with the terms set out in this Agreement. The Licence herein granted to the Client includes the use of any upgrades and enhancements to the product versions of the Selected SLAM Module if, as and when released by SLAM in its sole discretion. SLAM represents and warrants that it has the authority to licence the Selected SLAM Module for the purposes set forth in this Agreement.

4. LICENCE RESTRICTIONS

Client shall not, directly or indirectly:

- a) reverse engineer, decompile, disassemble or otherwise attempt to discover the source code or underlying ideas or algorithms of the Selected SLAM Module;
- b) modify, translate or create derivative works based on the Selected SLAM Module;
- c) rent, lease, distribute, sell, resell, assign or otherwise transfer rights to the Selected SLAM Module;
- d) use the Selected SLAM Module for timesharing or service for the benefit of a third party;
- e) remove any proprietary notices from the Selected SLAM Module;
- f) without the prior written consent of SLAM, create any link to or accessible from the Selected SLAM Module;
- g) frame or mirror any content contained on, the Selected SLAM Module; or
- h) publish or disclose to third parties any evaluation of the Selected SLAM Module.

5. IMPLEMENTATION, TRAINING AND SYSTEM LAUNCH

SLAM agrees to provide to the Client certain services in relation to the implementation, training and launch of the Selected SLAM Module. The implementation, training and launch of services described below, together with Maintenance and Support Services as described in Section 6.01 of this Agreement shall be collectively referred to as the “Services”.

a) **CLIENT IMPLEMENTATION PLAN**

SLAM will coordinate with the Client to complete the necessary steps and plan to successfully launch and permit the Client to operate and access the Selected SLAM Module.

b) **TRAINING**

SLAM will provide training as per the requirements and direction of the Client. Training shall include remote (web-based) training sessions as well as on-site group training, as required. All on-site training during the Term is subject to On-Site Service Fees as described in Appendix B.

c) **SYSTEM LAUNCH AND ACCEPTANCE**

SLAM will make the Selected SLAM Module available at the following URL () for purposes of application testing, pilot phase and future access.

SLAM will have all components, including all reporting, of the database fully functional at a date to be decided jointly with the Client.

d) **DATA STORAGE SERVICES**

The Selected SLAM Module, together with all data, information and material that the Client enters into the Selected SLAM Module or has entered on its behalf (the “Client Data”) will be stored on SLAM servers at no additional cost or fees to the Client. SLAM reserves the right to establish a maximum amount of memory or other computer storage and a maximum amount of Client Data that the Client may store, post or transmit through the Selected SLAM Module. The Client shall be solely responsible for the accuracy, quality, integrity, legality, reliability, appropriateness and copyright of all Client Data and SLAM assumes no responsibility for the deletion, correction, destruction, loss, infringement or failure of the Services to store any Client Data.

6. MAINTENANCE SUPPORT SERVICES

In addition to the services described in Section 5, above, SLAM shall provide Maintenance and Support Services, as hereinafter described, to the Client during the Term of this Agreement and any renewal thereof. “**Maintenance and Support Services**” shall comprise the following:

a) **TECHNICAL SUPPORT**

- (i) **Help Desk Support** – On-line telephone support is offered by SLAM between the hours of 8:30 AM and 4:30 PM, EST, Monday through Friday, excluding

statutory holidays, to assist Clients in using the Selected SLAM Module and the correction of minor issues, errors and bugs in relation to the use of the Selected SLAM Module. The Annual Subscription Fee entitles the Client to unlimited Help Desk support.

- (ii) **Patches, Fixes and Enhancements.** At the sole discretion of SLAM, SLAM may create and upload patches, fixes, enhancements or upgrades in respect of the Selected SLAM Module, as part of the Services hereunder.
- (iii) **Exclusions.** Services shall not include the diagnosis and rectification of any errors in the Selected SLAM Module resulting from:
 - A. any modifications of the Selected SLAM Module made by any person other than SLAM;
 - B. minor defects in the Selected SLAM Module which do not significantly affect or impair the use of the Selected SLAM Module;
 - C. any incorrect or improper use of the Selected SLAM Module;
 - D. the failure by the Client to implement recommendations in respect of any solutions to errors previously advised by SLAM; or
 - E. the use of the Selected SLAM Module for any purpose for which it was not designed.
- (iv) **Rectifications of Errors.** SLAM shall, upon request by the Client, provide diagnosis and rectification of errors notwithstanding that the error in question results from any of the circumstances described in section 6.01(a)(iii) and SLAM shall charge for this rectification of the Selected SLAM Module on a time and materials basis.

b) **SERVER TECHNICAL SUPPORT**

- (i) When preventative maintenance is required on SLAM servers, it will be scheduled to occur outside of normal operating hours. In the event of critical server maintenance requirements, the Client's primary technical contact will be advised of any maintenance that must be performed during normal operating hours.
- (ii) Planned server down times will occur on a scheduled basis between the hours of 10:00 p.m. to 5:00 a.m. (Eastern Time). SLAM will provide five (5) days' notice for any planned outages for those services and/or Clients being affected.
- (iii) When emergency server maintenance is required, SLAM will provide the Client with such reasonable notice as possible in the circumstances that its access to the Selected SLAM Module may be unavailable. However, it is understood and agreed that in an absolute emergency, the Client may not be notified ahead of time of any unavailability of the Selected SLAM Module.

c) **SOFTWARE LICENSING & SUPPORT**

- (i) SLAM will provide all operating and licences of third party applications as part of the services delivered pursuant to this Agreement. SLAM will be responsible for compliance of all third party operating system and third party application licensing on the servers within the SLAM office used for application hosting. All third party licenses will be purchased by SLAM and remain the property of SLAM at all times.
- (ii) Periodically, service packs and patches are required on the servers for security and performance enhancement. Management of security and performance enhancement updates will be the responsibility of SLAM and will be applied at the discretion of SLAM.

d) **CLIENT OBLIGATIONS**

During the Term of this Agreement and any renewal thereof, the Client shall:

- (i) provide SLAM (so far as the Client is able) with a documented example of any errors or issues in respect of which a request for diagnosis and rectification has been made under this Agreement;
- (ii) co-operate fully with SLAM personnel in the diagnosis of any error in the Selected SLAM Module and perform such tests of the Selected SLAM Module as SLAM shall request in the evaluation of any request for support Services by the Client;
- (iii) ensure that the administration functionality of the Selected SLAM Module is used in a proper manner by competent trained employees only or by persons under their supervision;
- (iv) save as otherwise expressly provided in this Agreement, not make any translation, adaptation, arrangement or any other alteration of the Selected SLAM Module or make any reproduction, distribution, communication, display or performance to the public of the results of such acts; and
- (v) within three (3) days of the Effective Date hereof, provide SLAM with the identity of up to three (3) individuals who shall act as the designated technical contact persons and channels of communication for the provision by SLAM of the support Services during the Term or any renewal thereof. The Client shall inform SLAM of any change in the identity of such persons.

SLAM and the Client agreed to the following:

- (vi) Client is responsible for obtaining and maintaining all computer hardware, software and communications equipment needed to internally access the Selected SLAM Module and for paying all third-party access charges (i.e. ISP, telecommunications) incurred while using the administration and related functionality of the Selected SLAM Module;
- (vii) Client shall be solely responsible for its actions and the actions of its users while using the Selected SLAM Module and the contents of its transmissions through the

Selected SLAM Module and Client Data stored on the SLAM servers. Client agrees:

- A. to abide by all laws and regulations applicable to the Client's use of the Selected SLAM Module;
- B. not to upload or distribute in any way files that contain viruses, corrupted files, or any other similar software or programs that may damage the operation of the Selected SLAM Module, the SLAM servers and equipment;
- C. not to use the Selected SLAM Module for illegal purposes;
- D. not to interfere or disrupt networks connected to the Selected SLAM Module;
- E. not to upload, post, promote or transmit through the Selected SLAM Module or SLAM Servers any unlawful, harassing, libellous, abusive, threatening, harmful, vulgar, obscene, hateful, racially, ethnically or otherwise objectionable material of any kind or nature;
- F. not to transmit, post or upload any material that encourages conduct that could constitute a criminal offence or give rise to civil liability; and
- G. to comply with all regulations, policies and procedures of networks connected to the Selected SLAM Module. Client acknowledges and agrees that SLAM neither endorses the contents of any Client communications nor assumes any responsibility for threatening, libellous, obscene, harassing or offensive material contained therein, any infringement of third party intellectual property rights arising therefrom or any crime facilitated thereby. SLAM may remove any violating content posted on the Selected SLAM Module or transmitted through the Selected SLAM Module or on the SLAM Servers, without notice to the Client.

e) **PAYMENT**

In the event that the Client fails to pay any amounts due pursuant to this Agreement within thirty (30) days of the due date, SLAM shall be entitled, without prejudice to any other rights and remedies it may have under this Agreement, to cease provision of the support Services and all Client access to the Selected SLAM Module until such amounts have been paid in full.

7. PASSWORDS AND SECURITY

a) SLAM and the Client hereby agree to the following:

(i) **PASSWORDS**

SLAM shall issue to the Client a password to use the Client's account. The Client and its users are responsible for maintaining the confidentiality of all passwords and for ensuring that each password is used only by the authorized user. The Client is entirely responsible for any and all activities that occur under the Client's account. The Client agrees to immediately notify SLAM of any unauthorized use of the Client's account (including each password of each user accessing the

Selected SLAM Module by means of the Client's account) or any other breach of security known to the Client. SLAM shall have no liability for any loss or damage arising from the Client's failure to comply with these requirements. SLAM will maintain the Client passwords as confidential and will not disclose them to third parties.

- b) During the Term and any renewal thereof SLAM shall ensure that its operations, Services and Software meet the Payment Card Industry (PCI) security compliance standards as promulgated and amended from time to time by the PCI Security Standards Council.

8. REPRESENTATIONS AND WARRANTIES

The Client represents and warrants to SLAM that:

- a) It has all the authority to enter into and perform its obligations under this Agreement; and
- b) It is expressly and exclusively responsible for managing its own business.

9. SLAM SECURITY AND SERVER MONITORINGS

a) SECURITY

Information stored in the Selected SLAM Module on SLAM servers is accessible only by the Client, those people that the Client authorizes, and SLAM (for the purpose of supporting the application). Only SLAM authorized operators and system administrators have access to the SLAM data centre, equipment rooms and servers.

b) PERFORMANCE STANDARDS

- (i) SLAM shall use reasonable efforts to monitor its servers to ensure that all service-impacting incidents are detected and addressed prior to inquiry from Client. Should an instance occur when a SLAM server is not accessible (an "**Incident**"), SLAM shall use reasonable efforts to inform the Client by electronic mail with fifteen (15) minutes after learning of the Incident. SLAM shall report to one of the Client's designated technical contact persons by electronic mail every sixty (60) minutes regarding the status of the Incident, until resolution is reached.
- (ii) SLAM shall use reasonable efforts to correct "minor bugs" associated with an Incident within seven (7) business days after the discovery of the Incident, and "major errors" associated with the Incident with two (2) business days after the discovery of the Incident. Client and SLAM shall use reasonable efforts to agree upon whether an Incident is a "minor bug" or a "major error" within four (4) hours of the Incident. Failing such agreement, SLAM, acting reasonably, shall make such determination in its sole discretion.

- (iii) SLAM shall provide to the Client a report indicating outages (if any) and time for resolution each quarter at the Client's request.
- c) **DISASTER RECOVERY PLAN**
 - (i) SLAM shall ensure that Client Data is backed up to tape on a nightly basis. Weekly backups shall be stored offsite a minimum of ten (10) kilometers from SLAM offices. Database backups shall be stored for a period of one (1) year.
 - (ii) In the event of component failure in a server, components will either be available on-site or SLAM has secured third party agreements to have replacement components within four (4) hours, if reasonable in the circumstances.
 - (iii) In the event of complete non-functionality of the independent data centre office, SLAM has a remote site set up to allow for complete restoration of Services within a twenty-four (24) hour period, if reasonable in the circumstances.
- d) **MEAN TIME TO REPAIR**

In the event of an outage at the SLAM data centre or other SLAM location, SLAM will strive to restore Client Services in a timely manner. With regard to problems in the internal SLAM infrastructure, SLAM shall use reasonable efforts to achieve a Mean Time to Repair (MTTR) of four (4) hours from the time of problem identification. It is understood and agreed that external problems, such as Internet connectivity at SLAM' data center, are beyond the control of SLAM and may increase the MTTR.

10. WARRANTIES AND LIMITATION OF LIABILITY

- a) SLAM warrants that the Selected SLAM Module will perform substantially and materially in accordance with the functional specifications provided to the Client under normal use and circumstances for the Selected SLAM Module provided in accordance with this Agreement. If there is a material breach of the above warranty, SLAM's entire liability and Client's entire remedy shall be at SLAM's sole discretion to:
 - (i) modify the Selected SLAM Module to conform to the functionality specifications provided to the Client; or
 - (ii) terminate this Agreement with no further liability to SLAM or the Client.
- b) Other than as set out above, the Client expressly agrees that use of the Selected SLAM Module is at the Client's sole risk. The Selected SLAM Module is provided on an "as is, as available" basis. SLAM expressly disclaims all warranties of any kind, whether express or implied, including, but not limited to, the implied warranties of merchantability, fitness for a particular purpose, title and non-infringement, as well as warranties arising by usage of trade, course of dealing or course of performance.
- c) SLAM makes no warranty that the Selected SLAM Module will meet the Client's requirements that the services will be uninterrupted, timely, secure or error-free, or that defects in the Selected SLAM Module will be corrected. SLAM makes no

warranty as to the results that may be obtained from use of the Selected SLAM Module or as to the accuracy or reliability of any contents or information or payment transaction obtained or made by the Selected SLAM Module. The Client understands and agrees that any material or data downloaded or otherwise obtained through the Selected SLAM Module is done at the Client's own discretion and risk and that the Client will be solely responsible for any damage to the Client's computer systems or loss of data or income that results from the download of such material or data or transactional use of the Selected SLAM Module.

- d) SLAM's liability for any claims, costs, losses, expenses or damages of any kind whatsoever, including but not limited to liability for any fundamental breach of this Agreement or for patent, copyright or any other intellectual property right infringement, shall not exceed the subscription fees paid hereunder for the use of the Selected SLAM Module. In no event will SLAM be liable for any special, indirect, incidental, consequential or punitive damages (including, without limitation, damages for loss of profit, loss of data, loss of use, loss of business information or any other intangible property), even if SLAM has been advised of the possibility of such damages or if such damages were reasonably foreseeable, whether in an action based in contract, tort, strict liability, breach of warranty or otherwise. Client's sole remedies are as set forth herein.

11. COPYRIGHT AND INTELLECTUAL PROPERTY RIGHTS

- a) The Client hereby acknowledges that all software applications, including without limitation the Selected SLAM Module and all other SLAM software (collectively, the "**Software**") is the exclusive property of SLAM. All right, title and interest, without limitation, including all intellectual property rights, in and to the Software, and any copies thereof and any changes, modifications or corrections to the Software, and all documentation, code and logic which describes and/or comprises the Software belong to SLAM. Unless otherwise agreed to in writing by the parties hereto, if Client introduces any modifications or corrections of any type or nature to the Software, then Client hereby irrevocably assigns to SLAM all such right, title and interest to such modifications or corrections and agrees to execute all documents necessary to implement such assignments as requested by SLAM.
- b) Client acknowledges that the Software contains valuable trade secrets and confidential information owned by SLAM, including but not limited to the development status of the Software, the functionality of the Software, the appearance, content and flow of the Software's screen, the method and pattern of user interaction with the Software and the content of the Software's documentation. Client agrees to keep confidential and not to publish, disclose, display, disseminate, provide or otherwise make available in any form the Software or the information contained therein, or any portion thereof, to any third party, without the prior written consent of SLAM.

12. FEES

- a) During the Term, the Client shall pay to SLAM the Annual Subscription Fees as set out in Appendix A to this Agreement. *[In the event this Agreement is renewed pursuant to the terms and conditions herein contained, the Client shall pay SLAM the Annual Subscription Fees as set out in **Appendix C** herein during the renewal term.]

[NOTE: **Appendix C** is only applicable if renewal rates are fixed pursuant to s. 2 (b).]

- b) The Annual Subscription Fee shall be payable, in advance, on the anniversary of the Effective Date in each year of the Term and any renewal thereof.
- c) During the Term the Client shall pay to SLAM On-Site Service Fees as set out in Appendix B to this Agreement. *[In the event this Agreement is renewed pursuant to the terms and conditions herein contained, the Client shall pay SLAM the On-Site Service Fees as set out in Appendix D herein during the renewal term.]

[NOTE: **Appendix D** is only applicable if renewal rates are fixed pursuant to s. 2 (b).]

- d) On-Site Fees payable to SLAM shall be invoiced to the Client and are payable within thirty (30) days of the date of the invoice.
- e) All fees stated herein are exclusive of applicable provincial and federal sales, goods and services and harmonized sales taxes. The Client shall be responsible for the payment of any taxes applicable to the products and services provided under this Agreement.
- f) It is understood and agreed that the Annual Subscription Fees payable hereunder do not include client-specific feature requests or modifications to the Software.

13. TERMINATION

In the event that a party to this Agreement fails to perform any of its obligations under this Agreement, the other party may provide written notice of breach to such breaching party. If the breaching party does not fully cure each such breach within thirty (30) days of receiving such notice, the other party may immediately terminate this Agreement by providing written notice of termination to the breaching party.

14. EFFECTS OF TERMINATION

- a) Upon the expiry or the termination of this Agreement (the “**Termination Date**”), the Client will no longer be allowed access the Selected SLAM Module and all obligations of SLAM under this Agreement shall cease.
- b) Any expiry or termination of this Agreement shall relieve the Client of its obligations to pay to SLAM any fees and/or amounts that have accrued after the termination

date. The Client shall pay to SLAM any fees that are otherwise due to SLAM under this Agreement.

- c) Refunds, where applicable, are pro-rated to the date of termination.

15. CLIENT DATA

- a) As between SLAM and the Client, the Client shall own all data, information or material that the Client enters into the Selected SLAM Module or has entered on its behalf ("**Client Data**"). Except as permitted in this Agreement, SLAM will not edit, delete, disclose the contents of Client Data unless authorized by the Client or unless SLAM is required to do so by law or in the good faith belief that such action is necessary to:
 - (i) conform to applicable laws or comply with legal process served on SLAM;
 - (ii) protect and defend the rights or property of SLAM; or
 - (iii) enforce this Agreement.
- b) SLAM shall retain Client Data for a period of thirty (30) days after the expiration or termination of this Agreement. The Client may request SLAM to provide a copy of all Client Data on the SLAM database on a client-provided hard drive upon request, provided such request is made within thirty (30) days after the expiration or termination of this Agreement.

16. NON-SOLICITATION OF PERSONNEL AND CLIENTS

Client acknowledges that it is critical to SLAM that it retain its employees, personnel, independent contractors, including programmers, systems analysts, maintenance, support and training staff (the "SLAM personnel"). Accordingly, client covenants and agrees that it will not, at any time during the term and any renewal thereof and for a period of five (5) years thereafter, directly or indirectly, hire or enter into any contractual arrangement with, use the services of or employ any slam personnel, or otherwise attempt slam personnel to withdraw from its employment or contractual relationship with SLAM.

17. PUBLICITY

Both parties agree that neither party may use the other party's name in a press release disclosing the parties and the nature of this Agreement, unless permission is otherwise obtained in writing.

18. ENTIRE AGREEMENT

Client acknowledges that client has read and understands this agreement, the terms and conditions, and appendices contained herein and agrees to be bound by them. Client further acknowledges that this is the complete and exclusive statement of the agreement, that client has not been induced to enter into this agreement by any representation or

warranty not set forth in this agreement and that this agreement supersedes all previous oral or written proposals, representations or agreements and all other communications between the parties relating to the subject matter hereof. In the event of an inconsistency between the provisions of this agreement and the provisions of any appendix attached hereto, the provisions of such appendix shall prevail.

19. NOTICES

All notices to a party of this Agreement shall be in writing and sent to the address specified in this Agreement and shall be deemed to have been duly given when received, if personally delivered; when receipt is electronically confirmed, if transmitted by facsimile or email; the day after delivery, if sent by overnight courier by a recognized delivery service; and two (2) days after delivery, if sent by regular mail.

20. ASSIGNMENT

This Agreement shall be binding on and shall endure to the benefit of the parties hereto and their respective successors and permitted assigns. The Client may not assign this Agreement, directly or indirectly, by operation of law or otherwise, without SLAM's prior written consent.

21. SEVERABILITY

In the event, any provision of this Agreement is held to be unlawful, invalid and/or unenforceable, such provision shall be considered severed from this Agreement, but all remaining provisions of this Agreement will remain in full force and effect.

22. AMENDMENT

This Agreement may be amended or modified only by a written instrument signed by SLAM and the Client.

23. GOVERNING LAW

This Agreement, and all matters arising out of or relating to this Agreement, shall be governed by the laws of the Province of Ontario.

DATED this [] day of [], 20[].

<CLIENT NAME>

Per: _____

Name:

Title:

I have the authority to bind the Corporation

<CLIENT INFO>

Address:

Phone:

Fax:

Email:

SLAM TECHNOLOGIES LTD

Per: _____

Name:

Title:

I have the authority to bind the Corporation

SLAM TECHNOLOGIES LTD

Email: info@slamtechnologies.com

APPENDIX A

ANNUAL SUBSCRIPTION FEE FOR THE TERM

Term	Client URL (Application Host)	Period	Annual Fee
Year 1	****	****	\$
Year 2	****	****	\$
Year 3	****	****	\$

Annual Subscription Fees shall include the initial set up, launch and required training in addition to ongoing maintenance and support services as described in Section 5 and Section 6 of the Agreement.

Any on-site work performed by SLAM or its employees, including, but not limited to on-site training, on-site application set up, or on-site maintenance of the Selected SLAM Module shall be in addition to and not included in the Annual Subscription Fee.

APPENDIX B

ON-SITE SERVICE FEES DURING THE TERM

SLAM On-Site (Per Diem Expenses – Flat Rate) \$ **/Day

The Client shall pay to SLAM the SLAM On-Site Fees in the amount above for attendances to any of the Client's properties to perform functions including but not limited to, on-site training, on-site application set up, or on-site maintenance of the Selected SLAM Module. Prices for SLAM staff to be on-site at the Client's properties are set at a fixed rate of \$** per day and includes one (1) to four (4) SLAM employees as required.

For the purposes hereof, "on-site" shall mean any attendance by SLAM staff at any properties where the business and activities of the Client take place.

- or -

APPENDIX B

ON-SITE SERVICE FEES DURING THE TERM

Item Description	Fees
Mileage (subject to change)	\$ *. **/km
Accommodation (maximum per day)	\$ *. **
Daily Meal Allowance (maximum per day)	\$ *. **

The Client shall pay to SLAM the SLAM On-Site Fees in the amounts above for attendances to any of the Client's properties to perform functions including but not limited to, on-site training, on-site application set up, or on-site maintenance of the Selected SLAM Module.

For the purposes hereof, "on-site" shall mean any attendance by SLAM staff at any properties where the business and activities of the Client take place.

APPENDIX C

ANNUAL SUBSCRIPTION FEE FOR THE RENEWAL TERM

Term	Client URL (Application Host)	Period	Annual Fee
Year 1	****	****	\$
Year 2	****	****	\$
Year 3	****	****	\$

[NOTE: Only to be used if Annual Subscription Fee is fixed pursuant to 2 (b)]

Any on-site work performed by SLAM or its employees, including, but not limited to on-site training, on-site application set up, or on-site maintenance of the Selected SLAM Module shall be in addition to and not included in the Annual Subscription Fee for the renewal term.

APPENDIX D

*[NOTE: Only to be used if On-Site Service Fees are fixed pursuant to sections 2 (b)]

ON-SITE SERVICE FEES DURING THE RENEWAL TERM

SLAM On-Site (Per Diem Expenses – Flat Rate) \$ **/Day

The Client shall pay to SLAM the SLAM On-Site Fees in the amount above for attendances to any of the Client's properties to perform functions including but not limited to, on-site training, on-site application set up, or on-site maintenance of the Selected SLAM Module. Prices for SLAM staff to be on-site at the Client's properties are set at a fixed rate of \$** per day and includes one (1) to four (4) SLAM employees as required.

For the purposes hereof, "on-site" shall mean any attendance by SLAM staff at any properties where the business and activities of the Client take place.

- or -

ON-SITE SERVICE FEES DURING THE RENEWAL TERM

Item Description	Fees
Mileage (subject to change)	\$ **.*/km
Accommodation (maximum per day)	\$ **.*/day
Daily Meal Allowance (maximum per day)	\$ **.*/day

The Client shall pay to SLAM the SLAM On-Site Fees in the amounts above for attendances to any of the Client's properties to perform functions including but not limited to, on-site training, on-site application set up, or on-site maintenance of the Selected SLAM Module.

For the purposes hereof, "on-site" shall mean any attendance by SLAM staff at any properties where the business and activities of the Client take place.



NON-COLLUSION STATEMENT

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g., ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents, and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

NAME

RELATIONSHIPS

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

Authorized Signature

William (Bill) Roth

Name (Printed)

President & CEO

Title

April 29, 2024

Date



**CONTRACTOR'S CERTIFICATE OF COMPLIANCE WITH
NON-DISCRIMINATION PROVISIONS OF THE CONTRACT**

The completed and signed form should be returned with the Contractor's submittal. If not provided with submittal, the Contractor must submit within three business days of City's request. Contractor may be deemed non-responsive for failure to fully comply within stated timeframes.

Pursuant to City Ordinance Sec. 2-17(a)(i)(ii), bidders must certify compliance with the Non-Discrimination provision of the ordinance.

- A. Contractors doing business with the City shall not discriminate against their employees based on the employee's race, color, religion, gender (including identity or expression), marital status, sexual orientation, national origin, age, disability, or any other protected classification as defined by applicable law.

Contracts. Every Contract exceeding \$100,000, or otherwise exempt from this section shall contain language that obligates the Contractor to comply with the applicable provisions of this section.

The Contract shall include provisions for the following:

- (i) The Contractor certifies and represents that it will comply with this section during the entire term of the contract.
- (ii) The failure of the Contractor to comply with this section shall be deemed to be a material breach of the contract, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.

A handwritten signature in black ink, appearing to read 'Bill Roth', written over a horizontal line.

Authorized Signature

William (Bill) Roth, President and CEO

Print Name and Title

April 29, 2024

Date



CONTRACT PAYMENT METHOD

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to credit card payments via MasterCard or Visa as part of this program.

This allows you as a vendor of the City of Fort Lauderdale to receive your payments fast and safely. No more waiting for checks to be printed and mailed.

In accordance with the contract, payments on this contract will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, bidders must presently have the ability to accept the credit card or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.

All costs associated with the Contractor's participation in this purchasing program shall be borne by the Contractor. The City reserves the right to revise this program as necessary.

By signing below, you agree with these terms.

Please indicate which credit card payment you prefer:

☐ MasterCard

☒ Visa

Roth IAMS LLC

Company Name

William (Bill) Roth

Name (Printed)

President & CEO

Title



Signature

April 29, 2024

Date



LOCAL BUSINESS PREFERENCE

Section 2-199.2, Code of Ordinances of the City of Fort Lauderdale, (Ordinance No. C-12-04), provides for a local business preference.

In order to be considered for a local business preference, a bidder must include the Local Business Preference Certification Statement of this ITB, as applicable to the local business preference class claimed **at the time of bid submittal**.

Upon formal request of the City, based on the application of a Local Business Preference the Bidder shall, within ten (10) calendar days, submit the following documentation to the Local Business Preference Class claimed:

A) Copy of City of Fort Lauderdale current year business tax receipt, **or** Broward County current year business tax receipt, **and**

B) List of the names of all employees of the bidder and evidence of employees' residence within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

Failure to comply at time of bid submittal shall result in the bidder being found ineligible for the local business preference.

THE COMPLETE LOCAL BUSINESS PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK:

https://library.municode.com/fl/fort_lauderdale/codes/code_of_ordinances?nodeId=COOR_CH2AD_ARTVFI_DIV2PR_S2-186LOBUPRPR

Definitions: The term "Business" shall mean a person, firm, corporation or other business entity which is duly licensed and authorized to engage in a particular work in the State of Florida. Business shall be broken down into four (4) types of classes:

1. Class A Business – shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of the City **and** shall maintain a staffing level of the prime contractor for the proposed work of at least fifty percent (50%) who are residents of the City.
2. Class B Business - shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone and staffed with full-time employees within the limits of the City **or** shall maintain a staffing level of the prime contractor for the proposed work of at least fifty percent (50%) who are residents of the City.
3. Class C Business - shall mean any Business that has established and agrees to maintain a permanent place of business located in a non-residential zone **and** staffed with full-time employees within the limits of Broward County.
4. Class D Business – shall mean any Business that does not qualify as either a Class A, Class B, or Class C business.

LOCAL BUSINESS PREFERENCE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the local business price preference classification as indicated herein, and further certifies and agrees that it will re-affirm its local preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this ITB. Violation of the foregoing provision may result in contract termination.

- (1) _____
Business Name
- is a **Class A** Business as defined in City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. A copy of the City of Fort Lauderdale current year Business Tax Receipt and a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.
- (2) _____
Business Name
- is a **Class B** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. A copy of the Business Tax Receipt or a complete list of full-time employees and evidence of their addresses shall be provided within 10 calendar days of a formal request by the City.
- (3) _____
Business Name
- is a **Class C** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. A copy of the Broward County Business Tax Receipt shall be provided within 10 calendar days of a formal request by the City.
- (4) _____
Business Name
- requests a **Conditional Class A** classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
- (5) _____
Business Name
- requests a **Conditional Class B** classification as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186. Written certification of intent shall be provided within 10 calendar days of a formal request by the City.
- (6) Roth IAMS LLC
Business Name
- is considered a **Class D** Business as defined in the City of Fort Lauderdale Ordinance No. C-17-26, Sec.2-186 and does not qualify for Local Preference consideration.

BIDDER'S COMPANY: Roth IAMS LLC

AUTHORIZED COMPANY PERSON: William (Bill) Roth
PRINT NAME


SIGNATURE

Apr4/29/20
DATE



DISADVANTAGED BUSINESS ENTERPRISE (DBE) PREFERENCE

Section 2-185, Code of Ordinances of the City of Fort Lauderdale, provides for a disadvantaged business preference.

In order to be considered for a DBE Preference, a bidder must include a certification from a government agency, as applicable to the DBE Preference class claimed **at the time of bid submittal**.

Upon formal request of the City, based on the application of a DBE Preference the Bidder shall, within ten (10) calendar days, submit the following documentation to the DBE Class claimed:

A) Copy of City of Fort Lauderdale current year business tax receipt, **or** Broward County current year business tax receipt, **or** State of Florida active registration **and/or**

B) List of the names of all employees of the bidder and evidence of employees' residence within the geographic bounds of the City of Fort Lauderdale or Broward County, as the case may be, such as current Florida driver license, residential utility bill (water, electric, telephone, cable television), or other type of similar documentation acceptable to the City.

Failure to comply at time of bid submittal shall result in the bidder being found ineligible for the disadvantaged business preference.

THE COMPLETE DBE PREFERENCE ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK: <https://www.fortlauderdale.gov/home/showpublisheddocument?id=56883>

Definitions

- a. The term "disadvantaged class 1 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual. The term "Class B business" shall mean any business that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, or shall maintain a staffing level for the proposed work of at least fifty percent (50%) who are residents of the City of Fort Lauderdale.
- b. The term "disadvantaged class 2 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the city with a full-time employees and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual. The term "Class D business" shall mean any business that does not qualify as a Class A, Class B, or Class C business.
- c. The term "disadvantaged class 3 enterprise" shall mean any disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a CAM #21-0053 Exhibit 1 Page 6 of 10 non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.
- d. The term "disadvantaged class 4 enterprise" shall mean any disadvantaged business enterprise that does not qualify as a Class A, Class B, or Class C business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City's Procurement Manual.

DISADVANTAGED BUSINESS ENTERPRISE CERTIFICATION STATEMENT

The Business identified below certifies that it qualifies for the disadvantaged business enterprise price preference classification as indicated herein, and further certifies and agrees that it will re-affirm its preference classification annually no later than thirty (30) calendar days prior to the anniversary of the date of a contract awarded pursuant to this solicitation. Violation of the foregoing provision may result in contract termination.

(1) is a disadvantaged class 1 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual. The term "Class B business" shall mean any business that has established and agrees to maintain a permanent place of business located in a non-residential zone, staffed with full-time employees within the limits of the city, or shall maintain a staffing level for the proposed work of at least fifty percent (50%) who are residents of the City of Fort Lauderdale.

Business Name

(2) is a disadvantaged class 2 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business within the limits of the city with a full-time employee(s) and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual. The term "Class D business" shall mean any business that does not qualify as a Class A, Class B, or Class C business.

Business Name

(3) is a disadvantaged class 3 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that has established and agrees to maintain a permanent place of business located in a CAM #21-0053 Exhibit 1 Page 6 of 10 non-residential zone, staffed with full-time employees within the limits of the Tri-County area and provides supporting documentation of its City of Fort Lauderdale business tax and disadvantaged certification as established in the City's Procurement Manual.

Business Name

(4) is a disadvantaged class 4 enterprise as defined in the City of Fort Lauderdale Ordinance Section 2-185 disadvantaged business enterprise that does not qualify as a Class A, Class B, or Class C business, but is located in the State of Florida and provides supporting documentation of its disadvantaged certification as established in the City's Procurement Manual.

Business Name

(5) is not considered a Disadvantaged Enterprise Business as defined in the City of Fort Lauderdale Ordinance Sec.2-185 and does not qualify for DBE Preference consideration.

Business Name

BIDDER'S COMPANY: _____

AUTHORIZED COMPANY PERSON: _____
PRINT NAME SIGNATURE DATE

E-VERIFY AFFIRMATION STATEMENT

RFP/Bid /Contract No: RFP Event No. 243

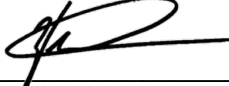
Project Description: Facilities Condition Assessment

Contractor/Proposer/Bidder acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of,

- (a) all persons employed by Contractor/Proposer/Bidder to perform employment duties within Florida during the term of the Contract, and,
- (b) all persons (including subcontractors/vendors) assigned by Contractor/Proposer/Bidder to perform work pursuant to the Contract.

The Contractor/Proposer/Bidder acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the Contract is a condition of the Contract.

Contractor/Proposer/ Bidder Company Name: Roth IAMS LLC

Authorized Company Person's Signature: 

Authorized Company Person's Title: President and CEO

Date: April 29, 2024

AFFIDAVIT OF COMPLIANCE WITH FOREIGN ENTITY LAWS
(Florida Statute- §287.138, 692.201, 692.202, 692.203, and 692.204)

The undersigned, on behalf of the entity listed below ("Entity"), hereby attests under penalty of perjury as follows:

1. Entity is not owned by the government of a foreign country of concern as defined in Section 287.138, Florida Statutes. (Source: § 287.138(2)(a), Florida Statutes)
2. The government of a foreign country of concern does not have a controlling interest in Entity. (Source: § 287.138(2)(b), Florida Statutes)
3. Entity is not organized under the laws of, and does not have a principal place of business in, a foreign country of concern. (Source: § 287.138(2)(c), Florida Statutes)
4. Entity is not owned or controlled by the government of a foreign country of concern, as defined in Section 692.201, Florida Statutes. (Source: § 288.007(2), Florida Statutes)
5. Entity is not a partnership, association, corporation, organization, or other combination of persons organized under the laws of or having its principal place of business in a foreign country of concern, as defined in Section 692.201, Florida Statutes, or a subsidiary of such entity. (Source: § 288.007(2), Florida Statutes)
6. Entity is not a foreign principal, as defined in Section 692.201, Florida Statutes. (Source: § 692.202(5)(a)(I), Florida Statutes)
7. Entity is in compliance with all applicable requirements of Sections 692.202, 692.203, and 692.204, Florida Statutes.
8. **(Only applicable if purchasing real property)** Entity is not a foreign principal prohibited from purchasing the subject real property. Entity is either (a) not a person or entity described in Section 692.204(1)(a), Florida Statutes, or (b) authorized under Section 692.204(2), Florida Statutes, to purchase the subject property. Entity is in compliance with the requirements of Section 692.204, Florida Statutes. (Source: §§ 692.203(6)(a), 692.204(6)(a), Florida Statutes)
9. The undersigned is authorized to execute this affidavit on behalf of Entity.

Name: William (Bill) Roth Title: President & CEO Entity: Roth IAMS LLC

Signature: [Signature] Date: 04/09/2024

NOTARY PUBLIC ACKNOWLEDGEMENT SECTION

STATE OF Florida
COUNTY OF Manatee

The foregoing instrument was acknowledged before me, by means of ☒ physical presence or ☐ online notarization, this 9 day of April, 2024 by William (Bill) Roth, as

President & CEO for Roth IAMS LLC

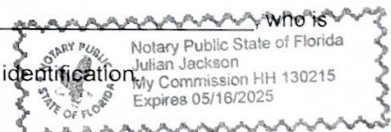
personally known to me or who has produced Ontario, CAN DL as identification

Notary Public Signature: [Signature]

(Notary Seal)

Print Name: Julia Jackson

My commission expires: 5-16-2025



CITY OF FORT LAUDERDALE BID/PROPOSAL CERTIFICATION

Please Note: It is the sole responsibility of the bidder/proposer to ensure that their response is submitted electronically through the [City's on-line strategic sourcing platform](#) prior to the bid opening date and time listed. Paper bid submittals will not be accepted. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration) _____ EIN (Optional): _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone No.: _____ FAX No.: _____ Email: _____

Delivery: Calendar days after receipt of Purchase Order (**section 1.02 of General Conditions**): _____

Total Bid Discount (**section 1.05 of General Conditions**): _____

Check box if your firm qualifies for DBE (**section 1.09 of General Conditions**): ☐

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

Addendum No.	Date Issued	Addendum No.	Date Issued	Addendum No.	Date Issued	Addendum No.	Date Issued
_____	_____	5	April 29, 2024	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A.

The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal, I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Name (printed)

Signature

Date

Title

REFERENCES

A minimum of three (3) references shall be provided. It is the responsibility of the Bidder/ Proposer to ensure that the information provided is accurate and current. The City may find your firm non-responsive for providing wrong and or outdated information. Additional references may be provided on a separate page.

Company Name: _____
Address: _____
Contact Person: _____
Title: _____
Phone #: _____
Email: _____
Contract Value: _____
Year(s): _____
Description: _____

Company Name: _____
Address: _____
Contact Person: _____
Title: _____
Phone #: _____
Email: _____
Contract Value: _____
Year(s): _____
Description: _____

Company Name: _____
Address: _____
Contact Person: _____
Title: _____
Phone #: _____
Email: _____
Contract Value: _____
Year(s): _____
Description: _____



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YY)

04/11/2024

PRODUCER M. Edward Powell Insurance Brokers Ltd. 349 Davis Road Oakville, Ontario L6J 2X2		THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.	
		INSURERS AFFORDING COVERAGE	
INSURED Roth IAMS LLC #800 - 360 Central Avenue St. Petersburg, FL 33701 FAX EMAIL jhk@powellinsbro.com		CODE ROTHUS	INSURER A: Certain Underwriters at Lloyd's INSURER B: Certain Underwriters at Lloyd's INSURER C: Certain Underwriters at Lloyd's INSURER D: INSURER E:

COVERAGES

THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS
A	GENERAL LIABILITY ☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS MADE ☒ OCCUR ☒ GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PROJECT ☐ LOC	19650854	10/31/2023	12/31/2024	EACH OCCURRENCE \$ 5,000,000 FIRE DAMAGE (Any one fire) \$ 5,000,000 MED EXP (Any one person) \$ 25,000 PERSONAL & ADV INJURY \$ 5,000,000 GENERAL AGGREGATE \$ 5,000,000 PRODUCTS - COMP/OP AGG \$ 5,000,000 Damage to Rented Premises \$ 5,000,000
B	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ ALL OWNED AUTOS ☐ SCHEDULED AUTOS ☒ HIRED AUTO ☒ NON-OWNED AUTOS ☒ Deductible \$1,000	19650854	10/31/2023	12/31/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 5,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	GARAGE LIABILITY ☐ ANY AUTO				AUTO ONLY - EA ACCIDENT \$ OTHER THAN EA ACC \$ AUTO ONLY: AGG \$
	EXCESS LIABILITY ☐ OCCUR ☐ CLAIMS MADE ☐ DEDUCTIBLE ☐ RETENTION \$				EACH OCCURRENCE \$ AGGREGATE \$ \$ \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY				WC STATUTORY LIMITS OTHER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
C	OTHER Professional Liability	18600249	10/31/2023	12/31/2024	\$5,000,000 Each Claim-Claims Made Basis \$5,000,000 Aggregate - Ded. \$10,000

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/EXCLUSIONS ADDED BY ENDORSEMENT/SPECIAL PROVISIONS

It is agreed that the City of Fort Lauderdale is added as an additional insured to policy #19650854 only but only with respect to the operations of the Named Insured.

Policy #19650854 includes Blanket Contractual Liability

CERTIFICATE HOLDER ☒ ADDITIONAL INSURED; INSURER LETTER

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES.

AUTHORIZED REPRESENTATIVE

Arlene Tribbiani 04/25/2024
GAL #250799

**Request for Taxpayer
Identification Number and Certification**

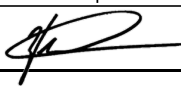
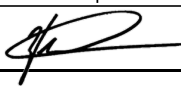
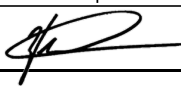
Go to www.irs.gov/FormW9 for instructions and the latest information.

**Give form to the
requester. Do not
send to the IRS.**

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) Roth IAMS LLC	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate ☒ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) P Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. ☐ Other (see instructions) _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ (Applies to accounts maintained outside the United States.)
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐	
	5 Address (number, street, and apt. or suite no.). See instructions. 360 Central Avenue - Suite 800 6 City, state, and ZIP code St Petersburg, Florida, 33701 7 List account number(s) here (optional)	Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN) Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later. Note: If the account is in more than one name, see the instructions for line 1. See also <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.	<table><tr><td colspan="10">Social security number</td></tr><tr><td></td><td></td><td></td><td>-</td><td></td><td></td><td>-</td><td></td><td></td><td></td></tr><tr><td colspan="10">or</td></tr><tr><td colspan="10">Employer identification number</td></tr><tr><td>8</td><td>6</td><td>-</td><td>2</td><td>6</td><td>0</td><td>4</td><td>6</td><td>9</td><td>8</td></tr></table>	Social security number													-			-				or										Employer identification number										8	6	-	2	6	0	4	6	9	8
Social security number																																																			
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or																																																			
Employer identification number																																																			
8	6	-	2	6	0	4	6	9	8																																										

Part II Certification Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined below); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct. Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.	<table><tr><td>Sign Here</td><td>Signature of U.S. person </td><td>Date April 29, 2024</td></tr></table>	Sign Here	Signature of U.S. person 	Date April 29, 2024
Sign Here	Signature of U.S. person 	Date April 29, 2024		

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

2024 FOREIGN LIMITED LIABILITY COMPANY ANNUAL REPORT

DOCUMENT# M23000010464

Entity Name: ROTH IAMS LLC

Current Principal Place of Business:

800 - 360 CENTRAL AVENUE
ST PETERSBURG, FL 33701

Current Mailing Address:

800 - 360 CENTRAL AVENUE
ST PETERSBURG, FL 33701 US

FEI Number: 86-2604698

Certificate of Status Desired: No

Name and Address of Current Registered Agent:

ROTH, WILLIAM
800 - 360 CENTRAL AVENUE
ST PETERSBURG, FL 33701 US

The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.

SIGNATURE:

Electronic Signature of Registered Agent

Date

Authorized Person(s) Detail :

Title MGR
Name ROTH, WILLIAM
Address 800 - 360 CENTRAL AVENUE
City-State-Zip: ST PETERSBURG FL 33701

I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am a managing member or manager of the limited liability company or the receiver or trustee empowered to execute this report as required by Chapter 605, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.

SIGNATURE: WILLIAM ROTH

PRESIDENT & CEO

03/12/2024

Electronic Signature of Signing Authorized Person(s) Detail

Date

M23000610464

(Requestor's Name)

(Address)

(Address)

(City/State/Zip/Phone #)

☐

PICK-UP

☐

WAIT

☐

MAIL

(Business Entity Name)

(Document Number)

Certified Copies _____ Certificates of Status _____

Special Instructions to Filing Officer:

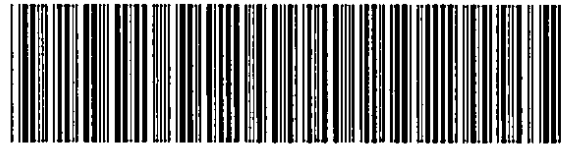
emailed
proof

8/11/23

W21000138095

sent
certification
700647

Office Use Only



700374358677

10/06/21--01017--024 **125.00

2023 OCT 11 PM 4:12

COVER LETTER

**TO: Registration Section
Division of Corporations**

SUBJECT: Roth IAMS LLC

Name of Limited Liability Company

The enclosed "Application by Foreign Limited Liability Company for Authorization to Transact Business in Florida," Certificate of Existence, and check are submitted to register the above referenced foreign limited liability company to transact business in Florida.

Please return all correspondence concerning this matter to the following:

William Roth

Name of Person

Roth IAMS LLC

Firm/Company

800 - 360 Central Avenue

Address

St. Petersburg, FL

33701

City/State and Zip Code

bill.roth@rothiams.com

E-mail address: (to be used for future annual report notification)

For further information concerning this matter, please call:

William Roth

813

379-9345 x101

at (_____) _____

Name of Contact Person

Area Code

Daytime Telephone Number

Mailing Address:

Registration Section
Division of Corporations
P.O. Box 6327
Tallahassee, FL 32314

Street Address:

Registration Section
Division of Corporations
The Centre of Tallahassee
2415 N. Monroe Street, Suite 810
Tallahassee, FL 32303

Enclosed is a check for the following amount:

Please make check payable to: **FLORIDA DEPARTMENT OF STATE**

☒ \$125.00 Filing Fee ☐ \$130.00 Filing Fee & Certificate of Status ☐ \$155.00 Filing Fee & Certified Copy ☐ \$160.00 Filing Fee, Certificate of Status & Certified Copy

**APPLICATION BY FOREIGN LIMITED LIABILITY COMPANY FOR AUTHORIZATION TO TRANSACT BUSINESS
IN FLORIDA**

*IN COMPLIANCE WITH SECTION 605.0902, FLORIDA STATUTES, THE FOLLOWING IS SUBMITTED TO REGISTER A FOREIGN LIMITED LIABILITY
COMPANY TO TRANSACT BUSINESS IN THE STATE OF FLORIDA:*

1. Roth IAMS LLC
(Name of Foreign Limited Liability Company, must include "Limited Liability Company," "L.L.C.," or "LLC")

(If name unavailable, enter alternate name adopted for the purpose of transacting business in Florida. The alternate name must include "Limited Liability Company," "L.L.C.," or "LLC")

2. Delaware 3. 86-2604698
(Jurisdiction under the law of which foreign limited liability company is organized) (EIN number, if applicable)

4. N/A
(Date first transacted business in Florida, if prior to registration)
(See sections 605.0904 & 605.0905, F.S. to determine penalty liability)

5. 800 - 360 Central Avenue 6. Same
(Street Address of Principal Office) (Mailing Address)
St. Petersburg, FL 33701

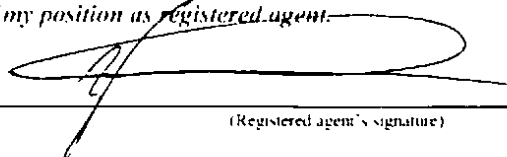
2023 JUN 11 PM 4:23

7. Name and street address of Florida registered agent: (P.O. Box NOT acceptable)

Name: William Roth
Office Address: 800 - 360 Central Avenue
St. Petersburg, Florida 33701
(City) (Zip code)

Registered agent's acceptance:

Having been named as registered agent and to accept service of process for the above stated limited liability company at the place designated in this application, I hereby accept the appointment as registered agent and agree to act in this capacity. I further agree to comply with the provisions of all statutes relative to the proper and complete performance of my duties, and I am familiar with and accept the obligations of my position as registered agent.


(Registered agent's signature)

8. For initial indexing purposes, list names, title or capacity and addresses of the primary members/managers or persons authorized to manage [up to six (6) total]:

Title or Capacity: Name and Address:
☒ Manager Name: William Roth
☐ Member Address: 800 - 360 Central Avenue
☐ Authorized St. Petersburg, FL 33701
Person _____
☐ Other _____ ☐ Other _____

☐ Manager Name: _____
☐ Member Address: _____
☐ Authorized _____
Person _____
☐ Other _____ ☐ Other _____

☐ Manager Name: _____
☐ Member Address: _____
☐ Authorized _____
Person _____
☐ Other _____ ☐ Other _____

Title or Capacity: Name and Address:
☒ Manager Name: Kyle Christiansen
☐ Member Address: 800 - 360 Central Avenue
☐ Authorized St. Petersburg, FL 33701
Person _____
☐ Other _____ ☐ Other _____

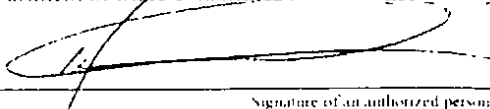
☐ Manager Name: _____
☐ Member Address: _____
☐ Authorized _____
Person _____
☐ Other _____ ☐ Other _____

☐ Manager Name: _____
☐ Member Address: _____
☐ Authorized _____
Person _____
☐ Other _____ ☐ Other _____

Important Notice: Use an attachment to report more than six (6). The attachment will be imaged for reporting purposes only. Non-indexed individuals may be added to the index when filing your Florida Department of State Annual Report form.

9. Attached is a certificate of existence, no more than 90 days old, duly authenticated by the official having custody of records in the jurisdiction under the law of which it is organized. (If the certificate is in a foreign language, a translation of the certificate under oath of the translator must be submitted)

10. This document is executed in accordance with section 605.0203 (1) (b), Florida Statutes. I am aware that any false information submitted in a document to the Department of State constitutes a third degree felony as provided for in s.817.155, F.S.



Signature of an authorized person

William Roth

Typed or printed name of signer

Delaware

The First State

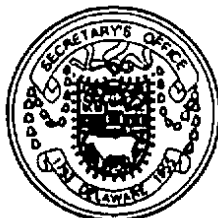
Page 1

I, JEFFREY W. BULLOCK, SECRETARY OF STATE OF THE STATE OF DELAWARE, DO HEREBY CERTIFY "ROTH IAMS LLC" IS DULY FORMED UNDER THE LAWS OF THE STATE OF DELAWARE AND IS IN GOOD STANDING AND HAS A LEGAL EXISTENCE SO FAR AS THE RECORDS OF THIS OFFICE SHOW, AS OF THE TENTH DAY OF AUGUST, A.D. 2023.

AND I DO HEREBY FURTHER CERTIFY THAT THE SAID "ROTH IAMS LLC" WAS FORMED ON THE TWENTY-NINTH DAY OF JANUARY, A.D. 2021.

AND I DO HEREBY FURTHER CERTIFY THAT THE ANNUAL TAXES HAVE BEEN PAID TO DATE.

2023 AUG 11 PM 4:23




Jeffrey W. Bullock, Secretary of State

4923820 8300

SR# 20233213833

You may verify this certificate online at corp.delaware.gov/authver.shtml

Authentication: 203935476

Date: 08-10-23

CAM #25-0779

Exhibit 5

Page 115 of 121

ADDENDUM

RFP No. 243

TITLE: Facilities Condition Assessment

ISSUED: 4/23/2024

This addendum is being issued to answer questions posted during the Q & A period. All other terms, conditions, and specifications remain unchanged.

1. Two Amendments have been issued. Do we need to acknowledge Addenda in the Proposal Certification form? Do we need to acknowledge all Questions & Answers?

Answer – Yes, please acknowledge all four issued on the proposal certification form (three previous amendments and this addendum).

2. Q 12 part 1: Section 3.3 – The report structure outlined in this section appears to be aligned more with the design process, as opposed to an FCA. Submitting a 50% FCA report, would provide detailed information on a portion of the element assessed.

Answer - No question was detected. An answer is not available for this statement.

3. Q 12 part 2: Would the City accept a draft report submission that provided findings and recommendations for all elements observed as opposed to a partial report?

Answer - Each report must follow the percentage guidelines Section of 3.3.

4. RFP Section II, Item 2.5 notes clearly that pricing is to be identified on the 'Cost Proposal Page'. This page is not found in the RFP, can you provide this?

Answer – Please disregard the reference to the 'cost proposal page'. The price must be submitted online, using the strategic sourcing platform unit price field. Please also see Q&A below.

5. In the 'Event Line Responses' tab of the submission, what all is expected to be filled in Line 1? Is this where we enter pricing?

Answer – Yes. Please also see Q&A above.

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Answer – Please disregard the reference to the 'cost proposal page'. The price must be submitted online, using the strategic sourcing platform unit price field. Please also see Q&A below.

5. In the 'Event Line Responses' tab of the submission, what all is expected to be filled in Line 1? Is this where we enter pricing?

Answer – Yes. Please also see Q&A above.

6. In the 'Event Line Responses' tab of the submission, Line 1 – Why is pricing broken down by unit price and quantity? What is expected here?

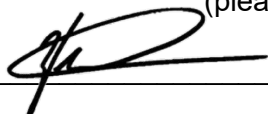
Answer – Contractor shall quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted. Please also see Q & A for numbers 4 and 5.

7. In the 'Event Line Responses' tab of the submission, Line 1 – the unit of measure is noted as "JA", and cannot be changed. Please define JA, and clarify fee expectations.

Answer – The unit of measure 'JA' is defined as Job. Contractor shall quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

Company Name: Roth IAMS LLC

(please print)

Bidder's Signature: _____

Date: April 29, 2024

Line Responses For Event # 243-5

Company: 10

Event #: 243-5

Event Name: Facilities Condition Assessment

Supplier Group: COFL

Supplier: 3089

Supplier Name: Roth IAMS LLC

Supplier Contact: 1

Supplier Contact Name: William Roth

Line Responses

Line #	Item	Description	Vendor Item	Vendor Item Description	Line Quantity	Response Quantity	Unit of Measure	Unit Price	No Charge	No Bid	No Bid Reason	Response Exists	Questions Exist	Is Awarded
*1	COND. ASSESSMENT W/ GEODATABASE	Complete Facilities Condition Assessment with Geodatabase	COND. ASSESSMENT W/ GEODATABASE		1.0000	1.0000	JA	468,378.00000000	No	No		Yes	No	No

[illegible]

From: [Lori Augustin](#)
To: [Heather Rose](#); [Bill Roth](#)
Cc: [Arista Ershadi-Vigil](#)
Subject: [EXTERNAL:CAUTION!]- RE: Voluntary Price Reduction (VPR) - RFP 243, Facilities Condition Assessment
Date: Tuesday, June 11, 2024 1:08:09 PM
Attachments: [image005.png](#)
[We sent you safe versions of your files.msg](#)
[Event 243- Voluntary Price Reduction \(VPR\) Spreadsheet RothIAMS.xlsx](#)
Importance: High

Mimecast Attachment Protection has deemed this file to be safe, but always exercise caution when opening files.

[::CAUTION!:] This email originated from *outside* The City of Fort Lauderdale.
Do Not Reply, click links, or open attachments from an unknown or suspicious origin. Confirm the email address is from an expected source before taking action.
Report any suspicious emails to spamadmin@fortlauderdale.gov

Good Afternoon Heather,

Attached please find Roth IAMS Voluntary Price Reduction offer for RFP 243, Facilities Conditions Assessments. If you have any further questions, please do not hesitate to contact us directly. Please confirm receipt of this email.

Regards,

Lori Augustin, RPA, LEED® AP O+M
Senior Consultant
Roth IAMS

Canada: [289-295-1065](tel:289-295-1065), ext. 110 | US: [813-379-9345](tel:813-379-9345), ext. 110
M: [519-381-3694](tel:519-381-3694)
lori.augustin@rothiams.com



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From: Heather Rose <HRose@fortlauderdale.gov>
Sent: Tuesday, June 11, 2024 10:45 AM
To: Bill Roth <bill.roth@rothiams.com>
Cc: Lori Augustin <lori.augustin@rothiams.com>; Arista Ershadi-Vigil <arista.ershadi-vigil@rothiams.com>
Subject: Voluntary Price Reduction (VPR) - RFP 243, Facilities Condition Assessment

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Good morning,