

## Sunstates Security, LLC

Bid Contact **Carol Drumheller**  
**cdrumheller@sunstatessecurity.com**  
**Ph 919-987-1409**

Address **801 Coporate Center Drive, Suite 110**  
**Raleigh, NC 27607**

Qualifications **WBE**

Bid Notes **Sunstates Security, LLC bid response to Bid #12435-315 - Security Guard Services for the City of Fort Lauderdale, Florida.**

Item #	Line Item	Notes	Unit Price	Qty/Unit	Attch.	Docs
12435-315--01-01	12435-315 Security Guard Services : Refer to Section VI: Cost Proposal Page	<b>Supplier Product Code:</b> Security Guard Services  <b>Supplier Notes:</b> Sunstates Security, LLC bid response to Bid #12435-315 - Security Guard Services for the City of Fort Lauderdale, Florida.	<b>First Offer -</b>	1 / each	<b>Y</b>	<b>Y</b>
Supplier Total					<b>\$0.00</b>	

**Sunstates Security, LLC**

Item: **12435-315 Security Guard Services : Refer to Section VI: Cost Proposal Page**

**Attachments**

City of Fort Lauderdale-Sunstates Security RFP 10-28-2020 FINAL.pdf

October 28, 2020

Security Services Proposal  
Prepared for:



City of Fort Lauderdale  
100 North Andrews Avenue  
Fort Lauderdale, Florida 33301



Prepared for City of Fort Lauderdale

October 28, 2020

Stefan Mohammed  
Procurement Specialist  
City of Fort Lauderdale  
100 North Andrews Avenue  
Fort Lauderdale, Florida 33301

Re: Security Guard Services for the City

Dear Mr. Mohammed:

Sunstates Security, LLC is pleased to present you with information about our company and our capabilities for providing a full-service security program to City of Fort Lauderdale. Sunstates Security is an industry leader with a differentiated approach to providing quality contract security services to Fortune 500 companies, municipalities, and small business entities alike. Sunstates has millions of hours of contract security experience, and all the resources and strength you expect from the largest providers, but our organization is uniquely structured to ensure consistently superior, client-centric service at the local level.

Because our service is highly personalized, we are careful to court the business of clients who embrace the same partnership ideals that we do. Several of our strengths that will benefit City of Fort Lauderdale should you decide to work with Sunstates Security include the following:

- A proven track record of extraordinary service with many partners
- One of the highest client retention rates in the industry
- An unwavering commitment to employ people with spotless backgrounds and career mindsets
- Rigorous basic and site-specific training, enhanced over time through continuing education
- Unprecedented employee benefit offerings help attract and maintain the best people
- Accessible, proactive management team
- Multitude of management checks and quality assurance balances
- Highly developed internal auditing system
- Cutting-edge technologies
- Total quality management focus
- A cost structure that provides the best service at the most value-oriented price point
- Transparent pricing structure, no hidden expenses





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When you turn the last page of this proposal, we hope to have communicated the following key points.

- Our client support philosophy centers on availability and accountability. The same management team making this proposal will be constantly accessible to you and accountable for the level of service provided. We genuinely care about our clients.
- Our people know their roles on our team are critical, and they realize their contributions are recognized and rewarded. By offering every opportunity for personal fulfillment, professional growth, and career advancement, we prove that we genuinely care about our people.
- The security industry is no exception to the general wisdom that “you get what you pay for.” The wage rates we are proposing reflect our realistic expectations of the cost of recruiting and retaining quality security officers. We understand our industry.

We encourage you to contact our references to learn more about our unique management structure and operating style. Our hope is that we are among the companies chosen to interview and openly discuss the merits of our proposal. Should you have questions or require any additional information, please do not hesitate to contact me.

I, Denis Kelly, COO an authorized company representative, submit this bid response on behalf of Sunstates Security, LLC to the City of Fort Lauderdale for Security Guard Services. I am authorized to contractually bind Sunstates Security, LLC.

Sincerely,

Michael Necolettos  
Regional Manager  
Sunstates Security, LLC  
1001 W. Cypress Creek Road, Bldg. 3-305  
Ft. Lauderdale, FL 33309  
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## Executive Summary – I

More than two decades ago, President Glenn P. Burrell, CPP, recognized the potential for a security firm that could successfully combine the best of both worlds – “big company” resources and economies of scale plus the committed, individualized approach of a proprietary team.

In 1998, Glenn formed Sunstates Security with a vision to provide discriminating companies with a viable, unique alternative to investing in cost-prohibitive proprietary security. Glenn launched Sunstates with 30 employees, building the company on a solid foundation of his lifetime of international security experience. For 18 years, Glenn was engaged within some of the most elite law enforcement agencies in the world, including Scotland Yard and the elite Royalty Protection Unit, where he led protection of the Queen's private estate and her family. He is a long-standing authority on issues from anti-terrorism activities and oil rig and shipping interventions to SWAT team training and force protection.

Based on commanding knowledge of evolving security challenges, Glenn has continued over more than two decades to carefully hand-pick a growing core of experienced leaders and career security professionals who are blazing a new trail in an industry infamous for its lack of regulatory standards and its tendency towards mediocrity. Today Sunstates has an operating presence across the United States and employs over 3,000 world-class security professionals.

While leaders of many multi-million-dollar companies spend their days in offices and boardrooms, Glenn Burrell is still found visiting client sites and personally overseeing account operations. Even at the helm of a large organization with diverse concerns, Glenn remains true to the spirit of personal management attention and close oversight that is the hallmark of Sunstates' service.

We look to empower our customers and all who visit their facilities with the knowledge needed to move through the day safely and be aware of their surroundings. We understand the security challenges you face and strive to work as partners to build a proactive program on the foundation of honesty, integrity, and trust.

We are proud of our tradition of hard work, integrity, and excellent customer service. With a customer retention rate of over 95%, we are confident that through our hands-on and customer-centric approach to providing our services that we understand our customers and their security goals. We know that, even in a technology-rich environment, people make a difference. From our executives to the hardworking team executing your scope of work plan, we take pride in our people and the quality services they provide. We are accountable for measuring our achievements and creating better results. We place a high priority on safety, and we want all employees and visitors to the Fort Lauderdale facilities to leave safely and feel secure. By enhancing the safety and security of your campuses, we not only help you protect



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the assets but also improve your employee and visitor satisfaction by creating an enjoyable work and social environment.

We are a North Carolina based company, with regional offices located throughout the United States, and a nationally certified Woman-Owned Business. A partnership with Sunstates Security may help your organization meet its goal of integrating diverse businesses into your overall strategic sourcing processes.

Lastly, and perhaps most importantly, Sunstates Security will take ownership of the security program so that the City of Fort Lauderdale can focus on their core businesses.

Your security program will include:

- Unparalleled management presence throughout the life of the contract
- Quality assurance checks throughout the life of the contract
- Corporate Support and Regional Support Teams
- Advanced technology solutions
- Full range of security services
- Recruitment, in-dept screening, and careful selection
- Unprecedented benefits and incentives
- Comprehensive training
- Formulated, tested transition strategy

As your security partner, we implement and manage your program and provide continuous feedback so that we are constantly moving forward and turn our security vision into reality.

**Sunstates Security Corporate Office**

801 Corporate Center Drive, Suite 300  
Raleigh N.C. 27607

**Sunstates Security Fort Lauderdale Office**

1001 W. Cypress Creek Road, Bldg. 3-305  
Ft. Lauderdale, Florida 33309

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## Key Executive Management Biographies

### *Corporate Headquarters*

**Kathryn J. Burrell**

*Chief Executive Officer*



Responsible for all operational functions for Sunstates, Kathryn co-founded the company with Glenn Burrell in 1998. After a career in human resources and success in leading a multi-million-dollar company in England, Kathryn co-founded Sunstates Security with Glenn Burrell in 1998. She has built a culture of professionalism, dedication, and a client-first attitude that is the foundation of Sunstates Security. Kathryn also is responsible for every aspect of managing both the company and relationships with clients and partners, continually driving changes that lead to operational efficiencies and greater client satisfaction. As a certified WBE member and a member of ASIS International, she prizes accountability above all else at every level of Sunstates.

**Glenn P. Burrell, CPP**

*President*



Glenn learned law enforcement as an officer in London's Scotland Yard, pioneering a SWAT team in Norfolk, England, and as a leader guarding the Queen's private estate and royal family within the elite Royalty Protection Unit. He gained a wide range of experience with anti-terrorism activities, oil rig, and shipping intervention teams, unarmed combat, accident crime scene investigations, and SWAT team response. His extensive expertise is now part of the DNA of Sunstates Security, as is his dedication to the highest standards of client service. Glenn is a member of the American College of Forensic Examiners and ASIS International. He also holds the coveted Certified Protection Professional (CPP) designation from ASIS International and a Certificate in Terrorism Studies from the University of St Andrews.



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**Denis J. Kelly**  
*Chief Operating Officer*



Denis has worked in virtually every capacity over 30+ years in the security industry, beginning as a front-line officer and rising to a C-level executive position. Having seen the industry prize growth through consolidation over client satisfaction, he joined Sunstates Security to help build a security firm that believed in organic growth and maintaining a client-first philosophy, while treating employees as the trusted partners they are. An All-American college baseball player, he earned a BA in sociology and criminal law from Eastern Connecticut State University. He is a member of ASIS International, the International Facility Management Association (IFMA), and the Building Owners and Managers Association (BOMA).

**Robert Rogalski**  
*Senior Vice President of Operations*



A 20+ veteran of the security industry, Robert has been a manager at all levels. He has overseen security for clients in many markets, including corporate campuses, financial, pharmaceutical, healthcare, commercial properties, malls, government, educational and industrial sites. To ensure Sunstates Security clients receive the highest possible level of service, he is dedicated to providing security officers with the education, tools, and opportunities they need to excel. Robert graduated from the University of Maine at Augusta after studying Criminal Justice and Business Management. He is active in professional networking organizations, such as ASIS International, the International Facility Management Association (IFMA), and the Building Owners and Managers Association (BOMA).

**Ryan Moran**  
*Director of Quality Assurance*



Ryan began his career as a security officer, and over the past 20 years, his experience has spanned corporate offices and campuses, financial services, pharmaceutical, healthcare, retail, government, commercial real estate, and industrial settings. He is responsible for multiple quality assurance programs and strategies at Sunstates Security, ensuring that Sunstates continually exceeds its mission with every client. He studied Law Enforcement Science at the University of New Haven in Connecticut. Ryan participates in industry organizations such as ASIS International, where he has served as regional chairman for three years and on the board for five years; the Building Owners and Managers Association (BOMA);



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and the International Facility Management Association (IFMA).

### Roberta Scoblick

#### *Business Development and Marketing Director*

Roberta began her security career 33+ years ago as a file clerk while earning a BS in marketing from William Paterson University in New Jersey. She has managed successful marketing



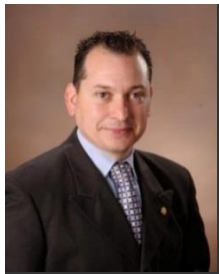
campaigns for a variety of regional, national, and international security firms, but far prefers Sunstates Security's ability to answer to its clients, not shareholders. Roberta has not only helped Sunstates provide custom-tailored security solutions for individual customers but also helps clients network, learn from each other, and share best practices. She holds professional memberships in ASIS International, the International Facility Management Association (IFMA), the Building Owners and Managers

Association (BOMA), Community Association Institute (CAI), North Carolina Association of Campus Law Enforcement Administrators (NCACLEA), and Institute for Supply Management (ISM).

### Robert Thurman

#### *Chief Financial Officer*

Prior to joining Sunstates Security, Robert was responsible for the finances of the world's second-largest



uniformed security guarding and integrated technology services company. At Sunstates, he provides strategic insights, financial management, and leadership to help Sunstates efficiently support security officers and clients. He earned his Bachelor of Business Administration in Finance and Accounting from Sam Houston State University in Huntsville, Texas, and earned a Master of Business Administration (MBA) at the University of North Carolina Kenan-Flagler Business School.

### Laura Hall

#### *Human Resources Manager*

A member of the Sunstates Security management team since 2016, Laura initially joined the



company as a corporate recruiter prior. Her strong work ethic and experience in recruiting, employee relations, organizational development, and benefits administration made her well-positioned to advance into the role of Human Resources Manager. In her current position, Laura has oversight of all employee policies and benefits, to include management of health care benefits, and oversees a team of three people. A graduate of the





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University of North Carolina at Wilmington, she holds a bachelor's degree in Business Administration and is a Board-Certified Associate Professional in Human Resources (aPHR).

### David Kleiman

#### *Legal, Compliance & Risk Management Director*

As Director of Legal, Compliance & Risk Management, Dave is responsible for all legal,



compliance, and risk concerns at Sunstates Security. He brings over 10 years of legal expertise to the corporate headquarters. He obtained his Juris Doctor from The John Marshall Law School and licensed to practice in the state of Illinois.

For several years Dave owned his own practice focusing on consumer, corporate, criminal, real estate, workers' compensation, and personal injury matters. He later transitioned to the corporate world, taking on large roles with two international companies. The first company-sponsored the Manchester United soccer team and is a global leader in human resources, insurance, and risk management. The second company produced many household items that many of us know and love, such as Oreos and Sour Patch Kids.

### Chris Burrell

#### *Corporate Support Manager*

With over a decade of experience, Chris has hands-on experience with all aspects of the



security industry. He began working with the company as a security officer in 2010 and over the next seven years was promoted to multiple positions of escalating responsibility to include Site Supervisor, Field Manager, and Operations Manager. Upper management recognized his potential and in 2017 Chris was promoted to his current position of Corporate Support Manager. In this role, he provides logistical support to corporate and regional management staff through vehicle fleet management,

procurement of equipment and supplies, and coordination of Information Technology and telecommunications support. Additionally, he is responsible for operations and facilities management for the Sunstates Security corporate headquarters. Chris holds a degree in Business Administration Management from East Carolina University, is a member of ASIS International, and is committed to ongoing education through industry professional organizations.





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### Kristine Correll

#### *Corporate Training Manager*



A member of the Sunstates Security team since 2018, Kristine initially joined the company as an Operations Manager. In 2019 she was promoted to Corporate Training Manager, a role in which she is responsible for the administration and efficient daily functioning of the Corporate Training & Safety Department. Primary functions include creating and coordinating new training materials, presenting training sessions to officers and management, and developing customer-specific curriculum and Standard Operating Procedures.

Prior to joining the contract security industry, Kristine worked in law enforcement in the Raleigh, NC Police Department. Beginning her law enforcement career as a Field Training Officer, she advanced to the role of Master Law Enforcement Officer, a role in which she documented investigations, utilized metrics to analyze trends and implement solutions and interacted in a diverse district addressing high-priority, multi-faceted issues. The combination of her law enforcement and training background, excellent customer service skills, and strong analytical aptitude transitioned well to the private sector and make her an excellent addition to the Sunstates Corporate Training & Safety Department.

### Valerie Taratino Setneska

#### *Compliance & Risk Coordinator, Facility Security Officer (FSO)*



Valerie is an Industrial Security Specialist with 15+ years of combined experience with personnel and facility clearance management. She has an established record of implementing U.S. Government security policies and maintaining security management programs for government contractors. An effective team member, she works collaboratively with applicants and project managers with clearance processes and requirements for multiple federal agencies. Valerie has excellent communication, organizational and problem-solving skills, detailed knowledge of US Government databases, and experience working with a variety of organizations.

Valerie holds an FSO Training Certificate from the National Security Training Institute in Chantilly, VA, and FSO and Insider Threat Training certifications through the Center for Development of Security Excellence (CDSE). She is active in local chapters of the National Classification Management Society (NCMS) and the Infragard National Members Alliance (INMA).



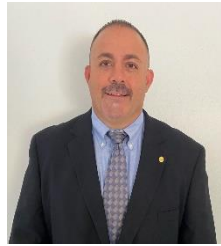
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## Regional Management Biographies

### *Fort Lauderdale Regional Office*

#### Michael Necolettos

##### *Regional Manager – South Florida*



Joining the Sunstates Security team in early 2019 as a Senior Operations Manager, Michael Necolettos brings with him over 26 years of experience in law enforcement and the private security industry. Beginning his career in law enforcement, Michael served for 15 years in a variety of roles and units prior to retiring as a Sergeant. Following his law enforcement career, he founded and managed his own business, ground transportation, and protective services company. While the business focus was initially based on transportation Michael utilized his previous law enforcement experience to expand into the field of private security services, including executive protection and corporate security consulting. In the six years of owning the business Michael worked in multiple capacities to include business development, strategic planning, operational functions, and budgetary management, and the company expanded to 55 vehicles across three states.

After selling his business Michael continued working in the security industry in a variety of roles to include Security Manager for a 20,000 seat sports and entertainment venue and Senior Operations Manager responsible for 40+ accounts and over 6,000 weekly hours in the heart of downtown Atlanta. During this time he gained a great deal of experience in managing large scale event security, as well as working with Class A facilities, gated communities, and mixed-use properties. The depth of Michael's law enforcement and private security industry, combined with his business acuity and proven management ability make him a strong addition to the Florida Sunstates management team.

Michael graduated from Penn State with a degree in Administration of Justice and is active in a variety of professional organizations to include ASIS International and the local chapter of The American Heart Association.

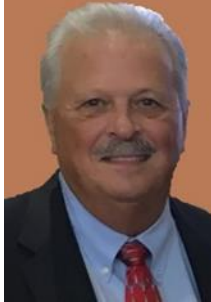


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## Bill Schira

### *Client Relations & National Accounts Manager – Florida Region*

Bill brings 28 + plus years of management experience in the security industry, coupled with several years of Law Enforcement & Military Law Enforcement prior to joining the private sector. Bill has widespread experience managing security programs in South Florida. His past roles in security management experience include providing services to Court Systems, multiple upscale Residential Communities, large Hospital Organizations, Government Agencies, Mass Transit, Critical Infrastructure facilities, Business, and Industry. He is also experienced in Disaster Preparation & Recovery.



Bill has been a Broward County Crime Stoppers Board Member since 1996. Throughout years of working in security, he has established excellent relationships with local, State, and Federal law enforcement throughout South Florida.

## Sheriff Al Lamberti, (Ret.)

### *Senior Consultant*

Al was former Broward County Sheriff, after 35 years of public service in an agency that managed law enforcement, fire rescue, security, and corrections he is transferring that experience to the private sector with Sunstates. As sheriff, he managed 6,300 employees and a \$750 million budget.



As sheriff, Al Lamberti oversaw security for the entire 17th Judicial Circuit Court and the Satellite Courts, Port Everglades, Fort Lauderdale-Hollywood International Airport, several Broward County municipalities, as well as the unincorporated districts within the County and the County Detention Facilities. Sheriff Lamberti (retired) successfully met these challenges by developing close partnerships with both the Public and Private sectors.

## John Cordts, CPP

### *Operations Manager*

Joining the South Florida Sunstates management team in 2017, John has over 33 years of experience in both law enforcement and private security. He began his career with the New York City Police Department, working in the Anti-Crime, Burglary, and Grand Larceny Auto Units, as well as specializing in community affairs and crime prevention. Following his 20-year law enforcement career, John became involved in contract security and has worked in a number of supervisory and management positions in a variety of industries. Notably, he





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has a great deal of experience working with ports and is very familiar with MARSEC and C-TPAT regulations and the steps required to ensure compliance. He previously worked with Sunstates at two large North Carolina ports, where he managed training and development of officers, ensured regulatory compliance, and served as liaison with the US Customs Border Patrol and the NC State Port Authority Police. John's broad experience combined with strong leadership capabilities, program implementation, and management skills, and expertise in assessing identifying safety issues and implementing security resolutions, give him a unique perspective on providing security solutions and make him an excellent addition to the South Florida team. John is an active member of ASIS International and holds the prestigious designation of ASIS Certified Protection Professional (CPP). He is CPR / First Aid certified and holds multiple FEMA certifications.

**Michael State**  
*Operations Manager*



A member of the Sunstates Security team since 2015, Michael initially joined the company as a Site Manager for a large retail client, a position in which he managed all aspects of the site to include hiring and training officers, coordinating support services, and interacting directly with the client. He was promoted to Operations Manager in 2017 and now oversees multiple client locations, ensuring contractual compliance and customer satisfaction, as well as providing management oversight and support.

Michael has over 24 years of management experience that includes positions in the retail and financial sectors as well as contract security. He is a strong leader with a demonstrated knowledge of developing performance-based, cost-effective solutions based on team cohesiveness, and superior service delivery. Notably, throughout the course of his career, he has received recognition and awards in all his roles, reflecting his commitment to excellence in team building and service excellence. His organizational leadership capabilities, industry experience, and customer-centric focus provide him with a valuable skill set that supports the company's Mission and Vision and make him a valued member of the South Florida management team.

Michael holds Florida State D & G licenses, and also has an Assisted Living Facilities Certification through the State of Florida.



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**Steve Ropizar**  
*Operations Manager*



Joining the Sunstates Security team in October of 2019 as an Operations Manager, Steve Ropizar brings with him over 16 years of experience in the private security industry. He initially entered the industry as a private security escort in New York City, moving to event management for large venues, and finally to security operations management. His experience covers multiple vertical markets to include residential, medical/pharmaceutical, and large-scale construction venues. Prior to pursuing a career in physical security, Steve worked as a Network Administrator on the New York Stock Exchange and was a Certified Microsoft Network Administrator and Software Engineer. His

experience working with technology security and compliance served as an excellent base upon which to develop his career in physical security operations.

Steve holds a bachelor's degree in Criminal Justice and Corrections from Ashford University. His strengths include risk assessment and compliance, training, and development, overtime management, and policy design/implementation. Responsible for the oversight of all hiring, training, management, and scheduling of a team of armed and unarmed officers as well as serving as primary liaison with a portfolio of clients, his technological background, ability to multi-task, and strong communications capabilities serve him well in his current role of Operations Manager.

**Christopher Kelleman**  
*Operations Manager*



A relatively new member of the Sunstates Security team, Chris has over 24 years of experience as a security professional. Beginning his career as a Task Force Investigator for a large retailer, Chris has moved through a progression of management roles progressively increasing in level of responsibility and visibility. In his most recent role, he served as a District Manager responsible for a portfolio worth \$5M in annual revenue and spanning multiple vertical markets to include government, technology, and manufacturing. Prior to that, he served

as a National Accounts Manager overseeing all operations for two large national clients representing \$17M in annual sales while maintaining a 98%+ service delivery for over 14,000 unique service requests per month. Chris is highly experienced in all aspects of the contract security business to include customer relations, security operations, performance metrics, and strategic budgeting, and a proven record of exceeding performance goals and ensuring successful partnerships.



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Chris is an active member of ASIS International and holds numerous accreditations to include OSHA 10 Hour General Industry Certification, Rutgers University Incident Command 100 Certification, and Axis Communications Certified Professional and First Aid/CPR Certification. He is fluent in Spanish and holds a Florida Security Agency Manager, MB License as well as a US Transportation Worker's Identification Card (TWIC).

## Experience and Qualifications – II

Sunstates Security has been providing quality security services since 1998. The projects below while not all located in Fort Lauderdale are similar in size and complexity of the City of Fort Lauderdale, Florida. They are indicative of our customer-centered service and project-based approach to serving stand-alone accounts. We believe our approach provides the best of proprietary-like benefits and contracted service advantages. These are current long-standing clients: **City of Charlotte, N.C.** – government agency providing armed and unarmed security guard services at several city and county facilities to include the Mecklenburg County Courthouse; **Public Works Commission of the City of Fayetteville, N.C.** – government agency providing security services for Operations Complex, Operations Center, Customer Service Center and Water Generation Plant; **State of Delaware** – government agency providing security services to 44 locations statewide. The sites consist of libraries, Department of Labor, Child Support and Family Visitation Centers, a data center, rest stop, courthouses, community centers, Department of Natural Resources and Environmental Control. The services that are provided are access control, badging, reception services and patrols; **Jewish Federation of South Palm Beach County** – provide armed security services for a 100+ acre guard gated campus. The facility houses multiple support agencies, 3 schools with over 2,200 students, a Jewish Community Center, a special needs training center, and just over 400 individual apartments, plus coverage for many Special Events; **City of Savannah, GA** – government agency providing security services for the city government buildings, museums, industrial, water supply plant and critical work force shelter.

The City of Fort Lauderdale's transition will utilize our time-tested transition strategy to create a turnkey system for effectively meeting the City of Fort Lauderdale's timeline and budget requirements. During the transition process at each site, the operations management team and our corporate trainer conduct a safety assessment. Following the safety assessment, we work with the client to develop a safety training curriculum based on safety needs and issues identified through the safety assessment.

Although variables change from client to client and site to site, the following elements of the transition process are constants.





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- Meetings with Client
- Launch of Recruitment Activities
- Ordering of Uniforms, Accessories, and Other Equipment
- Development of Standard Operating Procedures
- Development of Training Guidelines

The system is flexible, allowing us to customize the details and specifics in a client-centric approach to each site transition.

#### *Sunstates Security Policies on Energy Consumption*

#### *Material Chemical Waste Policy, Sustainable Procurement*

Sunstates Security provides security guard staffing services and does not develop or manufacturing any products. We take every effort to conserve energy consumption whether in our corporate and branch offices as well as on client sites that we serve. Additionally, we strive to recycle wherever possible. The following are examples of our initiatives:

#### **Save Paper**

- We will save paper by using technology
- Print only what is needed by utilizing [www.printgreener.com](http://www.printgreener.com)
- We encourage our officers to reuse paper when paper is required
- Marketing material is digital
- Proposals are emailed whenever possible versus printing
- Contracts are all done digitally
- Storage of documents are all digital saving paper, ink and office supplies and space

#### **Recycle**

- Re-issue of officer uniforms for new officers or replacement uniforms
- Officers will reuse paper or use recycled paper
- Install recycle bins
- Utilize printer cartridge companies that recycle old cartridges
- Properly dispose of batteries
- Use rechargeable flashlights where possible
- Use dishes and glassware that can be washed versus disposable

#### **Conserve Energy**

- Turn off lights that are not required to be in use

- Use online calculators
- Report any leaks in faucets or pipes
- Utilize high efficiency appliances to reduce energy consumption
- Uniforms are washable and do not require dry cleaning services

- Do not buy new computers-trade up
- Reuse of phones
- Reuse of office equipment
- Recycling of equipment through vetted sources
- Purchase reusable marketing material for tradeshow
- Uniforms and office supplies are shipped using recyclable boxes

*National Certified Women's Business Enterprise and qualified as a member of the Florida Business Development Council of Florida*

**WBENC**  
WOMEN'S BUSINESS ENTERPRISE  
NATIONAL COUNCIL

JOIN FORCES. SUCCEED TOGETHER.

hereby grants

**National Women's Business Enterprise Certification**

to

Sunstates Security, LLC

who has successfully met WBENC's standards as a Women's Business Enterprise (WBE).  
This certification affirms the business is woman-owned, operated and controlled and is valid through the date herein.

Certification Granted: September 30, 2010  
Expiration Date: September 30, 2021  
WBENC National Certification Number: 2005116481

WBENC National WBE Certification was processed and validated by Greater Women's Business Council, a WBENC Regional Partner Organization.

*Roz Lewis*

Authorized by Roz Lewis, President & CEO Women's Business Center



NAICS: 561612, 561611  
UNSPSC: 92120000, 92121504





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**Sunstates Security Corporate Office**

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Robb Rogalski, Senior Vice President of Operations

**Sunstates Security Fort Lauderdale Office**

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Michael Necolettos, Regional Manager

**Sunstates Security employees 3,027 employees throughout the United States.***Registered as a legal entity in the State of Florida as Broward County Registered Business***2020 FOREIGN LIMITED LIABILITY COMPANY ANNUAL REPORT**

DOCUMENT# M02000001668

**Entity Name:** SUNSTATES SECURITY, LLC**Current Principal Place of Business:**SUNSTATES SECURITY, LLC  
801 CORPORATE CENTER DRIVE SUITE 300  
RALEIGH, NC 27607**Current Mailing Address:**801 CORPORATE CENTER DR  
SUITE 300  
RALEIGH, NC 27607 US**FEI Number:** 58-2053968**Name and Address of Current Registered Agent:**C T CORPORATION SYSTEM  
1200 SOUTH PINE ISLAND ROAD  
PLANTATION, FL 33324 US**FILED**  
**Mar 18, 2020**  
**Secretary of State**  
**9647928238CC****Certificate of Status Desired:** No*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 :**

<b>Title</b>	MGR	<b>Title</b>	MGR
<b>Name</b>	BURRELL, GLENN	<b>Name</b>	BURRELL, KATHRYN
<b>Address</b>	801 CORPORATE CENTER DR, SUITE 300	<b>Address</b>	801 CORPORATE CENTER DR, SUITE 300
<b>City-State-Zip:</b>	RALEIGH NC 27607	<b>City-State-Zip:</b>	RALEIGH NC 27607
<b>Title</b>	COO	<b>Title</b>	VP
<b>Name</b>	KELLY, DENIS	<b>Name</b>	ROGALSKI, ROBERT
<b>Address</b>	801 CORPORATE CENTER DR SUITE 300	<b>Address</b>	801 CORPORATE CENTER DR SUITE 300
<b>City-State-Zip:</b>	RALEIGH NC 27607	<b>City-State-Zip:</b>	RALEIGH NC 27607
<b>Title</b>	CFO	<b>Title</b>	AUTHORIZED REPRESENTATIVE
<b>Name</b>	THURMAN, ROBERT	<b>Name</b>	HOOD, DAEJIA CHANELL
<b>Address</b>	801 CORPORATE CENTER DR SUITE 300	<b>Address</b>	801 CORPORATE CENTER DR SUITE 300
<b>City-State-Zip:</b>	RALEIGH NC 27607	<b>City-State-Zip:</b>	RALEIGH NC 27607

I hereby certify that the information provided 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, and I am a member, officer or manager of the limited liability company or the partner or limited entrepreneur of a limited liability partnership registered by Chapter 555, Florida Statutes, with multiple state appointments, or an agent authorized with additional state appointments.

**SIGNATURE:** DAEJIA CHANELL HOOD**LEGAL & COMPLIANCE  
MANAGER****03/18/2020**

Electronic Signature of Signing Authorized Person(s) Detail

Date

Confidential

12/21/2020



BidSync

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CAM 21-0378  
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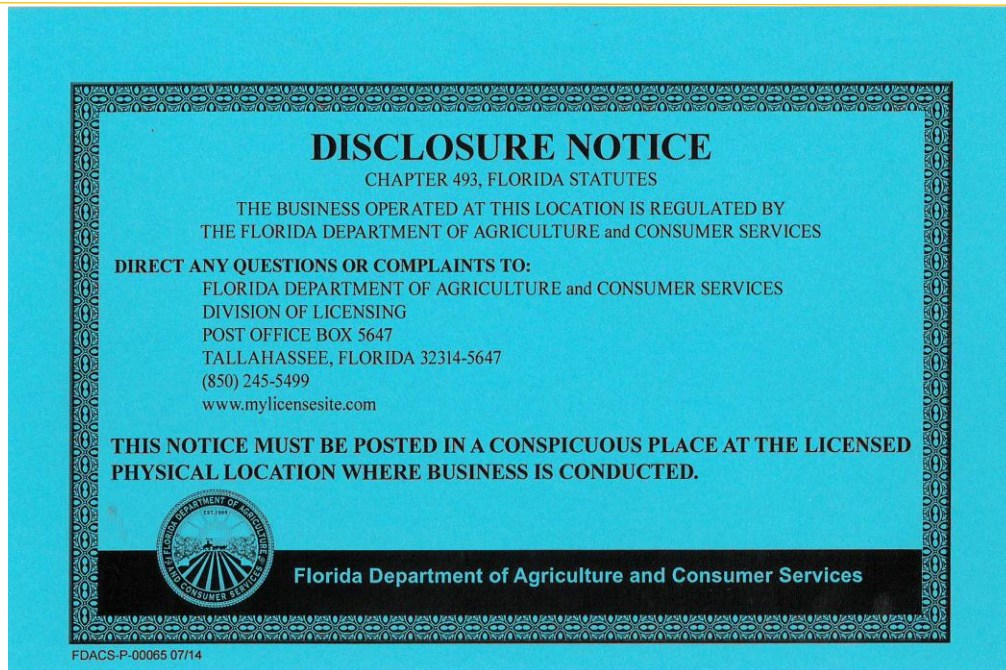
*Class B Security Firm License*

<b>FLORIDA DEPARTMENT OF AGRICULTURE AND CONSUMER SERVICES</b>		
NICOLE "NIKKI" FRIED COMMISSIONER		
DIVISION OF LICENSING		
04/17/20 DATE ISSUED	05/09/23 DATE OF EXPIRATION	B 2100089 LICENSE NUMBER
<b>SUNSTATES SECURITY, LLC</b> 1000 WEST MCNAB ROAD SUITE 300 POMPANO BEACH, FL 33069		
BURRELL, GLEN P., DIRECTOR BURRELL, KATHRYN J, OTHER		
THE SECURITY AGENCY NAMED ABOVE IS LICENSED AND REGULATED UNDER THE PROVISIONS OF CHAPTER 493, FLORIDA STATUTES.		
	 NICOLE "NIKKI" FRIED COMMISSIONER	

THIS LICENSE MUST BE POSTED IN A CONSPICUOUS PLACE AT THE LICENSED PHYSICAL LOCATION WHERE THE BUSINESS IS CONDUCTED. THIS LICENSE IS VALID ONLY FOR LOCATION NAMED THEREON AND IS NOT TRANSFERABLE. YOU MUST REPORT ANY CHANGES OF NAME OR ADDRESS TO THE ADDRESS LISTED BELOW (\$10 FEE REQUIRED). AT LEAST 90 DAYS PRIOR TO THE EXPIRATION DATE SHOWN ON THIS LICENSE, A RENEWAL NOTICE WILL BE SENT TO YOU. IF FOR ANY REASON YOU HAVE NOT RECEIVED YOUR RENEWAL NOTICE, FORWARD A COPY OF THIS LICENSE WITH THE PROPER FEE TO THE ADDRESS BELOW. LICENSES MUST BE RENEWED ON OR BEFORE THE DATE OF EXPIRATION OR A LATE FEE EQUAL TO THE AMOUNT OF THE LICENSE FEE WILL BE IMPOSED.

FLORIDA DEPARTMENT OF AGRICULTURE AND CONSUMER SERVICES  
DIVISION OF LICENSING  
POST OFFICE BOX 5767  
TALLAHASSEE, FL 32314-5767

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*Class MB Manager Licenses*

William B. Schira M 9600007



Michael Necolettos M 1900057



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12/21/2020

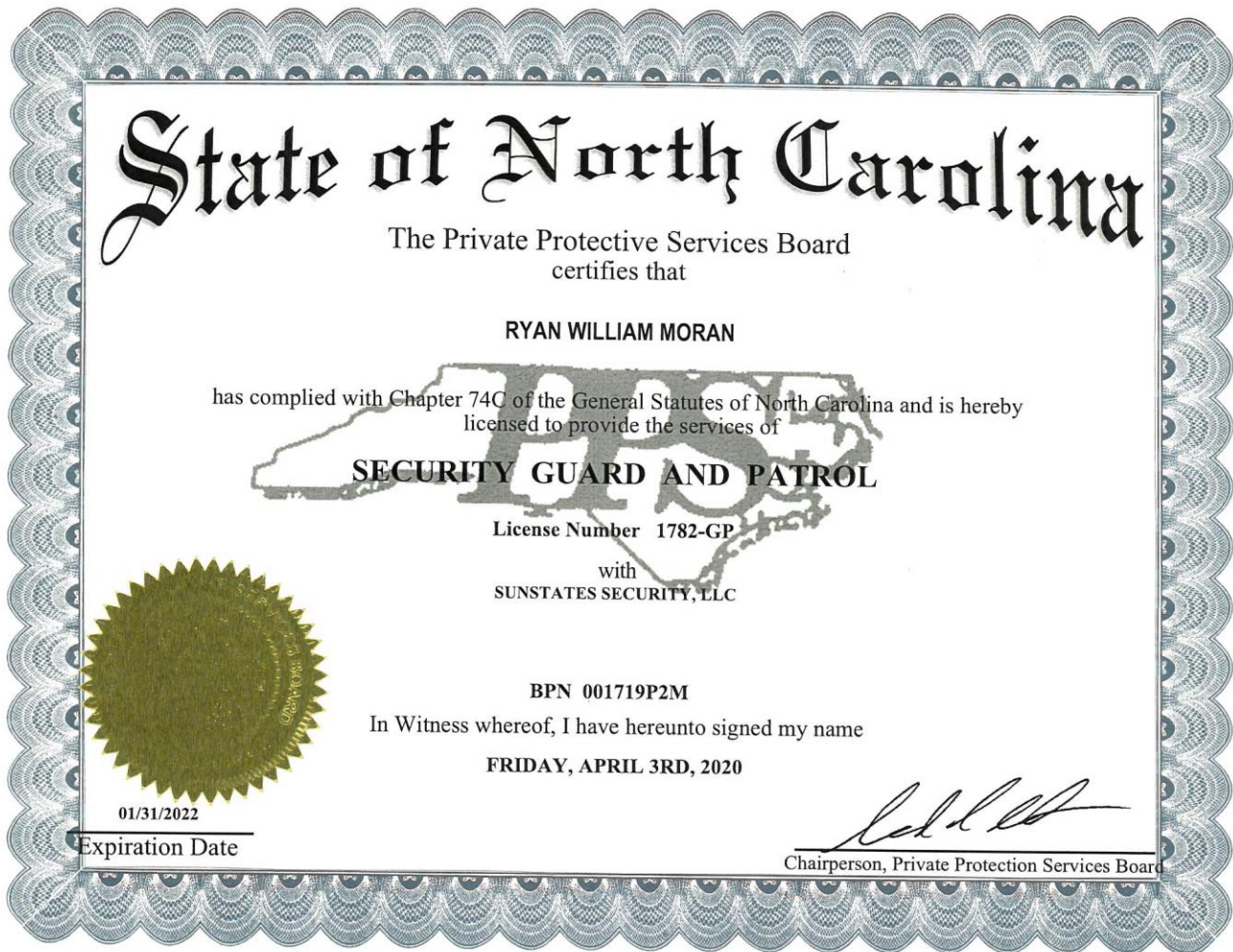
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*State of North Carolina License**Employee Benefits and Incentive Program*

Sunstates Security offers an unprecedented benefit package to our employees that **exceeds** industry standards, including major medical coverage to supervisors at no cost, and a 401(k) program that includes an employer match. Our enhanced benefit program is designed to attract and retain quality employees by investing in them on the front end versus paying costs associated with high levels of attrition.

We continuously re-visit and re-evaluate our benefits and incentive program to ensure that it remains reasonable, compliant, and appropriate for the level of employee on whom we are willing to stake our reputation and your safety and protection. A description of benefits and



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incentive options available to our employees is set forth below.

### *Health Care Options*

#### *Health Care Options for Security Officers:*

##### *ACA Compliant Medical Plan*

Sunstates offers two options for officers, the Minimum Essential Coverage (MEC) Plan, and the MEC Care plan. **Sunstates pays 51% of the premium for the employee preventative plan and contributes that same dollar amount to those that upgrade to the MEC Care plan.** The MEC Plan satisfies the individual mandate, covers a wide range of preventative and wellness care procedures at no cost to the insured, and does not require a deductible, copays, or coinsurance. Officers also have the option to enhance this coverage with Accident and Critical Illness Coverage and/or a Hospital Indemnity Plan.

Officers also have the option of buying up to the MEC Care Plan, which covers a wide range of preventative and wellness care procedures at no cost to the insured, as well as physician office visits and prescriptions. All officers have 24-hour access to Teledoc which provides the opportunity to speak with a licensed physician on the phone, and, if appropriate, get a prescription. Disability, AD&D, Dental and Vision options are also available to all officers.

##### *Dental Insurance Program:*

Security Officers have access to dental insurance through Lincoln Financial. Preventive services are covered by the plan at 100% and other services are covered with coinsurance.

##### *Vision Benefits Program*

Security Officers have access to vision benefits through Spectera. The program is provided through a nationwide network and provides benefits for examinations, lenses, frames.

#### *Health Care Options for Site Manager / Supervisor*

##### *Major Medical Plan:*

All supervisors managing accounts greater than 168 hours per week will be provided with health care coverage through a major medical plan through United Healthcare **at no cost to the employee** for single person coverage. Supervisors also have the option of buying up to enhanced plans and adding additional family coverage. There are four plans to select from, all of which include physician co-pays, prescription co-pays, hospitalization, and emergency room care. They are also offered disability, voluntary life, Teledoc services, dental and vision.



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#### *Dental Insurance Program:*

Site Supervisors / Managers have access to dental insurance through United Health Care Dental. This voluntary PPO plan covers preventative visits at 100% and other services at varying percentages after meeting the deductible.

#### *Vision Benefits Program*

Site Supervisors / Managers have access to vision benefits through United Health Care Vision. The program is provided through a nationwide network and provides coverage for examinations, lenses, frames.

#### *Other Benefits*

- *401K Plan with Employer Match*

Sunstates is proud to offer the Sunstates Security Retirement Savings Plan in partnership with Empower. The company's 401k plan allows employees to save money for retirement on a pre-tax basis. As an incentive for saving and to reward those who participate, ***Sunstates Security offers an employer matching contribution of 25% (\$0.25 for every \$1.00 invested), up to 8% of their pay.*** The enrollment process is simple, and employees have the option to enroll bi-annually after the completion of one year with the company and at least 1,000 hours worked.

- *Life Insurance & Short-term Disability Insurance*

Employees are provided term Life and AD&D insurance coverage at no cost to the employee. Amount of coverage is based upon employee tenure and provides \$5000 coverage for employees with less than five years of employment, and \$10,000 for employees with over five years of employment. This is a term policy which does include a benefit step down after age 65.

- *Paid Vacation & Bereavement Leave*

Full-time employees earn one-week paid vacation after the first year of employment and up to three weeks paid vacation after five years of employment. Additionally, employees are provided paid time off for the unfortunate loss of an immediate family member following one year of employment.

- *Holiday Pay*

Hourly employees working on any of the following holidays will be paid at 1.5 times their regular pay rate.

- Memorial Day
- Independence Day
- Labor Day

- Thanksgiving Day
- Christmas Day
- New Year's Day

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The above holidays *as well as other contractually stipulated holidays* can be invoiced as they occur or included in the regular invoice rate. Unless otherwise specified, holidays are invoiced as they occur at 1.5 times the normal rate.

- *Direct Deposit or Pay Cards*

Sunstates employees enjoy convenient access to their paychecks through direct deposit or Visa pay cards to assure immediate access to their earned compensation without delay.

- *Employee Assistance Program*

Sunstates Security understands that stress caused by work, personal or financial problems can have a profound effect on the health, happiness, and productivity of our employees. Sunstates is proud to offer an employee assistance service that provides an outlet to discuss work or personal issues and provide short term counseling at no cost to the employee. Employees may contact a qualified counselor 24/7 to assist with any type of individual or family problems, including financial issues, marital counseling, childcare or dependent counseling issues, substance abuse issues within the family, or any other type of problem that is causing a negative impact on their health and/ or quality of life.

- *Credit Union Enrollment*

Sunstates Security offers employees an additional financial benefit through an optional membership with Allegacy Credit Union. Credit unions typically pay higher yields on savings, offer more competitive loan rates, and charge lower service fees than commercial banks, and are often the most economical way to achieve common financial goals. The benefit is transferable, so membership remains active even if the member transfers employment or retires.

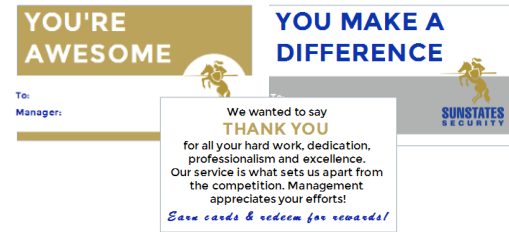
### *Incentive Program*

We have a robust incentive program in place to recognize and reward our employees for outstanding performance. These incentives have proven highly effective at motivating our employees at all levels to stay with our company and excel in their duties.

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#### ⊕ Sunstates Employee Appreciation Program

Understanding that our employees are what drive our success and set us apart from our competition, Sunstates recently rolled out an Employee Appreciation program to recognize security team members for hard work, dedication, and professionalism. During site visits, Sunstates Managers will pass out appreciation cards recognizing officers for a job well done. The cards can be accrued and redeemed for Sunstates logo items. Most importantly, the Employee Appreciation Program provides positive reinforcement for good performance, reminds officers of the difference they make, and lets them know that they are valued and respected as a part of the Sunstates Security team.



#### ⊕ Employee and New Business Referral Bonuses

Employees who have referred candidates to Sunstates for employment will receive up to fifty dollars for each employee referred following successful completion of 180 days of employment. Hourly employees referring a qualified new business lead that leads to a sale will receive a onetime bonus following the first 30 days of service equivalent to \$1.00 for each hour per week of the new account.

#### ⊕ Employee of the Month Award

Outstanding employees are nominated by their immediate supervisor or manager on a monthly basis for extraordinary performance. The selected recipient each month receives a monetary award as well as recognition in the company newsletter with a photograph and documentation of his or her achievement.

#### ⊕ Education Reimbursement

We offer and encourage our people to take advantage of educational opportunities, tools and resources that are essential for professional growth and development. Sunstates offers employees reimbursement for higher education learning up to \$1,000 dollars per year for pre-approved and successfully completed course work. We continually provide access to other learning materials and support our employees need to expand their expertise and proficiencies, build skill sets, and ultimately achieve their personal career goals.

#### ⊕ Service Awards

We reward employees after two years of service with an annual holiday bonus. Additionally, we honor our loyal employees after five years of service with special certificates and a gold Sunstates lapel pin. Employees with ten years of service receive special certificates including monetary.



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#### ⊕ Employee Involvement Initiatives

We distribute Sunstates newsletters at every site to foster appreciation and awareness of our company culture, and we hold employee meetings every month to promote and encourage team involvement, team pride and team loyalty. We also sponsor special functions such as barbecues and pizza parties in honor of outstanding inspections and other noteworthy achievements.

#### ⊕ Management Mentoring and Support

Our management professionals employ a motivational, mentoring approach that is in and of itself an incentive to deliver extraordinary performance. With managers visiting each site several times per month, our employees know they are under close observation and they take pride in earning the notice and approval of the management team.

Each employee's performance is evaluated on an annual basis, at which time Sunstates strives to provide merit increases tied to documented individual performance. Our site management team conducts the employee evaluation and review, informed by feedback from clients when possible.

#### ⊕ Career Advancement

As our company continues to grow, new positions and opportunities are opening up every day at all levels of our organization. The supervisors and managers working alongside our officers have risen through the ranks themselves and are living proof of Sunstates' commitment to promoting from within.

Of all the benefits and incentives, we offer our employees, we believe those that ultimately have the greatest impact on employee retention, satisfaction and performance are career advancement and continuing education, which go hand in hand with one another.

We have been extraordinarily successful at retaining our people, and we attribute that success in large part to our training resources and support. We ensure that every person on our staff is thoroughly competent and confident, and we encourage them to embrace new challenges and pursue every opportunity for professional growth and advancement.

### **Approach to Scope of Work – III**

Sunstates Security understands the needs, goals, and objectives of the City of Fort Lauderdale as they relate to the project. We have transitioned many similar government agencies throughout the United States. In the following section we go into depth on our overall time-tested approach and methodologies to accomplishing the needs of this project.

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### *Recruiting*

We begin first to cast a wide net to find the right people – people who will project the right impression for your unique environment. We are extremely proud of our paperless application and onboarding process. This streamlines our process minimizing admin time for our management teams, improves accuracy and accountability and furthers our dedication to “green” initiatives. Our management team will recruit and hire based on your culture and your priorities, whether you need friendly faces to greet and interact with your staff and visitors, a more serious presence to actively deter threats, a little of both, or something in between.

### *Incumbent Staff*

With your approval, we welcome and encourage incumbent officers to continue their service as Sunstates Security officers, assuming they meet our hiring criteria. We prefer to retain account expertise and continuity wherever possible, and quality incumbent personnel can be instrumental during a transition.

### *Current Sunstates Employees*

We regularly transfer or promote existing employees for open positions at new accounts. We like to maintain a balanced ratio of new and experienced officers, so newer team members always have access to the guidance and direction of seasoned staff members.

### *Other Recruiting Sources*

The following are some of the many resources we draw on to recruit candidates for positions not filled by incumbent staff or through internal recruiting.

- Veterans Services: Sunstates Security makes specific effort to employ veterans whenever and wherever we can and have signed a statement of support to the Employer Support of the Guard and Reserve (ESGR), an initiative of the U.S. Department of Defense (DoD).
- Colleges including seminary colleges
- Churches, councils, military bases
- Retired law enforcement and correction officers
- Out-placement military posts
- Fire department and emergency services personnel
- State and local employment commissions
- Referral bonus plan for current employees
- Online recruitment boards and internet postings
- Targeted job fairs and newspaper listings



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### *Security Screening & Selection Process*

Sunstates Security sets unusually high standards for employment, with screening practices and hiring criteria that exceed the requirements of most clients and licensing authorities. The following screening measures are performed **in addition to** any specific checks required by individual state licensing authorities.

### *Application and Interview Summary*

Sunstates screens for applicants who are well suited in personality, and who have the appropriate skill set to be successful in the security field. Sunstates utilizes the following measures to help determine the suitability of an applicant for available position openings:

- 107 Question pre-application personality profile questionnaire
- Online application integrated with the Sunstates Applicant Tracking system
- Telephonic and in person interviews
- Verification of fluency and communication skills
- Skills/aptitude testing, depending on the specific job placement characteristics

Following the application and interview process, suitable candidates will continue through the background investigation phase.

### *Background Investigation*

- **Social Security Number (SSN) Trace:**
  - Verification and validation of identity and addresses of past residences
- **DHS E-Verify Check:**
  - Validation of citizenship and legal authorization to work in the United States
- **Criminal Background Checks** with enhanced search parameters:
  - Enhanced nationwide criminal history search using name and date of birth to search where the applicant has *resided, worked, or travelled*
  - Supplemental search of over 2,000 US booking and incarceration sites for any information that might not have been picked up in other databases
  - Sex Offender Registry check: searches of the Federal Department of Justice, which includes real time listings of registered sex offenders for 50 states
- **Drug Screening:**
  - 10 panel urinalysis
  - Performed in SAMHSA-certified laboratory with fully documented chain of custody procedures

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- **Motor Vehicle Records (MVR) Background Check:**
  - Required for all officers with driving assignments

The above background investigation results are carefully reviewed by the Corporate Legal & Compliance Department prior to authorization for hire being made and are in full compliance with Federal, State & Local laws including the Fair Credit Reporting Act (FCRA).

Note: Sunstates is also equipped to customize and enhance any of the above criteria up to what is legally allowable.

### *Ongoing Random Drug Screening*

All employees are subject to computer generated random drug screening, with two 2% of employees randomly screened each month (24% annually).

### *Conclusion*

We know the best people in the security profession, even the most promising entry-level candidates, have plenty of attractive options. We have structured our operation to attract the choicest candidates and to empower and reward their growth, so they move up within our ranks, rather than moving on.

Candidates begin to get a feel for our company culture and the unique opportunity at their fingertips early on in the hiring process. The in-depth interviews, the extensive background checks, the reference checks and drug screening and aptitude testing – these go a long way toward painting a picture of Sunstates as a firm where only the elite need even apply.

### *Training*

Security officers need proper training and development to internalize what they learn, so that under fire, their automatic, instinctive responses will be right on target. They do not stop to deliberate or consult handbooks when confronted with a security issue or threat. They move swiftly, putting into action lessons absorbed through countless hours of training, drills, and preparation.

You can depend on Sunstates Security to staff your site with a team that has been trained to this standard. Under the visionary leadership of Sunstates President, Glenn Burrell, our Corporate Training Manager has designed and implemented a powerful, results-oriented training program that effectively meets the needs of our entry-level security officers on up to senior account executives.



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The strategy for the training program evolved out of more than 25 years of industry experience. Instead of taking a one-size-fits-all approach to training, we have an extensive, steadily expanding library of available courses that we consider to be the building blocks for an effective training program. During the transition process, our trainer works with the operations management team and the client to identify the best combination of building blocks – training courses – to train security officers to the specific requirements of the site. In this way, we custom-develop the training curriculum for each site from the ground up.

Our Legal & Compliance Department confirms that every Sunstates officer meets the program requirements, which encompass a variety of content as mandated by the state and as mutually agreed upon by the client and Sunstates.

As a Sunstates client, you can rest assured that every officer on your team meets a rigorous training standard and is fully prepared for the challenges of the assignment. Below is a graphic representation of the Sunstates three- tiered training program.

### Sunstates Training Process

*Level I:  
New Hire*



### *Orientation and Training*

As explained below, we go above and beyond the state-mandated requirements to ensure that our officers are fully informed and competent.

#### ⊕ **Basic Training:**

We conduct training in full compliance with each state's unique regulations, but what sets us apart is our commitment to making sure the training is both pertinent and effective.

A Sunstates trainer works with the client and the operations management team during the transition process to plan a curriculum that takes maximum advantage of state-mandated training hours, whether the site is in a state that requires 8 hours of initial training, 40 hours, or somewhere in between. This training covers essential security fundamentals and includes instruction in report writing, communication, deportment, legal issues, emergency response, patrol techniques and more.

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Topics specific to the client and the site may be covered as well.

Once the curriculum is agreed upon, the training is delivered in a classroom setting by a live instructor, using a hands-on approach to learning.

For instance, if the lesson is on report writing, security officers actually practice writing reports. The trainer carefully reviews their efforts, providing constructive feedback, and the officers repeat the exercise until their reports are flawless.

If the instructor is teaching officers how to correctly approach and inspect a vehicle, the instructor might first cover the content through a lecture, then demonstrate and reinforce the material visually with a PowerPoint presentation, and finally take the officers outside to practice their techniques on a real vehicle.

Our hands-on approach ensures that security officers actually *master* the material. State regulations do not normally specify *how* training is to be conducted, and many security providers simply expose their people to ineffective methods for a state-specified number of hours over a specified period of time.

We custom-build the course selection to suit each client and the particular demands of the site. Then a live trainer presents the material and holds each and every officer accountable for truly understanding the content, using role plays, training scenarios, drills, and other training strategies to effectively ensure genuine competency and skills-building.

#### ✦ Sunstates-Mandated Basic Training - SOLO

Above and beyond the state-mandated training requirements, we require every officer to complete Sunstates Officers Learning Online (SOLO), a 12-module internet-based training course. SOLO modules cover topics such as harassment, proper disciplinary procedures, workplace violence, and the Standard Operating Procedures (SOP).

Covering selected topics through SOLO modules allows us to make optimal use of the state-required training hours. Since we do not have to devote classroom hours to content covered by SOLO, our instructors can focus their classroom efforts on material where the hands-on approach will have maximum impact.

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Officers are provided a user name and password to access the SOLO courses through [www.SunstatesSecurity.com](http://www.SunstatesSecurity.com). Officers can complete this training from home or, with the client's permission, from work. The modules can be completed online or through printed hard copies.

SOLO courses are self-paced and may require anywhere from 8-12 hours to complete, depending on the individual. Officers complete the modules in a designated order and must pass a quiz on each module with a score of 100% to continue on to the next module.

#### ⊕ Sunstates Accident Free Environment (SAFE) Training

Our safety program and the associated training are based on the precept that any injury can be prevented. Through our SAFE training program, we educate officers on their responsibility to work safely and to strive to prevent injury to themselves and others. We make our officers aware of unsafe acts people commit, and we teach them to identify unsafe working conditions, recognize safety issues and respond appropriately. A Sunstates Safety Manual is kept at every client site, and every Sunstates security officer must read the Safety Manual as part of our mandatory safety training.

During the transition process at each site, the operations management team and the trainer conduct a safety assessment. Following the safety assessment, we work with the client to develop a safety training curriculum based on safety needs and issues identified through the safety assessment.

Our training library includes an abundance of self-guided, web-based, and paper-based training courses to support site-specific safety training, on topics such as Hazard Communication, Personal Protective Equipment, Reporting Injuries, Back Lifting/Safety and much more.

#### ⊕ Specialized Training

Your custom-designed training program can include any number of specialized courses. Our certified instructors routinely provide specialized training for security personnel on topics such as:

- Serving as a Concierge or Public Ambassador
- OC pepper spray
- Tactical handcuffing
- Tactical baton
- CPR and AED
- Basic First Aid
- Certified defensive driving techniques
- Hazard Communication
- Blood Borne Pathogens
- Defensive tactics for Security Officers
- Advanced search and evidence gathering techniques

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These are all classroom courses taught with the hands-on approach that characterizes the Sunstates training method. Officers actually put their hands-on handcuffs, training batons, striking bags, and other equipment. Our in-house, certified trainers carefully coach the officers on proper techniques and then observe the officers in action, providing constructive criticism and ensuring that each individual fully develops the proficiency required for certification.

### *Level II: Site-Specific Training*

Our security team at each site relies on two critical resources for site-specific training, the Standard Operating Procedures (SOP Manual), and the Employee Education and Training Record. Sunstates identifies and develops a recognized trainer at each client facility to provide continuity across the site operation. Each officer receives a minimum of 16 hours of site-specific training administered by the site trainer (in some cases up to 40 hours) before ever performing a duty alone.

#### ⊕ **Site-Specific Standard Operating Procedures (SOP) Manual**

The basis for site-specific training is the customized, site-specific Standard Operating Procedures (SOP) Manual, created during the start-up process at each site. A Sunstates trainer is always intimately involved in developing the SOP Manual for each site. To ensure a consistent and comprehensive approach, the trainer uses Sunstates' general SOP as the foundation for the site-specific resource. Beginning with the general SOP, the trainer adds extensive site specifics, including photographs, diagrams, and detailed directions.

Our trainers have extensive experience translating site protocols and procedures into clear, easy-to-follow instructions for security personnel, using our standardized company SOP format. They use the finalized, site-specific SOP as a blueprint for establishing a training checklist for the officers assigned to the site.

#### ⊕ **Employee Education and Training Record**

As its name indicates, the Employee Education and Training Record is a form used to document training completed by each security officer. As each course, module or lesson is completed, the employee signs and dates the form, and the trainer or manager countersigns the form, verifying that the employee has satisfactorily completed the training under his or her supervision. The form is customized for each site to include a detailed training checklist that mirrors the contents of the site-specific SOP.

New officers study the site SOP and complete the training checklist with hands-on guidance, support, and direction from senior team members. When the new officer is comfortable with the material presented in the SOP, he or she is tested on each item on the training checklist. The test serves as a safety net; either confirming that the officer has mastered the required material or indicating particular areas the officer should review to achieve the requisite competency.



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Employee Education and Training Records are maintained at the site and are available at any time for review by the client and visiting managers and auditors.

### *Level III: Supervisory & Management Training*

Level III training is geared toward employees in supervisory or management positions or employees interested in advancing into leadership roles.

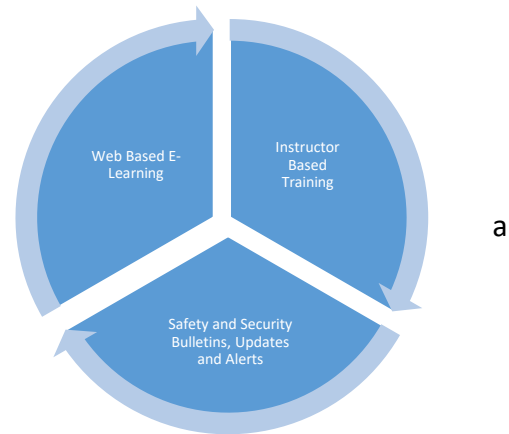
The training includes modules on performance issues, leadership skills, proper disciplinary procedures, accident investigation techniques, handling performance reviews and much more.

Level III training is offered on a regional basis, two to four times per year, and all eligible employees who are candidates for promotion are expected to take advantage of this company-funded training. Eligible employees participate in 8 to 16 hours of training each year through our Level III course offerings. This is instructor-based training, led by internal or external subject matter experts. All participants in Level III training are required to pass an extensive final examination.

### *Continuing Education*

Our trainers are always at work developing compelling content for ongoing training. Whether the topic of the training seminar is one of general interest for officers throughout the region, or site-specific material developed at client's request, our trainers keep the subject matter fresh, relevant, and engaging to the officers.

Beyond the instructor-based training, our trainers regularly issue bulletins, letters, updates, and alerts on different safety training topics, providing a continuing education component to SAFE training.



Our officers understand that the more they know – about the site, the client, Sunstates, and the industry in general – the more valuable they are. Because we specifically recruit and hire individuals, we anticipate will pursue long-term careers in security, we find that our people are typically hungry to assimilate the knowledge and information shared through continuing education.

Many Sunstates employees choose to continue their education even beyond our mandatory requirements. We provide substantial resources and support for officers pursuing higher education and specialized certifications.

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### *Web-Based E-Learning*

Sunstates Security's cutting edge E-Learning platform allows any Sunstates employee with a live internet connection the ability to login to his or her own personal E-learning portal, anytime, anywhere, and access our library of 351 courses designed specifically for security professionals.

Course topics range from basic security officer training, to Department of Homeland Security certificate programs, to leadership & development courses for supervisors and managers. And because the Sunstates Learning Management System (LMS) is secure and customizable, clients can enjoy the peace of mind of knowing that training designed specifically for their facility is assigned only to Sunstates employees who have a need to learn that material.

Sunstates utilizes a Compliance Tracker through a cloud-based integrated payroll, scheduling, and quality assurance platform to ensure employees are compliant with training and corporate policies as well as legal and regulatory requirements. Compliance Tracking Codes are set up within the performance requirements that are tied to employees, jobs, and posts. These Compliance Tracking Codes allow Sunstates to track specific skills, training, and other requirements specific to client sites. The Compliance Tracking Codes can be set up as specific to a single post during a single shift. Warning messages alert management when trying to schedule employees who do not meet the specified compliance requirements.

At Sunstates Security, the E-Learning experience is core to our belief that a continuous and ongoing education program will result in a highly skilled, customer oriented, exceptionally prepared security team. For a video tour of the Sunstates E-Learning program within our customized LMS please visit:

[www.SunstatesSecurity.com](http://www.SunstatesSecurity.com).

### *Conclusion*

Many of our clients tell us that in their experience, most security providers scramble before start-up to recruit applicants, screen them to varying degrees and administer the state-mandated training. Then they cut these people loose on site with little more support than the occasional phone call or inspection.

In contrast, our work is really just beginning once we have qualified, trained officers on your site. Our managers and our quality team step in at this point, evaluating and confirming on a continuing basis whether each person on the team is a good match for his or her assignment, and supplementing training with hands-on observation and direction.

### *Management*

**Service first.** Out of the wealth of information in this section, this is what we want you to take away: service is our first and foremost priority. Our management practices – all the manager visits, the formal

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evaluations and audits, the client meetings – all of that is just means to an end, and that end is putting our clients and their needs first.

Sunstates Security provides an unparalleled level of service driven by stringent internal standards and hands on management practices. Business portfolios of Sunstates managers are purposely limited to ensure that they have the time to be a consistent presence at each client site several times each month. Officers and clients receive direct management support on a regular basis and there are continuous opportunities for reciprocal communication to ensure contract compliance and customer satisfaction.

In this section, we focus on our management checks, examining them from three angles:

- What management checks are in place?
- When are management checks performed?
- Who performs the management checks?

For every management check, there is a corresponding quality assurance balance.

### *What Management Checks Are in Place?*

#### ✓ *Several Management Site Visits Each and Every Month*

Every site served by Sunstates is visited several times per month by a member of our management team, according to a management plan custom-designed for the site. Visiting managers any given month could include:

- The Site Supervisor or Site Manager;
- The Operations Manager;
- The Regional Director or Regional Manager;
- The Sr. Vice President of Operations;
- The Director of Quality Assurance;
- The Corporate Training Manager;
- The Legal & Compliance Team;
- The Chief Operating Officer; and
- The Company President

Who visits the site and how many times varies month to month, but we guarantee that every site without exception will be visited several times per month by managers vested with responsibility and accountability for specific aspects of our process.

The regular physical presence of these individuals on site creates a network of mid-level and high-level managers with live, working knowledge of your site, your challenges, your priorities, and your expectations.

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They each bring a different perspective and unique expertise to the table, with the collective goal of establishing a benchmark at your site for incomparable service.

By subjecting each site to the ongoing involvement and scrutiny of an off-site management team, we maximize our capacity to be pro-active with security solutions and innovations, rather than merely reactive. While our site team is focusing on the demands and details of daily service, our off-site team is continuously monitoring the operation close-up *and* from a bird's eye view, confirming performance as promised while continually re-evaluating and re-assessing our process.

Our proactive monthly visits drive our management and continuous quality improvement system while allowing us to accomplish key objectives.

- **We observe and analyze the security operation from “the inside.”**

Managers at all levels of our organization, from the Site Supervisor to the company President, know what is going on at each and every site on a day-to-day basis. Remarkably, Sunstates President Glenn Burrell is on a first-name basis with most of the clients we serve.

The Site Inspection Log at any of our sites includes a record of visits to the site each month by Sunstates managers. Each name on the Site Inspection Log represents a person who is accountable for and personally committed to the site's security operation. You can count on every individual who signs your Site Inspection Log as a familiar, trusted partner in the truest sense of the word “partner.” Your interests are our priority; your safety is our success; your loyalty is our reward.

Sunstates utilizing a cloud-based integrated payroll, scheduling and quality assurance platform with a customizable smart phone app (eHub) mobile application managers can log in anyplace anywhere to keep their finger on the pulse of our Quality Assurance measures for sites, employees and region inspections. Our Quality Assurance Program allows Sunstates to manage jobs and connect and manage employees, create, and respond to questions, act based on responses and share results. The QA module is built around “Checkpoints”, or question-and-answer lists created to inspect or evaluate job sites and employees to our clients' satisfaction. The use of the app during the QA process provides a digital record of the review showing a time/date/location confirmation and can include digital photos of an employee in uniform or something noteworthy at a site location. Once a Checkpoint is completed, you can review any deficiencies and address them. Deficiencies are created when scores do not meet pre-defined quality standards. Sunstates managers then create reports from Checkpoint information in order to share results or post results so employees and clients are informed.

Our customers have access to a cloud-based client portal that can be accessed to view activity regarding their facilities, officers, and management team. Sunstates can customize the QA's to create track able metrics assuring we are meeting or exceeding our clients' expectations.

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## Mobile App Features



### JOB SUPERVISOR FEATURES

Manage jobs on the go with access to key eHub features on a mobile device:

- View & fill open posts
- View & modify schedules
- View job location & map it
- Perform inspections or surveys on site & add photos & notes
- View inspection or survey results & manage deficiencies
- Clock in to or out of jobs & perform periodic checks
- View hourly benefits
- Verify employee location using geo-location tracking
- Submit & monitor Action Items like customer requests or complaints

Connect with & manage employees easily:

- Call, text or email directly from the application
- Share employee schedules via email or text
- View employee pay stubs & hours/rate info



### EMPLOYEE FEATURES

Give employees the ability to:

- Check their own schedules
- View their own paycheck information
- View hourly benefits
- Clock in to or out of jobs & perform periodic checks
- Access job location information
- Perform inspections & surveys
- View company or job information, including messages, documents, links & events
- Submit Action Items like customer requests or complaints

The free mobile application is compatible with iPhone®, iPad® & Android™ devices.

- **We measure our team's performance, over and over again.**

Every visiting manager inspects the site concierge/security operation, evaluating and documenting findings across more than 20 different metrics, using the electronic QA-1(A) Spot Check form included in the Exhibits. Performance in each area is formally scored, with commentary where appropriate, and as data is entered for each metric, live graphing provides an instant, visual representation of how effectively we are managing performance consistent with regulatory requirements, client specifications and our internal standards. Less than perfect scores result in swift, responsive improvements.

We can also custom-develop performance metrics to meet specific client needs, for use in addition to our internally developed performance measurement system.

EHub Checkpoints or Quality Assurance Audits cover site specific audits, training and safety audits, quality audits, regional office audits, vehicle fleet audits, customer satisfaction reports. All available for mobile devices:

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- Site specific/Customizable QA audits, - topics and questions vary depending upon client Training & Safety QA Audit, 20 questions
- Site Inspection (Spot Check) QA Audit, 10 questions
- Account QA Audit, 21 questions

Others:

- Regional Office QA Audit
- Vehicle Fleet QA Audits
- Customer Satisfaction Report/KPI Review

Customers can be granted access to these reports/QA's with an issued logon/password.

- **We provide on-the-spot training, motivation and mentoring for the site team.**

Our visiting managers are experts at helping our site teams experience the satisfaction and fulfillment that comes from a job well done. They balance critical oversight with positive feedback and even hands-on coaching to help build strengths, skills, and competencies. They actively engage our officers in the process of discovering how we as a team could do things better. Many of our visiting managers have risen through the ranks themselves, and their watchful, perceptive presence reassures officers of their own future potential.

Our management team conducts formal employee performance reviews on an annual basis, providing each employee with positive reinforcement as appropriate and mapping out goals for the future. The performance evaluation and review process are a learning experience for each officer, an opportunity to reassess career objectives, and a source of motivation, as the potential for merit pay increases is tied to performance.

✓ *One formal Quality Assurance Site Assist Visit at a minimum every six (6) months*

At every Sunstates site, the Regional Manager or Director conducts at minimum:

- Quality Assurance Site Assist Visit between January and June
- Quality Assurance Site Assist Visit between July and December

Through these visits, at least every six months, the Regional Manager or Director evaluates and scores the operation across a total of more than 30 different metrics in the following areas.

- Manuals and documentation
- Human resources
- Risk management



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- Professional image
- Continuing education modules
- Training and education records
- Safety compliance
- Customer relations

All site evaluation findings are documented on Customer Quality Assurance Spot Check Form QA-1(A), included in the Exhibits section. As data for each metric is entered, this dynamic electronic form provides live charting and graphing of composite evaluation scores in each overall area.

✓ *One or More Face-to-Face Meetings per month between the Local Regional Manager / Director and the Client*

There is no substitute for personally spending time with our clients on an ongoing basis. Face time creates a comfort level and bond that gives rise to the sense of genuine partnership and unified team spirit we seek. Our Regional Manager or Director comes to client meetings prepared to discuss progress and improvements at the site, with supporting documentation drawn from the monthly Spot Checks or from Site Assist Visits.

If in the course of any of our management visits, concerns were identified requiring our client to take action – for instance, if we have noted that a fire extinguisher needs to be refilled – our Regional Manager or Director checks on the status of that action item during the monthly meeting, and continues to re-visit the concern every month until it is resolved. We conduct these ongoing status checks on open action items because we understand there are many demands on your time and attention.

Your safety, protection and risk management are our full-time concern, and we take every precaution to ensure that we are supporting you in every possible way.

We know our performance is a reflection on you. We are serious about providing you with extraordinary support and resources, along with documentation of service levels and improvements that will validate your choice of Sunstates and provide concrete evidence of the success of the security program under your management.

✓ *One or More Meetings per week between the Site Supervisor (or Site Manager) and the Client*

Our Site Supervisor or Site Manager touches base with the client face-to-face, or if circumstances demand, by phone, at minimum once per week.

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In all actuality, at most sites, there is daily contact between the Site Supervisor or Site Manager and the client. But the “once per week” mandate ensures that even if a client is traveling or otherwise not immediately accessible, there is never any disconnect or weakening of the bond between the client and the site team.

✓ *Daily Activity Reports (DARs) and Incident Based Reports (IBRs)*

Every day, site personnel complete Daily Activity Reports (DARs) and Incident Based Reports (IBRs) if called for. These reports are forwarded daily to the local Region office, enabling our Regional Manager to easily keep tabs on the site between management visits and client meetings. Regional personnel carefully review these reports and follow up with the site team immediately on any action items.

✓ *Other Reports and Documentation*

Earlier in this section, we explained how our visiting managers and auditors use the following reports to measure performance at the site and drive the continuous improvement process.

- QA-1(A)-Customer Quality Assurance Spot Check
- QA-2 Assist Visit & Quality Assurance Training & Safety Audit
- QA-3 Quality Assurance Office Assist
- QA-4 Customer Quality Assurance Review

In addition to the QA reports above and the DARs and IBRs described in the preceding check, site personnel maintain and produce a variety of other reports and documentation, such as:

- Shift pass down logs
- Site inspection logs
- Client-specific reports
- Special reports such as energy management system reports, surveillance or building system reports
- Officer evaluations
- Payroll reports
- Client contact reports

Our managers can rely on the comprehensive documentation maintained for each site to provide an accurate picture of site security activity at any given time.

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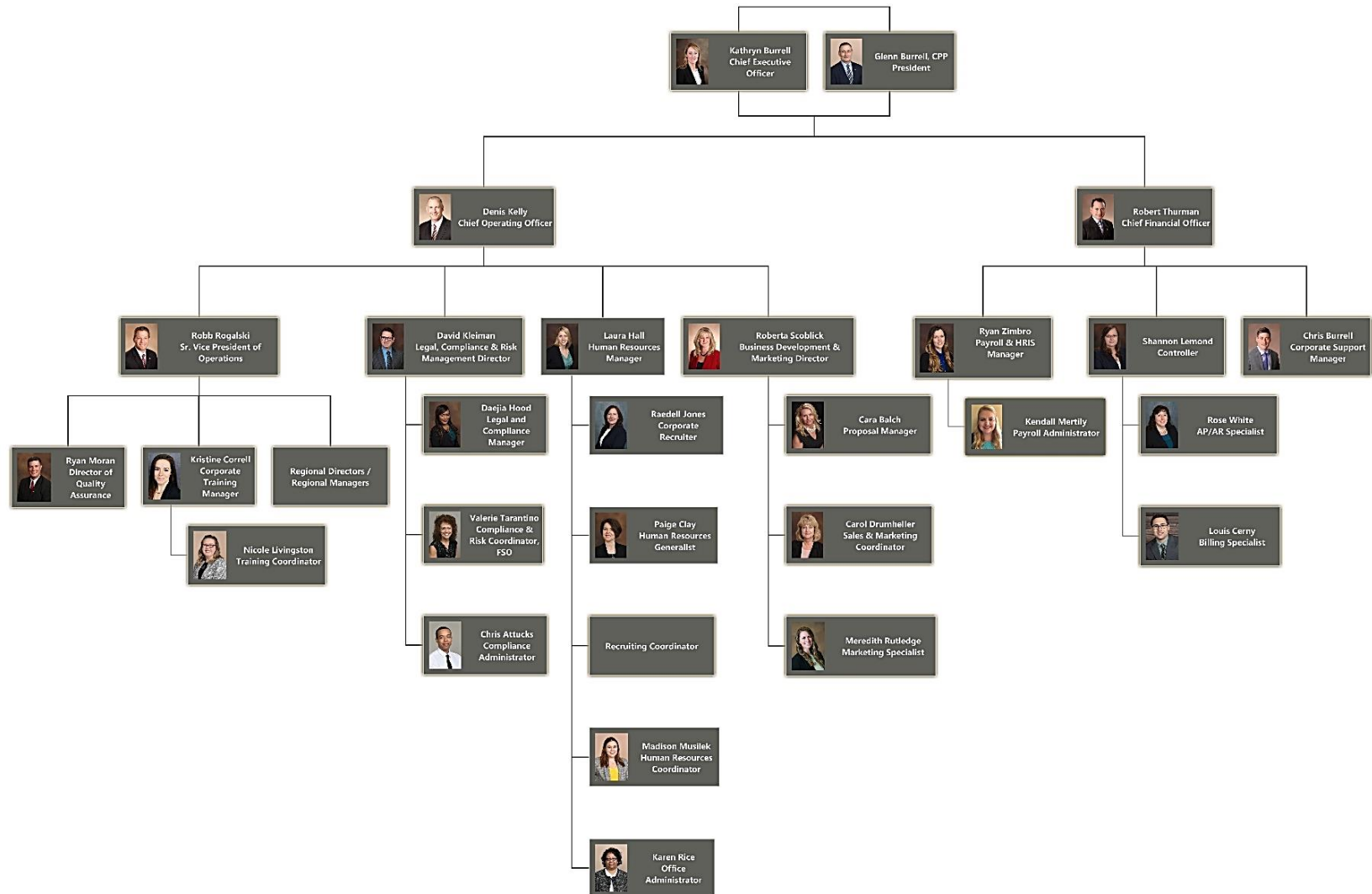
*When Are Management Checks Performed?*

Check	How Often?	Conducted by Whom?
Manager Visit, documented with Customer Quality Assurance Spot Check QA-1(A)	Several times per month	Varying combinations of the following. (Some managers will visit more than once.) <ul style="list-style-type: none"> <li>• Site Supervisor</li> <li>• Account Manager</li> <li>• Regional Director</li> <li>• Regional Manager</li> <li>• Sr. Vice President of Operations</li> <li>• Director of Quality Assurance</li> <li>• Corporate Training Manager</li> <li>• Legal &amp; Compliance Department</li> <li>• Chief Operating Officer</li> <li>• President</li> </ul>
Assist Visit & Quality Training & Safety Audit QA-2	Twice per year Once per year	Conducted by the Region Conducted by Corporate Office
Quality Assurance Office Assist QA-3	1 or more, between January and June, and 1 or more between July and December	Regional Director, Regional Manager and Legal & Compliance Department
Customer Quality Assurance Review-QA-4	1 or more per year	One or more of following: <ul style="list-style-type: none"> <li>• Corporate Training Manager</li> <li>• Director of Quality Assurance</li> <li>• Legal &amp; Compliance Department</li> <li>• Sr. Vice President of Operations</li> <li>• President</li> </ul>
Client Meeting (face to face)	1 or more per month	<ul style="list-style-type: none"> <li>• Account Manager</li> <li>• Regional Director / Manager</li> </ul>
Client Meeting (face to face or by telephone)	1 or more per week	<ul style="list-style-type: none"> <li>• Site Supervisor</li> <li>• Account Manager</li> </ul>
Daily Activity Report	1 per day	Site Personnel
Incident Based Report	As necessary	Site Personnel
Other Reports and Documentation	Varies	Varies

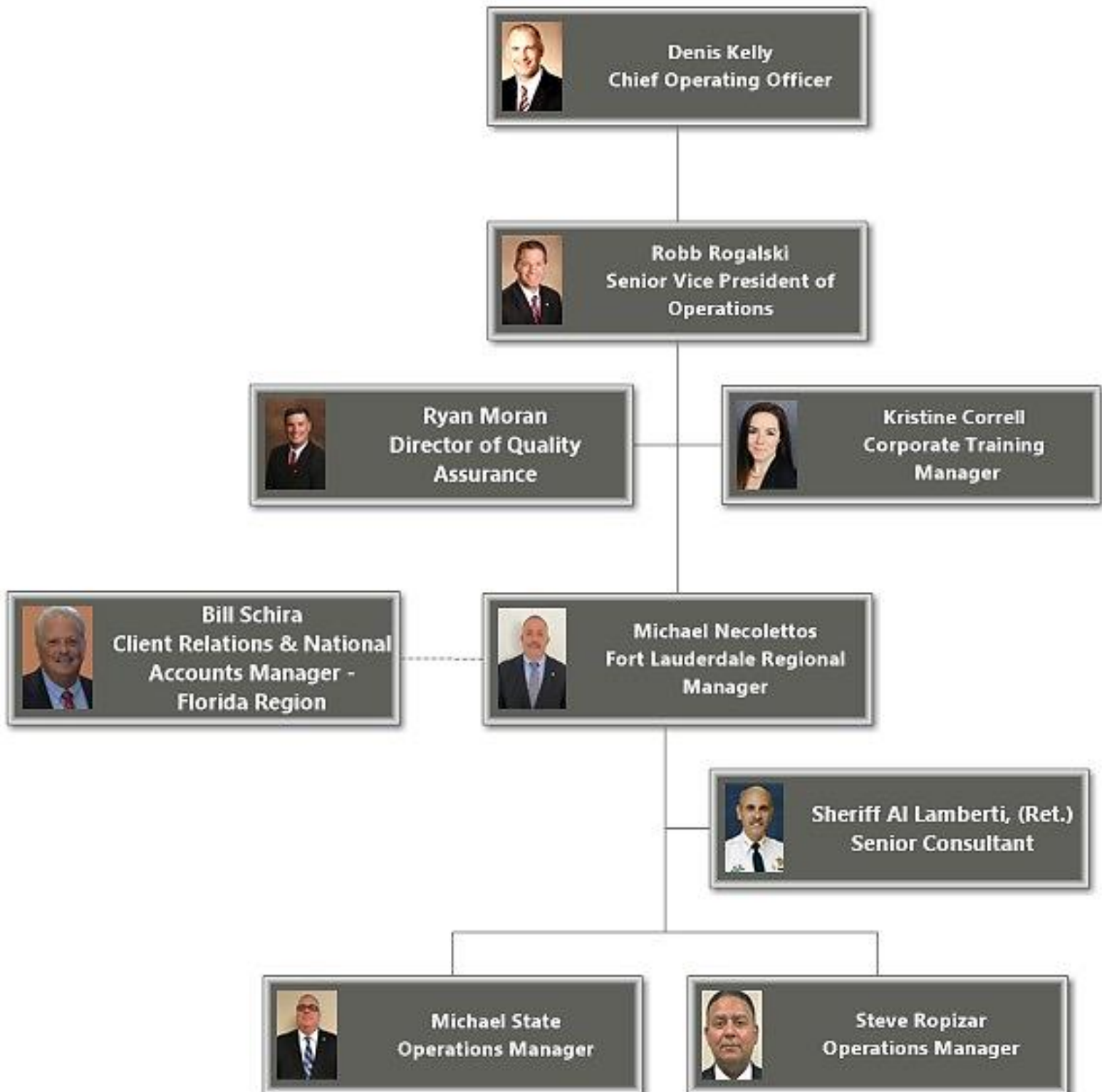
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*Who Performs the Checks?*

The Corporate Support Team and Regional Management biographies were outlined in section in the Executive Summary – I.

*Corporate Support Team*

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*Florida Operations Support Team*

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## *Transition*

Your transition is Sunstates' responsibility. Over the years, we have formulated, tested, and refined our transition strategies to create a turnkey system for effectively meeting the many challenges of new site start-ups. The system is flexible, allowing us to customize the details and specifics in a client-centric approach to each site transition. Although the variables change from client to client and site to site, the following elements of the transition process are constants.

- Meetings with Client
- Launch of Recruitment Activities
- Ordering of Uniforms, Accessories, and Other Equipment
- Development of Standard Operating Procedures
- Development of Training Guidelines

### *Meetings with Client*

Immediately upon award of contract, we coordinate with you to schedule a kick-off meeting involving all the key transition players. At this meeting, we aim to accomplish the following:

- Assign ownership for various transition tasks
- Review the overall objectives for the security program along with the general scope of work and duties to be performed
- Establish a master transition timeline, scheduling key transition milestones to meet the target start-up date
- Schedule site tours and other activities associated with accurate assessment of site needs and requirements
- Collect any existing post orders, standard operating procedures, or client policies for incorporation into the new operating guidelines we will develop for the site
- Schedule weekly meetings to apprise you of our progress

We use an exclusive Transition Start-Up Guideline to ensure a comprehensive approach and thorough follow-through during this crucial developmental period.

### *Launch of Recruitment Activities*

Once we have identified open positions and defined the position qualifications and responsibilities, we move swiftly to begin the recruitment process for any open positions at the site. If you wish to retain incumbent officers, we assist and support those officers as they complete our employment applications and schedule their interviews and background screening process. For positions not filled by incumbent personnel, we recruit internally and externally, using proven recruiting sources and strategies as outlined in the Recruitment and Selection section.



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### *Ordering of Uniforms, Accessories and Other Equipment*

Sunstates has the capability to custom design the look of your officers' uniforms to meet your needs. Early on in the start-up period, we identify your preferred style, color, type and design of uniform, assisting you in the selection of uniform components that appropriately reflect your culture and the image you want your security officers to project. We provide an unlimited selection of uniform variations from professional blazer or police style to casual polos or military look BDUs. Importantly, we then order sufficient quantities of uniforms to outfit your staff and to provide replacements at the first sign of soiling, wear, or tear at no additional cost to you or the officers.

### *Development of Standard Operating Procedures*

Using expertise born over the course of hundreds of transitions in various industries and settings, our Corporate Training Manager and Operations Manager translate our understanding of the program goals and specifics into detailed and illustrated Standard Operating Procedures (SOP) for the site. We re-work and revise the SOPs until they accurately reflect your needs and requirements and effectively integrate your performance standards with ours. We re-visit the SOPs in the course of our management checks, to ensure that they continue to correctly represent our mission at your site, throughout the life of the contract.

### *Development of Training Guidelines*

Following the assessment and the development of SOPs, our Corporate Training Manager establishes a training plan consistent with regulatory requirements, your specifications, and our standards. She goes on to create the training checklist that is a critical tool in the site-specific training program. Upon roll-out of the site training program, he validates and confirms the effectiveness of the SOPs and the training checklist, adjusting, as necessary.

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## Sample Transition Timeline

- Sample timeline below is based on a 30-day start-up period which is fully customizable for various transition periods
- Planning begins the day a transition date is confirmed
- Weekly conference calls throughout the transition assure effective communication and planning
- Detailed transition plan is customized for your site to identify individual management team members assigned specific tasks, deadlines for completion, etc.

	Week 1	Week 2	Week 3	Week 4	Transition Day	Post Start Week 1
Initial base planning meeting and tour of client operations						
Confirm staff levels and schedule						
Introduce Sunstates to existing security and management team						
Development of post orders and standard operating procedures						
Begin recruiting security personnel						
Alert uniform and equipment supplier of impending needs						
<b>Weekly transition meeting or conference call with client</b>						
Begin administrative data collection for input/ hiring						
Pre-employment screening and Orientation Testing						
Order uniforms						
Finalize selection of site manager/ supervisor						
Prepare training schedule						
Preassignment training of hired personnel						
Uniform fitting and issuance						
Finalize data input for employee records and TEAM input						
Provide electronic copy of post orders to client for review						
Schedule/ begin OJT for newly hired officers						
Review master schedule with client						
Complete OJT training for officers and meet with client to confirm						
Finalize/ get approval for master schedule, post orders and standard operating procedures						
Establish schedule for Quality Assurance activities						

Sunstates will provide a seamless transition, managing all aspects of the process and allowing you, the client, to focus solely on your core business. The transition period provides a golden opportunity for us to start off on the right foot with you. We have crafted a process to ease you through the transition process successfully, with no disruption to your primary business operation. Our solution incorporates lessons learned through countless transitions on what to do and what not to do, in order to achieve a seamless, transparent change of service providers.

You can rely on us to pull out every stop to ensure that your transition to our service is a positive experience. A strong start to our partnership is an excellent foundation for building a solid bond we hope to strengthen over time, as your security program thrives under our management and your direction.

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Sunstates Security is fully able to incorporate this project into our current workload. We have a strong presence throughout the State of Florida; therefore, we have a pool of dedicated personnel and management resources available to transition this project. Fully staffed offices, with dedicated regional managers and operations managers, are located in both the Fort Lauderdale and Orlando.

Technological capabilities Overview:

### *Advanced Technology Solutions*

#### ✦ Paperless Assessment and On-Boarding Process

Sunstates utilizes an *Integrated Applicant Tracking Solution (iATS)* to seamlessly post to online job boards, manage candidate information and communications, and allow for applicants to submit applications online. Additionally, this tool is integrated with background and drug screening to ensure accuracy and compliance. Most importantly this paperless process saves management time and reduces the time it takes to select and onboard new employees.



#### ✦ SilverTrac

SilverTrac Software is a Security Guard Reporting tool that allows users to report incidents, respond to tasks, and scan checkpoints to a live issue monitor. While in the field users can take pictures, record audio files, and add notes to generate amazing reports in a quick and easy process. All of this information is available in powerful reports that track data, analyze trends, and give you and your clients the important information you need to improve your operations.

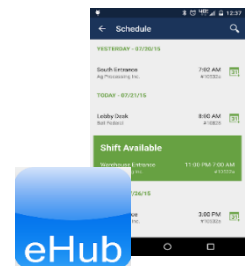


#### ✦ Web Based E-Learning

Sunstates Security's cutting edge E-Learning platform allows any Sunstates employee with a live internet connection the ability to login to his or her own personal E-learning portal, anytime, anywhere, and access an entire library of courses designed specifically for security professionals. The Sunstates library currently consists of over 300 courses.

#### ✦ Cloud Based Reporting: eHub

Sunstates utilizing a cloud-based integrated payroll, scheduling and quality assurance platform with a customizable smart phone app (eHub) mobile application managers can log in anyplace anywhere to keep their finger on the pulse of our Quality Assurance measures for sites, employees and region inspections. More detailed information about the system capabilities and benefits are included in the **Management** section of this proposal.



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## References – IV

### Jewish Federation of South Palm Beach County

Ted Morris | Vice President, Transportation &amp; Security

9901 Donna Klein Blvd., Boca Raton, FL 33428

O: 561-852-3174 | [tedm@bocafed.org](mailto:tedm@bocafed.org)

Client since 2013

1,000+ HPW, Project cost is confidential per client's contractual agreement. This information is available upon request.



Provide armed security services for a 100+ acre guard gated campus. The facility houses multiple support agencies, three (3) schools with over 2,200 students, a Jewish Community Center, a special needs training center, and just over 400 individual apartments, plus coverage for many special events.

### Charlotte Mecklenburg Government Center

Rich Williams | Property Manager

600 E. Fourth Street, Charlotte, NC 28202

O: 704-432-4350 | [rich.williams@ci.charlotte.nc.us](mailto:rich.williams@ci.charlotte.nc.us)

Client since 2013

700+ HPW, Project cost is confidential per client's contractual agreement.

This information is available upon request.



Provide 728+ hours per week of armed and unarmed security guard services to government agency for several city and county facilities to include the Mecklenburg County Courthouse. Services include routine foot, vehicle, golf cart, and bike patrol during normal operating hours of the facilities; responding to calls for service based on incidents that occur or other requests; providing CPR, cardiac defibrillation, and other emergency medical services; providing reports of incidents and other statistical information; and performing other duties as requested by the county project manager.

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### Public Works Commission of the City of Fayetteville

Steve West | Facilities Manager

955 Old Wilmington Road, Fayetteville, NC 28301

O: 910-223-4900 | [steve.west@faypwc.com](mailto:steve.west@faypwc.com)

Client since 2011

370+ HPW, Project cost is confidential per client's contractual agreement. This information is available upon request.



Provide security service to government agency for Operations Complex, Operations Center, Customer Service Center and Water Generation Plant.

### State of Delaware

Marcene Gory | 4 – 12 Section Manager

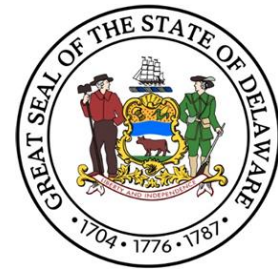
Division of Corporations

401 Federal Street, Dover, DE 19901

O: 302-857-3461 | [marcene.gory@delaware.gov](mailto:marcene.gory@delaware.gov)

Client since 2013

2,100+ HPW, Project cost is confidential per client's contractual agreement. This information is available upon request.



Provide security services to government agency for 44 locations statewide. The sites consist of libraries, Department of Labor, Child Support and Family Visitation Centers, a data center, rest stop, courthouses, community centers, Department of Natural Resources and Environmental Control. The services that are provided are access control, badging, reception services and patrols.

### City of Savannah

Bryan Hollis | Risk Management Director

2 E Bay St., Savannah, GA 31401-1225

912- 651-6404 | [bhollis@savannahga.gov](mailto:bhollis@savannahga.gov)

1,300+ HPW, Project cost is confidential per client's contractual language. This information is available upon request.



Provide security services to government agency for the city government buildings, museums, industrial, water supply plant and critical work force shelter.

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## Minority/Women (M/WBE) Participation – V

Sunstates Security is a certified Women's Business Enterprise (Woman Owned Business). A partnership with Sunstates may help your organization meet its goal of integrating diverse businesses into your overall strategic sourcing processes.

Certification is located in Experience and Qualifications section – II.

## Subcontractors – VI

Sunstates Security will provide all the required services for this project. We will not be using any subcontractors.

## Exhibits – VII

Exhibit 1 – Cost Proposal

Exhibit 2 – Sample Certificate of Liability Insurance

Exhibit 3 – W-9

Exhibit 4 – Active Status from Division of Corporations

Exhibit 5 – Quality Assurance Spot Check Form (QA-1)

Exhibit 6 – Assist Visit & Quality Assurance Training and Safety Audit (QA-2)

Exhibit 7 – Quality Assurance Office Assist (QA-3)

Exhibit 8 – Customer Quality Assurance Review (QA-4)

Exhibit 9 – Silvertrac Real Time Reporting



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## Exhibit 1 – Cost Proposal

**Proposer Name:** Sunstates Security, LLC

Proposer agrees to supply the products and services at the prices bid below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: 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.

Cost per hour to provide a roving Security officer in accordance with the Scope of Services Section of this RFP.

Level A - Base Level	\$ 19.48	per hour X 1 hour = \$ 19.48
Level B- Mid Level	\$ 21.30	per hour X 1 hour = \$ 21.30
Level C – High Level	\$ 22.65	per hour X 1 hour = \$ 22.65

Cost per hour to provide a vehicle (golf cart) for the roving Security Officer in accordance with the Scope of Services Section of this RFP.

Vehicle (Golf Cart) \$ .64 cents per hour

**Fiveash Regional Water Treatment Compound Hours: 24/day X 365 days = 8,760 hours per year**

Total Cost per year: Level C Roving/hr. \$ 22.65 & Vehicle/hr. \$ .64 X 8,760 = **\$ 204,020.40**

If the City wished to have a non-roving Security Officer at one of the specified facilities or comparable City facility, give the cost per hour for a schedule similar to that specified in the Scope of Services of this RFP and in accordance with the Scope of Services Section of this RFP.

Level A - Base Level	\$ 19.48	per hour X 1 hour = \$ 19.48
Level B- Mid Level	\$ 21.30	per hour X 1 hour = \$ 21.30
Level C – High Level	\$ 22.65	per hour X 1 hour = \$ 22.65

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Total Cost per year: Level B Non-Roving/hr. \$ 21.30 X 4160 = \$ **88,608**

**City Hall:** 2080 hours per year (1 guard)

Total Cost per year: Level C Non-Roving/hr. \$ 22.65 X 2080 = \$ **47,112**

**GRAND TOTAL (3 Locations) \$ 339,740 / ANNUALLY**

If the City wished to have a temporary or emergency non roving Security Officer at one of the specified facilities or comparable City facility give the cost per hour for a reduced schedule such as less than 8 hours per shift and less than 40 hours per week and in accordance with the Scope of Services Section of this RFP.

Level A - Base Level	\$ 19.48	per hour X 1 hour = \$ 19.48
Level B- Mid Level	\$ 21.30	per hour X 1 hour = \$ 21.30
Level C – High Level	\$ 22.65	per hour X 1 hour = \$ 22.65

Proposers note: The cost per hour shall be for specified shift time on the site or security route. The City will not pay for any travel or down time for officers or vehicles.

For evaluation purposes, each level of potential service will be multiplied by one and added to the total annual cost for all services.

**Submitted by:**

Denis J. Kelly

Name (printed)

Signature

10/28/2020

COO

Date

Title

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## Exhibit 2 – Sample Certificate of Liability Insurance

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 9/21/2020															
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>																			
<b>PRODUCER</b> Marsh & McLennan Agency LLC 2301 Sugar Bush Road Suite 600 Raleigh NC 27612			<b>CONTACT</b> NAME: Kinsey Davis PHONE (A/C, No, Ext): 919-532-3636 FAX (A/C, No): E-MAIL: Kinsey.Davis@MarshMMA.com ADDRESS: Kinsey.Davis@MarshMMA.com																
<b>INSURED</b> Sunstates Security, LLC, and, Sunstates Security, Inc. 801 Corporate Center Dr, #300 Raleigh NC 27607			<b>INSURER(S) AFFORDING COVERAGE</b> <table border="1"> <thead> <tr> <th>INSURER</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Clear Blue Insurance Company</td> <td>28860</td> </tr> <tr> <td>INSURER B: Hartford Fire Insurance Company</td> <td>19682</td> </tr> <tr> <td>INSURER C: Hartford Underwriters Insurance Company</td> <td>30104</td> </tr> <tr> <td>INSURER D: Ategrity Specialty Insurance Company</td> <td>16427</td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>			INSURER	NAIC #	INSURER A: Clear Blue Insurance Company	28860	INSURER B: Hartford Fire Insurance Company	19682	INSURER C: Hartford Underwriters Insurance Company	30104	INSURER D: Ategrity Specialty Insurance Company	16427	INSURER E:		INSURER F:	
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INSURER E:																			
INSURER F:																			
<b>COVERAGES</b> <b>CERTIFICATE NUMBER: 480562246</b> <b>REVISION NUMBER:</b>																			
<p>THIS IS TO CERTIFY THAT 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. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>																			
INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD VVVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS													
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input checked="" type="checkbox"/> OTHER: Prof. Liability		WCSECG000021501	1/1/2020	1/1/2021	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 5,000,000 PRODUCTS - COM/OP AGG \$ 5,000,000 \$													
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY		22CSES70501	1/1/2020	1/1/2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$													
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$		WCSECEL000021601	1/1/2020	1/1/2021	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$													
C	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/ MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> N <input type="checkbox"/> A	22WNS70500	1/1/2020	1/1/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000													
D	Excess		01BXP000013780	1/1/2020	1/1/2021	Excess of \$5,000,000 5,000,000													
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)																			
<b>CERTIFICATE HOLDER</b> Sunstates Security, LLC				<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Kinsey Davis</i>															

ACORD 25 (2016/03)

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## Exhibit 3 – W-9

W-9 Form (Rev. October 2018) Department of the Treasury Internal Revenue Service		Request for Taxpayer Identification Number and Certification Go to <a href="http://www.irs.gov/FormW9">www.irs.gov/FormW9</a> for instructions and the latest information.		Give Form to the requester. Do not send to the IRS.	
<b>1</b> Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Sunstates Security, LLC</b>					
<b>2</b> Business name/disregarded entity name, if different from above					
<b>3</b> Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) <b>P</b> <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions)					
<b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) Exemption from FATCA reporting code (if any) <small>(Applies to accounts maintained outside the U.S.)</small>					
<b>5</b> Address (number, street, and apt. or suite no.) See instructions. <b>801 Corporate Center Drive, Suite 300</b> <b>6</b> City, state, and ZIP code <b>Raleigh, N.C. 27607</b>				<b>7</b> List account number(s) here (optional)	
<b>Part I Taxpayer Identification Number (TIN)</b> 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. <b>Note:</b> If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.					
<b>Part II Certification</b> 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.				<b>Social security number</b> or <b>Employer identification number</b> 5 6 - 2 0 5 3 9 6 8	
<b>Certification instructions.</b> 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.					
<b>Sign Here</b> Signature of U.S. person <b>Carol B. Drumbeller</b> Date <b>01/04/2020</b>					
<b>General Instructions</b> Section references are to the Internal Revenue Code unless otherwise noted. <b>Future developments.</b> For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to <a href="http://www.irs.gov/FormW9">www.irs.gov/FormW9</a> . <b>Purpose of Form</b> An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following: • Form 1099-DIV (dividends, including those from stocks or mutual funds) • Form 1099-MISC (various types of income, prizes, awards, or gross proceeds) • Form 1099-B (stock or mutual fund sales and certain other transactions by brokers) • Form 1099-S (proceeds from real estate transactions) • Form 1099-K (merchant card and third party network transactions) • Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition) • Form 1099-C (canceled debt) • Form 1099-A (acquisition or abandonment of secured property) Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN. If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.					

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**Exhibit 4 – Active Status from Division of Corporations**

# *State of Florida Department of State*

I certify from the records of this office that SUNSTATES SECURITY, LLC is a North Carolina limited liability company authorized to transact business in the State of Florida, qualified on June 24, 2002.

The document number of this limited liability company is M02000001668.

I further certify that said limited liability company has paid all fees due this office through December 31, 2020, that its most recent annual report was filed on March 18, 2020, and that its status is active.

I further certify that said limited liability company has not filed a Certificate of Withdrawal.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Twenty-second day of October,  
2020*



*Randy Be*  
Secretary of State

Tracking Number: 4584778568CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

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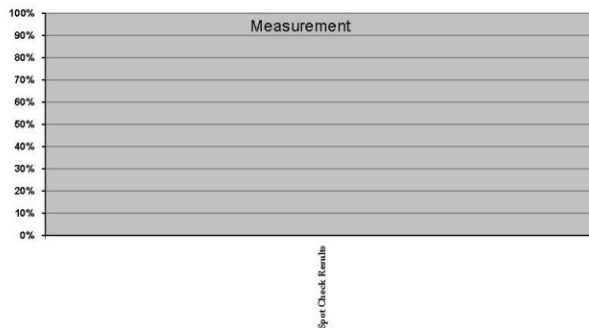


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## Exhibit 5 – Quality Assurance Spot Check Form (QA-1)

SUNSTATES SECURITY QUALITY ASSURANCE SPOT CHECK "PROVIDE QUALITY AND PROFITS WILL FOLLOW"			
Date & Time of Visit: _____		Branch Manager's Name: _____	
Visitor's Name: _____		Account Name & Number: _____	
		Officers Present: _____	
		Supervisors Present: _____	
	Possible Points	Actual Points	Comments
<b>Individual Traits</b>			
Time sheets current (do they mirror schedule)?	1	0	
Current & following weekly schedule posted?	1	0	
Accident reporting procedures accessible?	1	0	
Medical reporting procedures accessible?	1	0	
Emergency contact numbers accessible?	1	0	
Current edition of Handbook accessible?	1	0	
SOP accessible?	1	0	
Safety manual accessible?	1	0	
Have on-shift officers reviewed passdown log?	1	0	
Is account inspection target being met (Log)?	1	0	
Has fleet vehicle been inspected before driven?	1	0	
Are personnel / training files secure?	1	0	
Do on-duty personnel have a valid state regulatory credential on their person?	1	0	
Did on-duty personnel answer SOP questions correctly?	1	0	
Is current "Lancer" on display?	1	0	
Are DAR's & IBR's current and being archived?	1	0	
Is work area clean, neat & orderly?	1	0	
Is duty equipment under control (keys secured on belt keeper or locked away, radio, cell phone, pepper spray, properly holstered, etc.)?	1	0	
Do on-duty personnel present a professional image?	1	0	
Do on-duty personnel have a field note pad & pen on their person?	1	0	
<b>POINT TOTAL:</b>	<b>20</b>	<b>0</b>	<b>0%</b>
		<b>Check</b>	
Spot Check Results	20	0.0	0.0%
<b>POINT TOTAL</b>	<b>20</b>	<b>0</b>	<b>0.0%</b>



Updated: 05/2010

QA-1(A)

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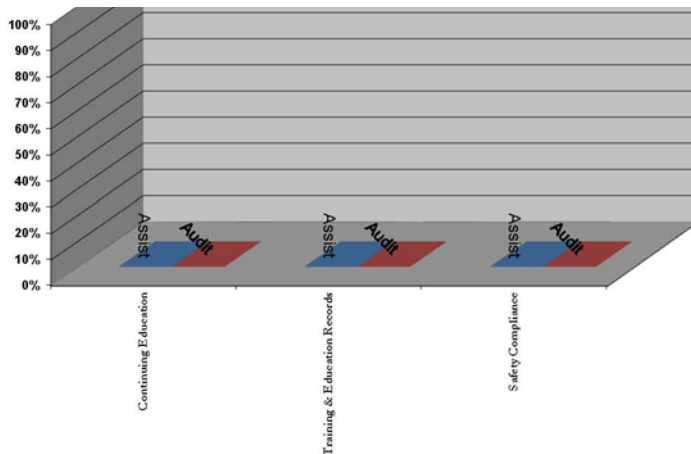


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## Exhibit 6 – Assist Visit & Quality Assurance Training and Safety Audit (QA-2)

SUNSTATES SECURITY						
ASSIST VISIT & QUALITY ASSURANCE TRAINING & SAFETY AUDIT						
*PROVIDE QUALITY AND PROFITS WILL FOLLOW*						
Date of Bi-Annual Visit: _____			Branch Manager's Name: _____			
Visitor's Name: _____			Account Name and Number: _____			
Date of Audit: _____			Officer(s) Present: _____			
Auditor's Name: _____			Possible Points	Actual Points	Audit	Supervisor(s) Present: _____
<b>Continuing Education</b>						<b>Comments</b>
Are LMS courses available?			1			
Are hardcopy courses available?			1			
Have all officers certified in CPR?			1			
Have drivers completed DDC?			1			
Have employees completed state regulatory training or Sunstates 12 modules?			1			
<b>POINT TOTAL:</b>			<b>5</b>	<b>0</b>	<b>0</b>	<b>Continuing Education Modules 0%</b>
<b>Training &amp; Education Records</b>						<b>Comments</b>
T&E Record on file for each employee?			1			
T&E Records securely filed?			1			
Is TSC training up to date?			1			
<b>POINT TOTAL:</b>			<b>3</b>	<b>0</b>	<b>0</b>	<b>Employee Training &amp; Education Records 0%</b>
<b>Safety Compliance</b>						<b>Comments</b>
Is the Safety Manual accessible?			1			
Are Accident/Injury Reporting Forms accessible?			1			
Are safety posters applicable and current?			1			
Is list of nearby medical facilities available?			1			
Is the Accident Reporting poster visible?			1			
Is Fire Extinguisher Accessible & Charged?			1			
Have all employees completed Sunstates Safety Orientation (LMS)?			1			
Safety equipment (PPE) issued/stowed properly?			1			
Are fleet vehicle inspections being done (PM's)?			1			
Traffic vests being worn around moving vehicles?			1			
First Aid Kit available and stocked?			1			
Bomb threat form posted near phone?			1			
<b>POINT TOTAL:</b>			<b>12</b>	<b>0</b>	<b>0</b>	<b>Safety Manual Overview 0%</b>
						<b>Assist</b> <b>Audit</b>
Continuing Education			5	0.0	0.0	0.0% 0.0%
Training & Education Records			3	0.0	0.0	0.0% 0.0%
Safety Compliance			12	0.0	0.0	0.0% 0.0%
<b>POINT TOTAL</b>			<b>20</b>	<b>0</b>	<b>0</b>	<b>0.0% 0.0%</b>



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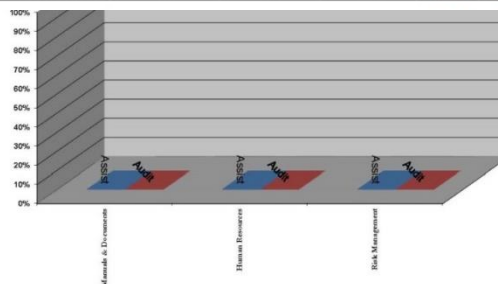
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## Exhibit 7 – Quality Assurance Office Assist (QA-3)

SUNSTATES SECURITY					
QUALITY ASSURANCE OFFICE ASSIST					
*PROVIDE QUALITY AND PROFITS WILL FOLLOW*					
Date of Bi-Annual Visit: _____		Branch Manager's Name (Print): _____			
Visitor's Name: _____		Office Name: _____			
		Date of Audit: _____			
	Possible Points	Actual Points	Audit		
<b>Manuals &amp; Documents</b>				<b>Comments</b>	
Is the handbook available?	1	0	0		
Is WinTeam License Expiration Report current?	1	0	0		
Document destruction available?	1	0	0		
<b>POINT TOTAL:</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>Manuals &amp; Documents</b>	<b>0%</b>
<b>Human Resources</b>				<b>Comments</b>	
Is there a personnel file for each employee?	1	0	0		
Are personnel files properly secured?	1	0	0		
Are I-9's completed correctly, on the first day of work, and filed as required by law?	1	0	0		
Is E-Verify completed on all applicants?	1	0	0		
Is the E-Verify case verification number annotated on I-9 or has the E-Verify confirmation page been attached to I-9?	1	0	0		
Are personnel, I-9, & medical records filed separately?	1	0	0		
Are active I-9 and terminated I-9 documents separated?	1	0	0		
Are personnel files being kept for seven (7) years? (2012 new hires forward)	1	0	0		
Is a Copy of Registration Application & Current Hard Card in each Personnel File?	1	0	0		
Is the Current "Lancer" on display?	1	0	0		
Is employee hiring completed per checklist?	1	0	0		
Has orientation and training been completed for each employee?	1	0	0		
Are applications for non-selected candidates being kept separately, on file for seven (7) years? (2012 non-selected candidates forward)	1	0	0		
Are performance Appraisals being done annually on all personnel?	1	0	0		
Are Labor Posters Current & Displayed?	1	0	0		
Is uniform room neat & organized?	1	0	0		
Is Office Equipment in Working Condition?	1	0	0		
Are Branch Office, Security Agency and QA Licenses Current & Displayed?	1	0	0		
Are privilege/tax licenses current and displayed?	1	0	0		
<b>POINT TOTAL:</b>	<b>19</b>	<b>0</b>	<b>0</b>	<b>Human Resources</b>	<b>0%</b>
<b>Risk Management</b>				<b>Comments</b>	
Is Bomb Threat Form Next to the Phone?	1	0	0		
Emergency Evacuation/Response Plan in Place?	1	0	0		
OC Spray/Handcuffs Stored Securely?	1	0	0		
Lethal/Non-lethal weapons stored securely?	1	0	0		
Branch Office Alarmed?	1	0	0		
Key Control Process Adequate?	1	0	0		
Is confidential information accessible to outside parties and not visible in work areas? (loose documents or on computer screens)	1	0	0		
Computer Access Controlled / password protected, laptops taken home?	1	0	0		
<b>POINT TOTAL:</b>	<b>8</b>	<b>0</b>	<b>0</b>	<b>Risk Management</b>	<b>0%</b>
<b>Manuals &amp; Documents</b>	<b>3</b>	<b>0.0</b>	<b>0.0</b>	<b>Assist</b>	<b>0.0%</b>
<b>Human Resources</b>	<b>19</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Risk Management</b>	<b>8</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0%</b>	<b>0.0%</b>
<b>POINT TOTAL</b>	<b>30</b>	<b>0</b>	<b>0</b>	<b>0.0%</b>	<b>0.0%</b>



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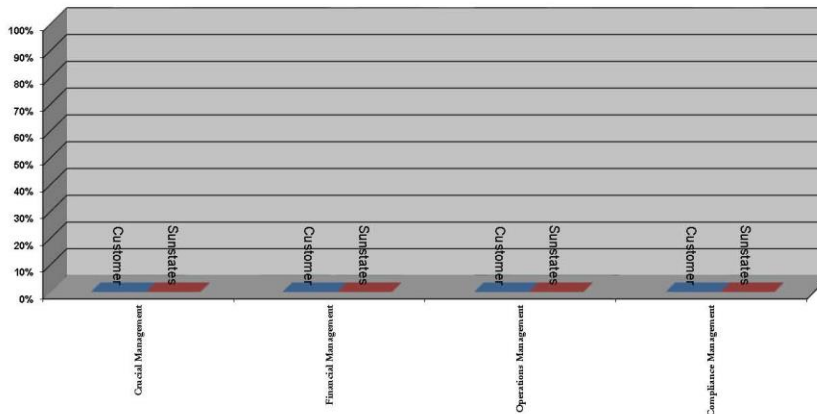
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## Exhibit 8 - Customer Quality Assurance Review (QA-4)

SUNSTATES SECURITY CUSTOMER QUALITY ASSURANCE REVIEW "We are committed to exceeding every customer's expectations"				
Period covered: _____ Thru _____		Customer's Name: _____		
Date of Review: _____		Account Name and Number: _____		
		Manager's Name: _____		
		Supervisor's Name: _____		
Grading Scale: A= 90-100; B= 80-89; C= 70-79; D= 60-69; F= <60	Possible Points	Customer Assessment	Sunstates Assessment	
<b>Crucial Management</b>				
Qualified personnel provided?				Comments
Personnel are well trained?				
Not culpable for any violations or serious breaches of security?				
POINT TOTAL:	0	0	0	Crucial Management #DIV/0!
<b>Financial Management</b>				
Invoices are accurate?				Comments
Invoices are delivered within 14 days, upon close of billing period?				
POINT TOTAL:	0	0	0	Financial Management #DIV/0!
<b>Operations Management</b>				
100% staffing of regularly scheduled coverage?				Comments
Staffing of extraordinary coverage with 24 hour advance notice?				
Minimizing overtime when feasible?				
Compliance with facility patrols on a consistent basis?				
Compliance with alarm response times on a consistent basis?				
POINT TOTAL:	0	0	0	Operations Management #DIV/0!
<b>Compliance Management</b>				
Compliance with officer training and education requirements?				Comments
Compliance with uniforms, equipment, and appearance standards?				
Compliance with standards of conduct?				
Manage operations efficiently?				
POINT TOTAL:	0	0	0	Compliance Management #DIV/0!
				Customer Sunstates
Crucial Management	0	0.0	0.0	#DIV/0! #DN/0!
Financial Management	0	0.0	0.0	#DIV/0! #DN/0!
Operations Management	0	0.0	0.0	#DIV/0! #DN/0!
Compliance Management	0	0.0	0.0	#DIV/0! #DN/0!
POINT TOTAL	0	0	0	#DIV/0! #DN/0!



Updated: 06/2011

QA-4

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## Exhibit 9 – Silvertrac Real Time Reporting



## Commercial Reports

This packet contains:

Brief Feature Overview  
Daily Activity Report (With Photos)  
Daily Activity Report (Compact)  
Incident Report  
Checkpoint Timeline Report  
Issue Summary Report

Contact Us

[www.sunstatessecurity.com](http://www.sunstatessecurity.com)  
(866) 710-2019



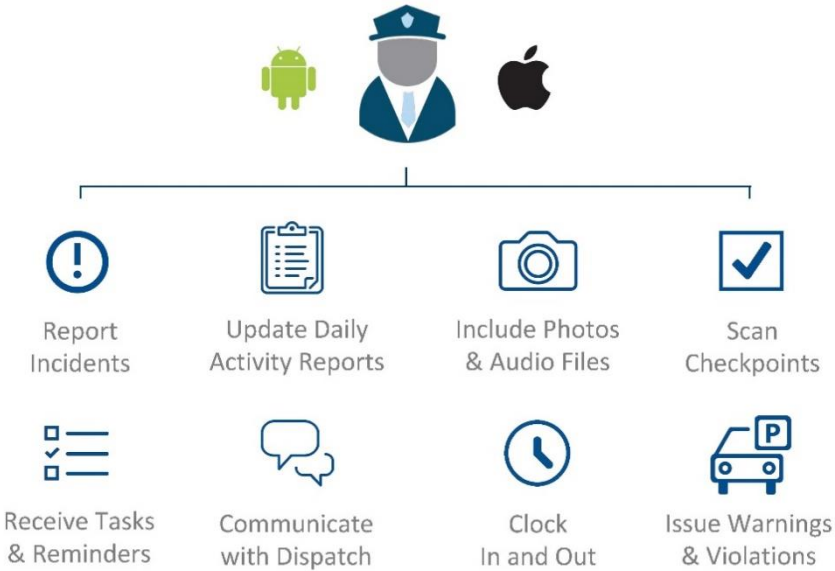
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# Feature Overview

While using any Android or Apple device,  
Officers in the field can:



All of this information is GPS tracked and  
available in real time in the Issue Monitor



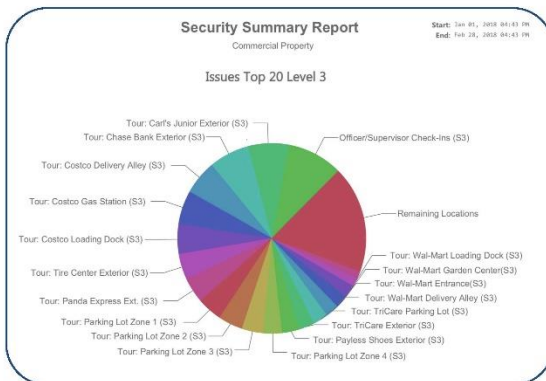


## Our Reporting Process

### How We Report

We use smartphones and tablets with quick and simple drop down reporting menus to streamline the reporting, maximize on site visibility, and reduce your risk and liability.

Instead of traditional hand written DARs our officers are provided varied reporting options that enable them to report easily throughout their shift.



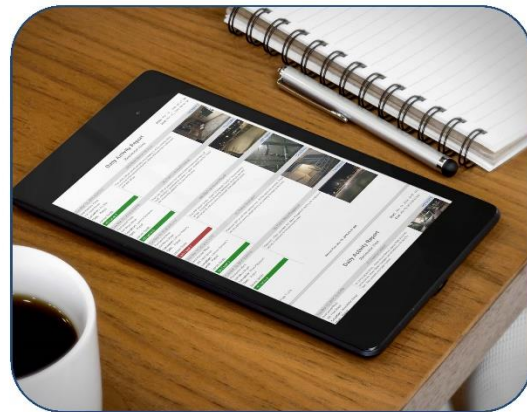
### Customized For You

Our daily and monthly reports can be *completely* customized and worded for your industry and specific property.

All issues are prioritized based on the scope of service at each property and according to your needs.

### Real-Time Incident Notifications

At your choosing any issues or incidents reported can trigger a notification to the necessary parties (i.e. managers, maintenance supervisors or teams, and issue specific vendors).



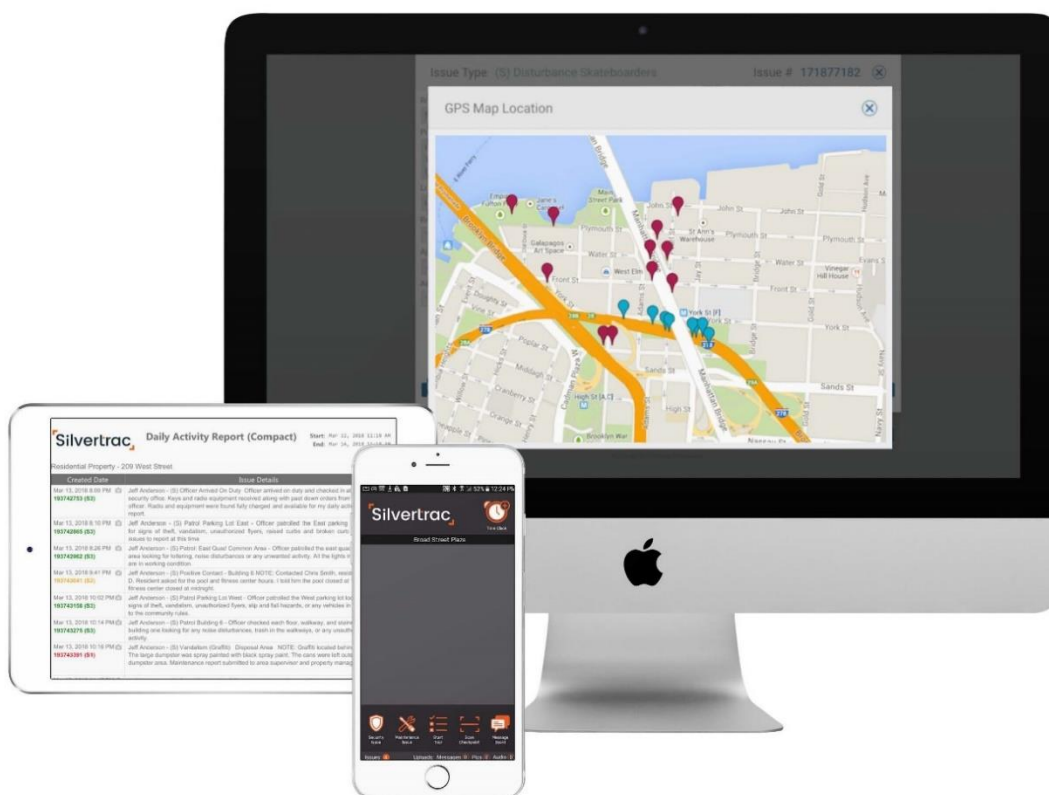




# Guard Tour Checkpoints

## When a checkpoint is scanned 4 things happen

- 1) Instructions are shown to the officer specific to that location
- 2) A pre-written note in risk and liability terms is entered into all reports including the Daily Activity Report (DAR).
- 3) A GPS pinpoint is taken to track the officers location at the time of the scan
- 4) The officer is required to include a photo with the checkpoint to verify their location (*optional*)



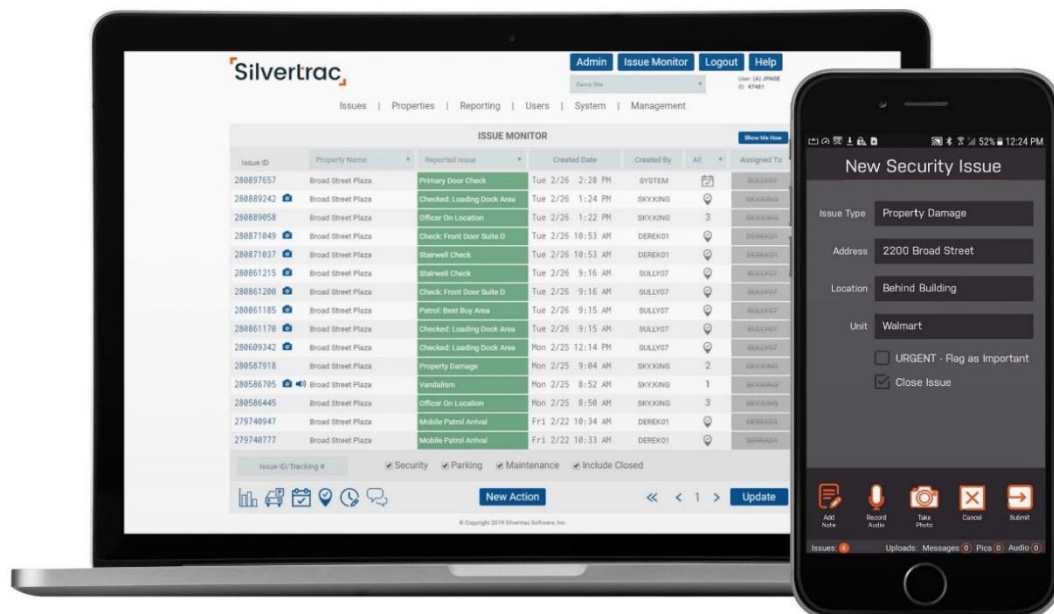




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## Your Live Dashboard

First off, the issue monitor is the hub of all the activity reported through our software. Everything that is reported including incidents, checkpoints, tasks, and dispatched issues will all be tracked right here in the issue monitor.



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## Daily Activity Report

Silvertrac Software

Start: Mar 13, 2018 08:47 AM

End: Mar 15, 2018 08:47 AM

Tue Mar 13, 2018 12:08 PM	(S) Officer Arrived On Duty	193742753
Commercial Property 5412 Beach Boulevard <b>Location:</b> On Site <b>Unit:</b> Patrol  Makena Anderson (S) Level 3	Reported: Officer arrived on duty and checked in at the property security office. Keys and radio equipment received along with past down orders from past shift officer. Radio and equipment were found fully charged and available for my daily activity shift report.	
Tue Mar 13, 2018 12:10 PM	(S) Patrol Parking Lot East	193742865
Commercial Property 5412 Beach Boulevard <b>Location:</b> East Parking Lot <b>Unit:</b> Patrol  Makena Anderson (S) Level 3	Reported: Officer patrolled the East parking lot looking for signs of theft, vandalism, unauthorized vendor flyers, raised curbs and broken curb stops in the customer parking area.	
Tue Mar 13, 2018 12:11 PM	(M) Slip/Trip Hazard Report	193742962
Commercial Property 5412 Beach Boulevard <b>Location:</b> Parking Garage <b>Unit:</b> Patrol  Makena Anderson (M) Level 1	12:40 PM Makena Anderson - Water 5 ft in length found in Center of parking garage. Contacted maintenance team Frank Brown for assistance. Area was secured and coned off for safety and liability. See Attached Photo.	
Tue Mar 13, 2018 12:11 PM	(S) Patrol Parking Lot South	193743041
Commercial Property 5412 Beach Boulevard <b>Location:</b> South Parking Lot <b>Unit:</b> Patrol  Makena Anderson (S) Level 3	Reported: Officer patrolled the South parking lot looking for signs of theft, vandalism, unauthorized vendor flyers, raised curbs and broken curb stops in the customer parking area.	
Tue Mar 13, 2018 12:13 PM	(S) Patrol Parking Lot West	193743158
Commercial Property 5412 Beach Boulevard <b>Location:</b> West Parking Lot <b>Unit:</b> Patrol  Makena Anderson (S) Level 3	Reported: Officer patrolled the West parking lot looking for signs of theft, vandalism, unauthorized vendor flyers, raised curbs and broken curb stops in the customer parking area.	

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## Daily Activity Report

Silvertrac Software

Start: Mar 13, 2018 08:47 AM

End: Mar 15, 2018 08:47 AM

<p>Tue Mar 13, 2018 12:14 PM</p> <p>Commercial Property 5412 Beach Boulevard <b>Location:</b> Loading Dock <b>Unit:</b> Patrol</p> <p>Makena Anderson</p> <p>(S) Level 3</p>	<p>(S) Patrol Loading Dock Area</p> <p>Reported: Officer patrolled the loading dock and checked the commercial vehicles parked at the ramp location. No safety or storage items found at the loading dock area. No vehicles obstructing truck access, or unauthorized trespassing.</p>	<p>193743275</p> 
<p>Tue Mar 13, 2018 12:15 PM</p> <p>Commercial Property 5412 Beach Boulevard <b>Location:</b> Disposal Area <b>Unit:</b> Patrol</p> <p>Makena Anderson</p> <p>(S) Level 3</p>	<p>(S) Patrol Disposal Area</p> <p>Reported: Checked disposal areas and loading dock area for any signs of illegal dumping or overflow concerns. Illegal dumping or overflow concerns will be reported to security supervisor immediately.</p>	<p>193743391</p> 
<p>Tue Mar 13, 2018 12:17 PM</p> <p>Commercial Property 5412 Beach Boulevard <b>Location:</b> Perimeter <b>Unit:</b> Patrol</p> <p>Makena Anderson</p> <p>(S) Level 2</p>	<p>(S) Property Damage Report</p> <p>1:47 PM Makena Anderson - Southern counties driver MH - 52 Salvador Santos License Plate 9F09542. Large Ford Semi Truck ( White ) trailer caused property damage to median and landscape. Located at main entrance off of Carson St. Contacted property maintenance team for clean up and evaluation of damage. Property manager notified at 1:50 PM.</p>	<p>193743569</p> 
<p>Tue Mar 13, 2018 12:17 PM</p> <p>Commercial Property 5412 Beach Boulevard <b>Location:</b> Five Below <b>Unit:</b> Patrol</p> <p>Makena Anderson</p> <p>(S) Level 3</p>	<p>(S) Patrol Merchant Store</p> <p>Reported: Officer conducted a walk through the front area of the tenant spaces and merchant stores. No obstructions or persons loitering during the inspection tour. No visible signs of property damage or vandalism.</p>	<p>193743644</p> 
<p>Tue Mar 13, 2018 12:19 PM</p> <p>Commercial Property 5412 Beach Boulevard <b>Location:</b> On Site <b>Unit:</b> Patrol</p> <p>Makena Anderson</p> <p>(S) Level 2</p>	<p>(S) Lighting Inspection</p> <p>Reported: Officer conducted a lighting inspection at the storefronts and the parking lot area to make sure lighting is in good condition and working properly. No visible signs of light damage or vandalism during this inspection.</p>	<p>193743802</p> 



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**Daily Activity Report (Compact)**

Silvertrac Software

Start: Mar 12, 2018 11:18 AM

End: Mar 14, 2018 11:18 AM

Commercial Property - 5412 West Boulevard

Created Date	Issue Details
Mar 13, 2018 12:08 PM <b>193742753 (S3)</b>	Jeff Anderson - (S) Officer Arrived On Duty Officer arrived on duty and checked in at the property security office. Keys and radio equipment received along with past down orders from past shift officer. Radio and equipment were found fully charged and available for my daily activity shift report. Book
Mar 13, 2018 12:10 PM <b>193742865 (S3)</b>	Jeff Anderson - (S) Patrol Parking Lot East - Officer patrolled the East parking lot looking for signs of theft, vandalism, unauthorized vendor flyers, raised curbs and broken curb stops in the customer parking area. Book
Mar 13, 2018 12:11 PM <b>193742962 (S3)</b>	Jeff Anderson - (S) Patrol Parking Lot North - Officer patrolled the North parking lot looking for signs of theft, vandalism, unauthorized vendor flyers, raised curbs and broken curb stops in the customer parking area. Book
Mar 13, 2018 12:11 PM <b>193743041 (S2)</b>	Jeff Anderson - (S) Positive Contact - Starbucks NOTE: Contacted Chris Smith, store manager of Starbucks coffee. No problems to report inside the store and patio area outside. See attached photo.
Mar 13, 2018 12:13 PM <b>193743158 (S3)</b>	Jeff Anderson - (S) Patrol Parking Lot West - Officer patrolled the West parking lot looking for signs of theft, vandalism, unauthorized vendor flyers, raised curbs and broken curb stops in the customer parking area.
Mar 13, 2018 12:14 PM <b>193743275 (S3)</b>	Jeff Anderson - (S) Patrol Loading Dock Area - Officer patrolled the loading dock and and checked the commercial vehicles parked at the ramp location. No safety or storage items found at the loading dock area. No vehicles obstructing truck access, or unauthorized trespassing.
Mar 13, 2018 12:15 PM <b>193743391 (S1)</b>	Jeff Anderson - (S) Vandalism (Graffiti) Disposal Area NOTE: Graffiti located in the rear property near the loading zone area. The large cardboard trash compactor was damaged using black spray cans found at this location. Maintenance report submitted to area supervisor and property management team.
Mar 13, 2018 12:17 PM <b>193743569 (S3)</b>	Jeff Anderson - (S) Patrol Outside Perimeter Conducted a physical exterior inspection of the outside perimeter area. Checked the fences, walls, and barrier locations for any signs of obstruction or debris in pathways. No unusual activity or vandalism to report at this time.
Mar 13, 2018 12:17 PM <b>193743644 (S3)</b>	Jeff Anderson - (S) Patrol Merchant Store Front - Officer conducted a walk through the front area of the tenant spaces and merchant stores. No obstructions or persons loitering during the inspection tour. No visible signs of property damage or vandalism.
Mar 13, 2018 12:19 PM <b>193743802 (S2)</b>	Jeff Anderson - (S) Lighting Inspection Completed - Officer conducted a lighting inspection at the storefronts and the parking lot area to make sure lighting is in good condition and working properly. No visible signs of light damage or vandalism during this inspection.
Mar 13, 2018 12:21 PM <b>193744918 (S3)</b>	Jeff Anderson - (S) Patrol Parking Lot South - Officer patrolled the South parking lot looking for signs of theft, vandalism, unauthorized vendor flyers, raised curbs and broken curb stops in the customer parking area.
Mar 13, 2018 12:36 PM <b>193745638 (M1)</b>	Jeff Anderson - (M) Water Leak - Parking Garage NOTE: Water 5 ft in length found in Center of parking garage. Contacted maintenance team Frank Brown for assistance. Area was secured and coned off for safety and liability. See Attached Photo.
Mar 13, 2018 12:41 PM <b>193744918 (S3)</b>	Jeff Anderson - (S) Patrol Parking Lot South - Officer patrolled the South parking lot looking for signs of theft, vandalism, unauthorized vendor flyers, raised curbs and broken curb stops in the customer parking area.

Level

1

2

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Report Run: Apr 03, 2018 11:18 AM

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# Security Report

#193752048

Silvertrac Software

## Issue Type

Property Damage Report

## Status

Closed

## Property

Commercial Property  
5412 Beach Boulevard  
Long Beach, CA 90808

## Location

Curb

## Reported By

Officer Jake Smith  
(623) 452-2323

## Issue Timeline

Created	Tue 03/13/18 01:39 PM	JAKE SMITH
Assigned To	Tue 03/13/18 01:39 PM	JAKE SMITH
Acknowledged	Tue 03/13/18 01:39 PM	JAKE SMITH
Arrived At	Tue 03/13/18 01:39 PM	JAKE SMITH
Closed	Tue 03/13/18 02:17 PM	SUP. ERIKSON

## Additional Details

Assigned By	JAKE SMITH
Reported Address	5412 Beach Boulevard

## Notes

Tue 3/13/2018 1:47 PM - JAKE SMITH

Southern counties driver MH - 52 Salvador Santos License Plate 9F09542. Large White Ford Semi Truck caused property damage to median and landscape. Located at main entrance off of Carson St. Contacted property maintenance team for clean up and evaluation of damage. Property manager notified at 1:50 PM.

Tue 3/13/2018 1:42 PM - JAKE SMITH



Report Run 3/14/2018 11:52:24 AM Page 1 of 1

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## Checkpoints Timeline Report

Start: Feb 24, 2018 09:53 AM

End: Feb 25, 2018 09:53 AM

Sample Company Name

Property: Commercial Property

Unique Checkpoints: 18 / 18

Avg. Interval: 0hr 6min

Total Scans: 216

Checkpoint Name	Count	Checkpoint Name	Count	Checkpoint Name	Count
Carl's Junior Exterior	12	Nail Salon Exterior	12	Pay Less Shoes Exterior	12
Chase Bank Exterior	13	Panda Express Exterior	13	TriCare Exterior	13
Costco Entrance	12	Parking Lot Zone 1	12	Wal-Mart Delivery Alley	15
Costco Gas Station	12	Parking Lot Zone 2	6	Wal-Mart Entrance	15
Costco Loading Dock	11	Parking Lot Zone 3	6	Wal-Mart Garden Center	16
Tire Center Exterior	12	Parking Lot Zone 4	8	Wal-Mart Loading Dock	16

Time	Checkpoint Name	User Name	Difference
Tue Feb 24, 2018 10:03 AM	Costco Entrance	Jeff Anderson	0hr 10min
Tue Feb 24, 2018 10:11 AM	Costco Loading Dock	Jeff Anderson	0hr 8min
Tue Feb 24, 2018 10:17 AM	Costco Gas Station	Jeff Anderson	0hr 6min
Tue Feb 24, 2018 10:24 AM	Tire Center Exterior	Jeff Anderson	0hr 7min
Tue Feb 24, 2018 10:26 AM	Panda Express Exterior	Jeff Anderson	0hr 2min
Tue Feb 24, 2018 10:29 AM	Parking Lot Zone 1	Jeff Anderson	0hr 3min
Tue Feb 24, 2018 10:31 AM	Parking Lot Zone 2	Jeff Anderson	0hr 2min
Tue Feb 24, 2018 10:36 AM	Parking Lot Zone 3	Jeff Anderson	0hr 5min
Tue Feb 24, 2018 10:46 AM	TriCare Exterior	Jeff Anderson	0hr 10min
Tue Feb 24, 2018 10:47 AM	Wal-Mart Entrance	Jeff Anderson	0hr 1min
Tue Feb 24, 2018 11:04 AM	Wal-Mart Garden Center	Jeff Anderson	0hr 17min
<b>Tue Feb 24, 2018 11:43 AM</b>	<b>Costco Entrance</b>	<b>Jeff Anderson</b>	<b>0hr 39min</b>
Tue Feb 24, 2018 11:44 AM	Costco Loading Dock	Jeff Anderson	0hr 1min
Tue Feb 24, 2018 11:47 AM	Costco Gas Station	Jeff Anderson	0hr 3min
Tue Feb 24, 2018 11:49 AM	Tire Center Exterior	Jeff Anderson	0hr 2min
Tue Feb 24, 2018 11:50 AM	Panda Express Exterior	Jeff Anderson	0hr 0min
Tue Feb 24, 2018 11:51 AM	Parking Lot Zone 1	Jeff Anderson	0hr 1min
Tue Feb 24, 2018 12:08 PM	Parking Lot Zone 3	Jeff Anderson	0hr 17min
Tue Feb 24, 2018 12:10 PM	TriCare Exterior	Jeff Anderson	0hr 2min
Tue Feb 24, 2018 12:18 PM	Wal-Mart Garden Center	Jeff Anderson	0hr 8min
Tue Feb 24, 2018 12:24 PM	Wal-Mart Entrance	Jeff Anderson	0hr 6min
<b>Tue Feb 24, 2018 12:59 PM</b>	<b>Costco Entrance</b>	<b>Jeff Anderson</b>	<b>0hr 35min</b>
Tue Feb 24, 2018 01:00 PM	Costco Loading Dock	Jeff Anderson	0hr 1min
Tue Feb 24, 2018 01:03 PM	Costco Gas Station	Jeff Anderson	0hr 2min

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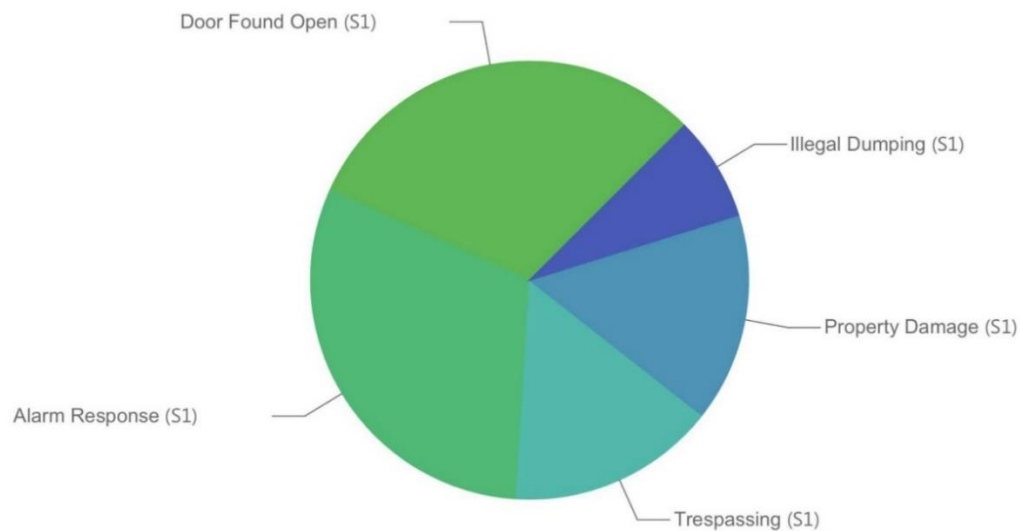
## Security Summary Report

Commercial Property

Start: Jan 01, 2018 04:43 PM

End: Feb 28, 2018 04:43 PM

Issue Type	Total	Comp	Pend	Issue Type	Total	Comp	Pend	Issue Type	Total	Comp
Alarm Response (S1)	4	4	0	Tour: Carl's Junior Exterior (S3)	560	560	0	Officer On Site (S3)	18	18
Alarm Malfunction (S1)	3	3	0	Tour: Chase Bank Exterior (S3)	439	439	0	Officer Off Site (S3)	16	16
Disturbance (S1)	8	8	0	Tour: Costco Entrance (S3)	417	417	0	Officer On Break (S3)	15	15
Door Found Open (S1)	9	9	0	Tour: Costco Gas Station (S3)	403	403	0	Supervisor on Site (S3)	10	10
Door/Window Damage (S2)	5	5	0	Tour: Costco Loading Dock (S3)	395	395	0	Pass Down Received (S3)	8	8
Fire Extinguisher Issue (S1)	2	2	0	Tour: Tire Center Exterior (S3)	347	347	0			
Graffiti (S1)	5	5	0	Tour: Nail Salon Exterior (S3)	561	561	0			
Illegal Dumping (S1)	10	10	0	Tour: Panda Express Exterior (S3)	479	479	0			
Lighting Inspection (S2)	12	12	0	Tour: Parking Lot Zone 1 (S3)	477	477	0			
Lighting Issue (S2)	7	7	0	Tour: Parking Lot Zone 2 (S3)	403	403	0			
Positive Contact (Merchant) (S2)	23	23	0	Tour: Parking Lot Zone 3 (S3)	395	395	0			
Positive Contact (Customer) (S2)	36	36	0	Tour: Parking Lot Zone 4 (S3)	347	347	0			
Property Damage (S1)	13	13	0	Tour: Pay Less Shoes Exterior (S3)	303	303	0			
Skateboarding On Site (S2)	4	4	0	Tour: TriCare Exterior (S3)	297	297	0			
Solicitors/Flyers Warned (S2)	6	6	0	Tour: TriCare Parking Lot (S3)	295	295	0			
Slip/Trip/Fall Hazard (S2)	1	1	0	Tour: Wal-Mart Delivery Alley (S3)	291	291	0			
Stray Animals (S2)	4	4	0	Tour: Wal-Mart Entrance (S3)	250	250	0			
Theft (S1)	9	9	0	Tour: Wal-Mart Garden Center (S3)	224	224	0			
Trespassing (S2)	3	3	0	Tour: Wal-Mart Loading Dock (S3)	206	206	0			



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Report Run: Feb 28, 2018 04:44 PM

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# SUNSTATES SECURITY



**SUNSTATES  
SECURITY**

Sunstates Security  
801 Corporate Center Drive  
Suite 300  
Raleigh, NC 27607

919-398-6445 (phone)  
866-710-2019 (toll free)

[www.sunstatessecurity.com](http://www.sunstatessecurity.com)



**CITY OF FORT LAUDERDALE  
GENERAL CONDITIONS**

These instructions and conditions are standard for all contracts for commodities or services issued through the City of Fort Lauderdale Procurement Services Division. The City may delete, supersede, or modify any of these standard instructions for a particular contract by indicating such change in the Invitation to Bid (ITB) Special Conditions, Technical Specifications, Instructions, Proposal Pages, Addenda, and Legal Advertisement. In this general conditions document, Invitation to Bid (ITB), Request for Qualifications (RFQ), and Request for Proposal (RFP) are interchangeable.

**PART I BIDDER PROPOSAL PAGE(S) CONDITIONS:**

- 1.01 BIDDER ADDRESS:** The City maintains automated vendor address lists that have been generated for each specific Commodity Class item through our bid issuing service, BidSync. Notices of Invitations to Bid (ITB'S) are sent by e-mail to the selection of bidders who have fully registered with BidSync or faxed (if applicable) to every vendor on those lists, who may then view the bid documents online. Bidders who have been informed of a bid's availability in any other manner are responsible for registering with BidSync in order to view the bid documents. There is no fee for doing so. If you wish bid notifications be provided to another e-mail address or fax, please contact BidSync. If you wish purchase orders sent to a different address, please so indicate in your bid response. If you wish payments sent to a different address, please so indicate on your invoice.
- 1.02 DELIVERY:** Time will be of the essence for any orders placed as a result of this ITB. The City reserves the right to cancel any orders, or part thereof, without obligation if delivery is not made in accordance with the schedule specified by the Bidder and accepted by the City.
- 1.03 PACKING SLIPS:** It will be the responsibility of the awarded Contractor, to attach all packing slips to the OUTSIDE of each shipment. Packing slips must provide a detailed description of what is to be received and reference the City of Fort Lauderdale purchase order number that is associated with the shipment. Failure to provide a detailed packing slip attached to the outside of shipment may result in refusal of shipment at Contractor's expense.
- 1.04 PAYMENT TERMS AND CASH DISCOUNTS:** Payment terms, unless otherwise stated in this ITB, will be considered to be net 45 days after the date of satisfactory delivery at the place of acceptance and receipt of correct invoice at the office specified, whichever occurs last. Bidder may offer cash discounts for prompt payment but they will not be considered in determination of award. If a Bidder offers a discount, it is understood that the discount time will be computed from the date of satisfactory delivery, at the place of acceptance, and receipt of correct invoice, at the office specified, whichever occurs last.
- 1.05 TOTAL BID DISCOUNT:** If Bidder offers a discount for award of all items listed in the bid, such discount shall be deducted from the total of the firm net unit prices bid and shall be considered in tabulation and award of bid.
- 1.06 BIDS FIRM FOR ACCEPTANCE:** Bidder warrants, by virtue of bidding, that the bid and the prices quoted in the bid will be firm for acceptance by the City for a period of one hundred twenty (120) days from the date of bid opening unless otherwise stated in the ITB.
- 1.07 VARIANCES:** For purposes of bid evaluation, Bidder's must indicate any variances, no matter how slight, from ITB General Conditions, Special Conditions, Specifications or Addenda in the space provided in the ITB. No variations or exceptions by a Bidder will be considered or deemed a part of the bid submitted unless such variances or exceptions are listed in the bid and referenced in the space provided on the bidder proposal pages. If variances are not stated, or referenced as required, it will be assumed that the product or service fully complies with the City's terms, conditions, and specifications.
- By receiving a bid, City does not necessarily accept any variances contained in the bid. All variances submitted are subject to review and approval by the City. If any bid contains material variances that, in the City's sole opinion, make that bid conditional in nature, the City reserves the right to reject the bid or part of the bid that is declared by the City as conditional.
- 1.08 NO BIDS:** If you do not intend to bid please indicate the reason, such as insufficient time to respond, do not offer product or service, unable to meet specifications, schedule would not permit, or any other reason, in the space provided in this ITB. Failure to bid or return no bid comments prior to the bid due and opening date and time, indicated in this ITB, may result in your firm being deleted from our Bidder's registration list for the Commodity Class Item requested in this ITB.
- 1.09 MINORITY AND WOMEN BUSINESS ENTERPRISE PARTICIPATION AND BUSINESS DEFINITIONS:** The City of Fort Lauderdale wants to increase the participation of Minority Business Enterprises (MBE), Women Business Enterprises (WBE), and Small Business Enterprises (SBE) in its procurement activities. If your firm qualifies in accordance with the below definitions please indicate in the space provided in this ITB.

Minority Business Enterprise (MBE) "A Minority Business" is a business enterprise that is owned or controlled by one or more socially or economically disadvantaged persons. Such disadvantage may arise from cultural, racial, chronic economic circumstances or background or other similar cause. Such persons include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

The term "Minority Business Enterprise" means a business at least 51 percent of which is owned by minority group members or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by minority group members. For the purpose of the preceding sentence, minority group members are citizens of the United States who include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

Women Business Enterprise (WBE) a "Women Owned or Controlled Business" is a business enterprise at least 51 percent of which is owned by females or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by females.

Small Business Enterprise (SBE) "Small Business" means a corporation, partnership, sole proprietorship, or other legal entity formed for the purpose of making a profit, which is independently owned and operated, has either fewer than 100 employees or less than \$1,000,000 in annual gross receipts.

BLACK, which includes persons having origins in any of the Black racial groups of Africa.

WHITE, which includes persons whose origins are Anglo-Saxon and Europeans and persons of Indo-European decent including Pakistani and East Indian.

HISPANIC, which includes persons of Mexican, Puerto Rican, Cuban, Central and South American, or other Spanish culture or origin, regardless of race.

NATIVE AMERICAN, which includes persons whose origins are American Indians, Eskimos, Aleuts, or Native Hawaiians.

ASIAN AMERICAN, which includes persons having origin in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands.

#### 1.10 MINORITY-WOMEN BUSINESS ENTERPRISE PARTICIPATION

It is the desire of the City of Fort Lauderdale to increase the participation of minority (MBE) and women-owned (WBE) businesses in its contracting and procurement programs. While the City does not have any preference or set aside programs in place, it is committed to a policy of equitable participation for these firms. Proposers are requested to include in their proposals a narrative describing their past accomplishments and intended actions in this area. If proposers are considering minority or women owned enterprise participation in their proposal, those firms, and their specific duties have to be identified in the proposal. If a proposer is considered for award, he or she will be asked to meet with City staff so that the intended MBE/WBE participation can be formalized and included in the subsequent contract.

#### 1.11 SCRUTINIZED COMPANIES

As to any contract for goods or services of \$1 million or more and as to the renewal of any contract for goods or services of \$1 million or more, subject to *Odebrecht Construction, Inc., v. Prasad*, 876 F.Supp.2d 1305 (S.D. Fla. 2012), affirmed, *Odebrecht Construction, Inc., v. Secretary, Florida Department of Transportation*, 715 F.3d 1268 (11th Cir. 2013), with regard to the "Cuba Amendment," the Contractor certifies that it is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and that it does not have business operations in Cuba or Syria, as provided in section 287.135, Florida Statutes (2019), as may be amended or revised. As to any contract for goods or services of any amount and as to the renewal of any contract for goods or services of any amount, the Contractor certifies that it is not on the Scrutinized Companies that Boycott Israel List created pursuant to Section 215.4725, Florida Statutes (2019), and that it is not engaged in a boycott of Israel. The City may terminate this Agreement at the City's option if the Contractor is found to have submitted a false certification as provided under subsection (5) of section 287.135, Florida Statutes (2019), as may be amended or revised, or been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or the Scrutinized Companies that Boycott Israel List created pursuant to Section 215.4725, Florida Statutes (2019), or is engaged in a boycott of Israel, or has been engaged in business operations in Cuba or Syria, as defined in Section 287.135, Florida Statutes (2019), as may be amended or revised.

Rev. 2/2020

Page 1

#### 1.12 DEBARRED OR SUSPENDED BIDDERS OR PROPOSERS

The bidder or proposer certifies, by submission of a response to this solicitation, that neither it nor its principals and subcontractors are presently debarred or suspended by any Federal department or agency.

#### Part II DEFINITIONS/ORDER OF PRECEDENCE:

#### 2.01 **BIDDING DEFINITIONS** The City will use the following definitions in its general conditions, special conditions, technical specifications, instructions to bidders, addenda and any other document used in the bidding process:

INVITATION TO BID (ITB) The solicitation document used for soliciting competitive sealed bids for goods or services.

INVITATION TO NEGOTIATE (ITN) All solicitation documents, regardless of medium, whether attached to or incorporated by reference in solicitations for responses from firms that invite proposals from interested and qualified firms so the city may enter into negotiations with the firm(s) determined most capable of providing the required goods or services.

REQUEST FOR PROPOSALS (RFP) A solicitation method used for soliciting competitive sealed proposals to determine the best value among proposals for goods or services for which price may not be the prevailing factor in award of the contract, or the scope of work, specifications or contract terms and conditions may be difficult to define. Such solicitation will consider the qualifications of the proposers along with evaluation of each proposal using identified and generally weighted evaluation criteria. RFPs may include price criteria whenever feasible, at the discretion of the city.

REQUEST FOR QUALIFICATIONS (RFQ) A solicitation method used for requesting statements of qualifications in order to determine the most qualified proposer for professional services.

BID – a price and terms quote received in response to an ITB.

PROPOSAL – a proposal received in response to an RFP.

BIDDER – Person or firm submitting a Bid.

PROPOSER – Person or firm submitting a Proposal.

RESPONSIVE BIDDER – A firm who has submitted a bid, offer, quote, or response which conforms in all material respects to the competitive solicitation document and all of its requirements.

RESPONSIBLE BIDDER – A firm who is fully capable of meeting all requirements of the solicitation and subsequent contract. The respondent must possess the full capability, including financial and technical, ability, business judgment, experience, qualifications, facilities, equipment, integrity, capability, and reliability, in all respects to perform fully the contract requirements and assure good faith performance as determined by the city.

FIRST RANKED PROPOSER – That Proposer, responding to a City RFP, whose Proposal is deemed by the City, the most advantageous to the City after applying the evaluation criteria contained in the RFP.

SELLER – Successful Bidder or Proposer who is awarded a Purchase Order or Contract to provide goods or services to the City.

CONTRACTOR – Any firm having a contract with the city. Also referred to as a "Vendor".

CONTRACT – All types of agreements, including purchase orders, for procurement of supplies, services, and construction, regardless of what these agreements may be called.

CONSULTANT – A firm providing professional services for the city.

- 2.02 SPECIAL CONDITIONS:** Any and all Special Conditions contained in this ITB that may be in variance or conflict with these General Conditions shall have precedence over these General Conditions. If no changes or deletions to General Conditions are made in the Special Conditions, then the General Conditions shall prevail in their entirety,

**PART III BIDDING AND AWARD PROCEDURES:**

- 3.01 SUBMISSION AND RECEIPT OF BIDS:** To receive consideration, bids must be received prior to the bid opening date and time. Unless otherwise specified, Bidders should use the proposal forms provided by the City. These forms may be duplicated, but failure to use the forms may cause the bid to be rejected. Any erasures or corrections on the bid must be made in ink and initialed by Bidder in ink. All information submitted by the Bidder shall be printed, typewritten or filled in with pen and ink. Bids shall be signed in ink. Separate bids must be submitted for each ITB issued by the City in separate sealed envelopes properly marked. When a particular ITB or RFP requires multiple copies of bids or proposals they may be included in a single envelope or package properly sealed and identified. Only send bids via facsimile transmission (FAX) if the ITB specifically states that bids sent via FAX will be considered. If such a statement is not included in the ITB, bids sent via FAX will be rejected. Bids will be publicly opened in the Procurement Office, or other designated area, in the presence of Bidders, the public, and City staff. Bidders and the public are invited and encouraged to attend bid openings. Bids will be tabulated and made available for review by Bidder's and the public in accordance with applicable regulations.
- 3.02 MODEL NUMBER CORRECTIONS:** If the model number for the make specified in this ITB is incorrect, or no longer available and replaced with an updated model with new specifications, the Bidder shall enter the correct model number on the bidder proposal page. In the case of an updated model with new specifications, Bidder shall provide adequate information to allow the City to determine if the model bid meets the City's requirements.
- 3.03 PRICES QUOTED:** Deduct trade discounts, and quote firm net prices. Give both unit price and extended total. In the case of a discrepancy in computing the amount of the bid, the unit price quoted will govern. All prices quoted shall be F.O.B. destination, freight prepaid (Bidder pays and bears freight charges, Bidder owns goods in transit and files any claims), unless otherwise stated in Special Conditions. Each item must be bid separately. No attempt shall be made to tie any item or items contained in the ITB with any other business with the City.
- 3.04 TAXES:** The City of Fort Lauderdale is exempt from Federal Excise and Florida Sales taxes on direct purchase of tangible property. Exemption **number for EIN is 59-6000319, and State Sales tax exemption number is 85-8013875578C-1.**
- 3.05 WARRANTIES OF USAGE:** Any quantities listed in this ITB as estimated or projected are provided for tabulation and information purposes only. No warranty or guarantee of quantities is given or implied. It is understood that the Contractor will furnish the City's needs as they arise.
- 3.06 APPROVED EQUAL:** When the technical specifications call for a brand name, manufacturer, make, model, or vendor catalog number with acceptance of APPROVED EQUAL, it shall be for the purpose of establishing a level of quality and features desired and acceptable to the City. In such cases, the City will be receptive to any unit that would be considered by qualified City personnel as an approved equal. In that the specified make and model represent a level of quality and features desired by the City, the Bidder must state clearly in the bid any variance from those specifications. It is the Bidder's responsibility to provide adequate information, in the bid, to enable the City to ensure that the bid meets the required criteria. If adequate information is not submitted with the bid, it may be rejected. The City will be the sole judge in determining if the item bid qualifies as an approved equal.
- 3.07 MINIMUM AND MANDATORY TECHNICAL SPECIFICATIONS:** The technical specifications may include items that are considered minimum, mandatory, or required. If any Bidder is unable to meet or exceed these items, and feels that the technical specifications are overly restrictive, the bidder must notify the Procurement Services Division immediately. Such notification must be received by the Procurement Services Division prior to the deadline contained in the ITB, for questions of a material nature, or prior to five (5) days before bid due and open date, whichever occurs first. If no such notification is received prior to that deadline, the City will consider the technical specifications to be acceptable to all bidders.
- 3.08 MISTAKES:** Bidders are cautioned to examine all terms, conditions, specifications, drawings, exhibits, addenda, delivery instructions and special conditions pertaining to the ITB. Failure of the Bidder to examine all pertinent documents shall not entitle the bidder to any relief from the conditions imposed in the contract.
- 3.09 SAMPLES AND DEMONSTRATIONS:** Samples or inspection of product may be requested to determine suitability. Unless otherwise specified in Special Conditions, samples shall be requested after the date of bid opening, and if requested should be received by the City within seven (7) working days of request. Samples, when requested, must be furnished free of expense to the City and if not used in testing or destroyed, will upon request of the Bidder, be returned within thirty (30) days of bid award at Bidder's expense. When required, the City may request full demonstrations of units prior to award. When such demonstrations are requested, the Bidder shall respond promptly and arrange a demonstration at a convenient location. Failure to provide samples or demonstrations as specified by the City may result in rejection of a bid.
- 3.10 LIFE CYCLE COSTING:** If so specified in the ITB, the City may elect to evaluate equipment proposed on the basis of total cost of ownership. In using Life Cycle Costing, factors such as the following may be considered: estimated useful life, maintenance costs, cost of supplies, labor intensity, energy usage, environmental impact, and residual value. The City reserves the right to use those or other applicable criteria, in its sole opinion that will most accurately estimate total cost of use and ownership.
- 3.11 BIDDING ITEMS WITH RECYCLED CONTENT:** In addressing environmental concerns, the City of Fort Lauderdale encourages Bidders to submit bids or alternate bids containing items with recycled content. When submitting bids containing items with recycled content, Bidder shall provide documentation adequate for the City to verify the recycled content. The City prefers packaging consisting of materials that are degradable or able to be recycled. When specifically stated in the ITB, the City may give preference to bids containing items manufactured with recycled material or packaging that is able to be recycled.

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- 3.12 USE OF OTHER GOVERNMENTAL CONTRACTS:** The City reserves the right to reject any part or all of any bids received and utilize other available governmental contracts, if such action is in its best interest.
- 3.13 QUALIFICATIONS/INSPECTION:** Bids will only be considered from firms normally engaged in providing the types of commodities/services specified herein. The City reserves the right to inspect the Bidder's facilities, equipment, personnel, and organization at any time, or to take any other action necessary to determine Bidder's ability to perform. The Procurement Director reserves the right to reject bids where evidence or evaluation is determined to indicate inability to perform.
- 3.14 BID SURETY:** If Special Conditions require a bid security, it shall be submitted in the amount stated. A bid security can be in the form of a bid bond or cashier's check. Bid security will be returned to the unsuccessful bidders as soon as practicable after opening of bids. Bid security will be returned to the successful bidder after acceptance of the performance bond, if required; acceptance of insurance coverage, if required; and full execution of contract documents, if required; or conditions as stated in Special Conditions.
- 3.15 PUBLIC RECORDS/TRADE SECRETS/COPYRIGHT:** The Proposer's response to the RFP is a public record pursuant to Florida law, which is subject to disclosure by the City under the State of Florida Public Records Law, Florida Statutes Chapter 119.07 ("Public Records Law"). The City shall permit public access to all documents, papers, letters or other material submitted in connection with this RFP and the Contract to be executed for this RFP, subject to the provisions of Chapter 119.07 of the Florida Statutes.

Any language contained in the Proposer's response to the RFP purporting to require confidentiality of any portion of the Proposer's response to the RFP, except to the extent that certain information is in the City's opinion a Trade Secret pursuant to Florida law, shall be void. If a Proposer submits any documents or other information to the City which the Proposer claims is Trade Secret information and exempt from Florida Statutes Chapter 119.07 ("Public Records Laws"), the Proposer shall clearly designate that it is a Trade Secret and that it is asserting that the document or information is exempt. The Proposer must specifically identify the exemption being claimed under Florida Statutes 119.07. The City shall be the final arbiter of whether any information contained in the Proposer's response to the RFP constitutes a Trade Secret. The city's determination of whether an exemption applies shall be final, and the proposer agrees to defend, indemnify, and hold harmless the City and the City's officers, employees, and agents, against any loss or damages incurred by any person or entity as a result of the City's treatment of records as public records. In addition, the proposer agrees to defend, indemnify, and hold harmless the City and the City's officers, employees, and agents, against any loss or damages incurred by any person or entity as a result of the City's treatment of records as exempt from disclosure or confidential. Proposals bearing copyright symbols or otherwise purporting to be subject to copyright protection in full or in part may be rejected. The proposer authorizes the City to publish, copy, and reproduce any and all documents submitted to the City bearing copyright symbols or otherwise purporting to be subject to copyright protection.

EXCEPT FOR CLEARLY MARKED PORTIONS THAT ARE BONA FIDE TRADE SECRETS PURSUANT TO FLORIDA LAW, DO NOT MARK YOUR RESPONSE TO THE RFP AS PROPRIETARY OR CONFIDENTIAL. DO NOT MARK YOUR RESPONSE TO THE RFP OR ANY PART THEREOF AS COPYRIGHTED.

- 3.16 PROHIBITION OF INTEREST:** No contract will be awarded to a bidding firm who has City elected officials, officers or employees affiliated with it, unless the bidding firm has fully complied with current Florida State Statutes and City Ordinances relating to this issue. Bidders must disclose any such affiliation. Failure to disclose any such affiliation will result in disqualification of the Bidder and removal of the Bidder from the City's bidder lists and prohibition from engaging in any business with the City.
- 3.17 RESERVATIONS FOR AWARD AND REJECTION OF BIDS:** The City reserves the right to accept or reject any or all bids, part of bids, and to waive minor irregularities or variations to specifications contained in bids, and minor irregularities in the bidding process. The City also reserves the right to award the contract on a split order basis, lump sum basis, individual item basis, or such combination as shall best serve the interest of the City. The City reserves the right to make an award to the responsive and responsible bidder whose product or service meets the terms, conditions, and specifications of the ITB and whose bid is considered to best serve the City's interest. In determining the responsiveness of the offer and the responsibility of the Bidder, the following shall be considered when applicable: the ability, capacity and skill of the Bidder to perform as required; whether the Bidder can perform promptly, or within the time specified, without delay or interference; the character, integrity, reputation, judgment, experience and efficiency of the Bidder; the quality of past performance by the Bidder; the previous and existing compliance by the Bidder with related laws and ordinances; the sufficiency of the Bidder's financial resources; the availability, quality and adaptability of the Bidder's supplies or services to the required use; the ability of the Bidder to provide future maintenance, service or parts; the number and scope of conditions attached to the bid.
- If the ITB provides for a contract trial period, the City reserves the right, in the event the selected bidder does not perform satisfactorily, to award a trial period to the next ranked bidder or to award a contract to the next ranked bidder, if that bidder has successfully provided services to the City in the past. This procedure to continue until a bidder is selected or the contract is re-bid, at the sole option of the City.
- 3.18 LEGAL REQUIREMENTS:** Applicable provisions of all federal, state, county laws, and local ordinances, rules and regulations, shall govern development, submittal and evaluation of all bids received in response hereto and shall govern any and all claims and disputes which may arise between person(s) submitting a bid response hereto and the City by and through its officers, employees and authorized representatives, or any other person, natural or otherwise; and lack of knowledge by any bidder shall not constitute a cognizable defense against the legal effect thereof.
- 3.19 BID PROTEST PROCEDURE:** Any proposer or bidder who is not recommended for award of a contract and who alleges a failure by the city to follow the city's procurement ordinance or any applicable law may protest to the chief procurement officer, by delivering a letter of protest to the director of finance within five (5) days after a notice of intent to award is posted on the city's web site at the following url: <https://www.fortlauderdale.gov/departments/finance/procurement-services/notices-of-intent-to-award>

The complete protest ordinance may be found on the city's web site at the following url: [https://library.municode.com/fl/fort\\_lauderdale/codes/code\\_of\\_ordinances?nodeid=coor\\_ch2ad\\_artvfi\\_div2pr\\_s2-182direpr](https://library.municode.com/fl/fort_lauderdale/codes/code_of_ordinances?nodeid=coor_ch2ad_artvfi_div2pr_s2-182direpr)

#### **PART IV BONDS AND INSURANCE**

- 4.01 PERFORMANCE BOND:** If a performance bond is required in Special Conditions, the Contractor shall within fifteen (15) working days after notification of award, furnish to the City a Performance Bond, payable to the City of Fort Lauderdale, Florida, in the face amount specified in Special Conditions as surety for faithful

performance under the terms and conditions of the contract. If the bond is on an annual coverage basis, renewal for each succeeding year shall be submitted to the City thirty (30) days prior to the termination date of the existing Performance Bond. The Performance Bond must be executed by a surety company of recognized standing, authorized to do business in the State of Florida and having a resident agent.

Acknowledgement and agreement is given by both parties that the amount herein set for the Performance Bond is not intended to be nor shall be deemed to be in the nature of liquidated damages nor is it intended to limit the liability of the Contractor to the City in the event of a material breach of this Agreement by the Contractor.

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**4.02 INSURANCE:** The Contractor shall assume full responsibility and expense to obtain all necessary insurance as required by City or specified in Special Conditions.

The Contractor shall provide to the Procurement Services Division original certificates of coverage and receive notification of approval of those certificates by the City's Risk Manager prior to engaging in any activities under this contract. The Contractor's insurance is subject to the approval of the City's Risk Manager. The certificates must list the City as an ADDITIONAL INSURED for General Liability Insurance and shall have no less than thirty (30) days written notice of cancellation or material change. Further modification of the insurance requirements may be made at the sole discretion of the City's Risk Manager if circumstances change or adequate protection of the City is not presented. Bidder, by submitting the bid, agrees to abide by such modifications.

**PART V PURCHASE ORDER AND CONTRACT TERMS:**

**5.01 COMPLIANCE WITH SPECIFICATIONS, LATE DELIVERIES/PENALTIES:** Items offered may be tested for compliance with bid specifications. Items delivered which do not conform to bid specifications may be rejected and returned at Contractor's expense. Any violation resulting in contract termination for cause or delivery of items not conforming to specifications, or late delivery may also result in:

- Bidder's name being removed from the City's bidder's mailing list for a specified period and Bidder will not be recommended for any award during that period.
- All City Departments being advised to refrain from doing business with the Bidder.
- All other remedies in law or equity.

**5.02 ACCEPTANCE, CONDITION, AND PACKAGING:** The material delivered in response to ITB award shall remain the property of the Seller until a physical inspection is made and the material accepted to the satisfaction of the City. The material must comply fully with the terms of the ITB, be of the required quality, new, and the latest model. All containers shall be suitable for storage and shipment by common carrier, and all prices shall include standard commercial packaging. The City will not accept substitutes of any kind. Any substitutes or material not meeting specifications will be returned at the Bidder's expense. Payment will be made only after City receipt and acceptance of materials or services.

**5.03 SAFETY STANDARDS:** All manufactured items and fabricated assemblies shall comply with applicable requirements of the Occupation Safety and Health Act of 1970 as amended.

**5.04 ASBESTOS STATEMENT:** All material supplied must be 100% asbestos free. Bidder, by virtue of bidding, certifies that if awarded any portion of the ITB the bidder will supply only material or equipment that is 100% asbestos free.

**5.05 OTHER GOVERNMENTAL ENTITIES:** If the Bidder is awarded a contract as a result of this ITB, the bidder may, if the bidder has sufficient capacity or quantities available, provide to other governmental agencies, so requesting, the products or services awarded in accordance with the terms and conditions of the ITB and resulting contract. Prices shall be F.O.B. delivered to the requesting agency.

**5.06 VERBAL INSTRUCTIONS PROCEDURE:** No negotiations, decisions, or actions shall be initiated or executed by the Contractor as a result of any discussions with any City employee. Only those communications which are in writing from an authorized City representative may be considered. Only written communications from Contractors, which are assigned by a person designated as authorized to bind the Contractor, will be recognized by the City as duly authorized expressions on behalf of Contractors.

**5.07 INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor under this Agreement. Personal services provided by the Proposer shall be by employees of the Contractor and subject to supervision by the Contractor, and not as officers, employees, or agents of the City. Personnel policies, tax responsibilities, social security, health insurance, employee benefits, procurement policies unless otherwise stated in this ITB, and other similar administrative procedures applicable to services rendered under this contract shall be those of the Contractor.

**5.08 INDEMNITY/HOLD HARMLESS AGREEMENT:** Contractor shall protect and defend at Contractor's expense, counsel being subject to the City's approval, and indemnify and hold harmless the City and the City's officers, employees, volunteers, and agents from and against any and all losses, penalties, fines, damages, settlements, judgments, claims, costs, charges, expenses, or liabilities, including any award of attorney fees and any award of costs, in connection with or arising directly or indirectly out of any act or omission by the Contractor or by any officer, employee, agent, invitee, subcontractor, or sublicensee of the Contractor. Without limiting the foregoing, any and all such claims, suits, or other actions relating to personal injury, death, damage to property, defects in materials or workmanship, actual or alleged violations of any applicable statute, ordinance, administrative order, rule or regulation, or decree of any court shall be included in the indemnity hereunder.

**5.09 TERMINATION FOR CAUSE:** If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if the Contractor shall violate any of the provisions of this Agreement, the City may upon written notice to the Contractor terminate the right of the Contractor to proceed under this Agreement, or with such part or parts of the Agreement as to which there has been default, and may hold the Contractor liable for any damages caused to the City by reason of such default and termination. In the event of such termination, any completed services performed by the Contractor under this Agreement shall, at the option of the City, become the City's property and the Contractor shall be entitled to receive equitable compensation for any work completed to the satisfaction of

the City. The Contractor, however, shall not be relieved of liability to the City for damages sustained by the City by reason of any breach of the Agreement by the Contractor, and the City may withhold any payments to the Contractor for the purpose of setoff until such time as the amount of damages due to the City from the Contractor can be determined.

- 5.10 TERMINATION FOR CONVENIENCE:** The City reserves the right, in the City's best interest as determined by the City, to cancel any contract by giving written notice to the Contractor thirty (30) days prior to the effective date of such cancellation.
- 5.11 CANCELLATION FOR UNAPPROPRIATED FUNDS:** The obligation of the City for payment to a Contractor is limited to the availability of funds appropriated in a current fiscal period, and continuation of the contract into a subsequent fiscal period is subject to appropriation of funds, unless otherwise authorized by law.
- 5.12 RECORDS/AUDIT:** The Contractor shall maintain during the term of the contract all books of account, reports and records in accordance with generally accepted accounting practices and standards for records directly related to this contract. The Contractor agrees to make available to the City Auditor or the City Auditor's designee, during normal business hours and in Broward, Miami-Dade or Palm Beach Counties, all books of account, reports, and records relating to this contract. The Contractor shall retain all books of account, reports, and records relating to this contract for the duration of the contract and for three years after the final payment under this Agreement, until all pending audits, investigations or litigation matters relating to the contract are closed, or until expiration of the records retention period prescribed by Florida law or the records retention schedules adopted by the Division of Library and Information Services of the Florida Department of State, whichever is later.
- 5.13 PERMITS, TAXES, LICENSES:** The successful Contractor shall, at his/her/its own expense, obtain all necessary permits, pay all licenses, fees and taxes, required to comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried out under this contract.
- 5.14 LAWS/ORDINANCES:** The Contractor shall observe and comply with all Federal, state, local and municipal laws, ordinances rules and regulations that would apply to this contract.

**NON-DISCRIMINATION:** The Contractor shall not, in any of its activities, including employment, discriminate against any individual on the basis of race, color, national origin, age, religion, creed, sex, disability, sexual orientation, gender, gender identity, gender expression, marital status, or any other protected classification as defined by applicable law.

1. The Contractor certifies and represents that the Contractor will comply with Section 2-187, Code of Ordinances of the City of Fort Lauderdale, Florida, (2019), as may be amended or revised, ("Section 2-187"), during the entire term of this Agreement.
2. The failure of the Contractor to comply with Section 2-187 shall be deemed to be a material breach of this Agreement, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.
3. The City may terminate this Agreement if the Contractor fails to comply with Section 2-187.
4. The City may retain all monies due or to become due until the Contractor complies with Section 2-187.
5. The Contractor may be subject to debarment or suspension proceedings. Such proceedings will be consistent with the procedures in section 2-183 of the Code of Ordinances of the City of Fort Lauderdale, Florida.

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- 5.15 UNUSUAL CIRCUMSTANCES:** If during a contract term where costs to the City are to remain firm or adjustments are restricted by a percentage or CPI cap, unusual circumstances that could not have been foreseen by either party of the contract occur, and those circumstances significantly affect the Contractor's cost in providing the required prior items or services, then the Contractor may request adjustments to the costs to the City to reflect the changed circumstances. The circumstances must be beyond the control of the Contractor, and the requested adjustments must be fully documented. The City may, after examination, refuse to accept the adjusted costs if they are not properly documented, increases are considered to be excessive, or decreases are considered to be insufficient. In the event the City does not wish to accept the adjusted costs and the matter cannot be resolved to the satisfaction of the City, the City will reserve the following options:
1. The contract can be canceled by the City upon giving thirty (30) days written notice to the Contractor with no penalty to the City or Contractor. The Contractor shall fill all City requirements submitted to the Contractor until the termination date contained in the notice.
  2. The City requires the Contractor to continue to provide the items and services at the firm fixed (non-adjusted) cost until the termination of the contract term then in effect.
  3. If the City, in its interest and in its sole opinion, determines that the Contractor in a capricious manner attempted to use this section of the contract to relieve Contractor of a legitimate obligation under the contract, and no unusual circumstances had occurred, the City reserves the right to take any and all action under law or equity. Such action shall include, but not be limited to, declaring the Contractor in default and disqualifying Contractor from receiving any business from the City for a stated period of time.

If the City does agree to adjusted costs, these adjusted costs shall not be invoiced to the City until the Contractor receives notice in writing signed by a person authorized to bind the City in such matters.

- 5.16 ELIGIBILITY:** If applicable, the Contractor must first register with the Florida Department of State in accordance with Florida Statutes, prior to entering into a contract with the City.
- 5.17 PATENTS AND ROYALTIES:** The Contractor, without exception, shall defend, indemnify, and hold harmless the City and the City's employees, officers, employees, volunteers, and agents from and against liability of any nature and kind, including cost and expenses for or on account of any copyrighted, patented or un-patented invention, process, or article manufactured or used in the performance of the contract, including their use by the City. If the Contractor uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the bid prices shall include any and all royalties or costs arising from the use of such design, device, or materials in any way involved in the work.



- 5.18 ASSIGNMENT:** Contractor shall not transfer or assign the performance required by this ITB without the prior written consent of the City. Any award issued pursuant to this ITB, and the monies, which may become due hereunder, are not assignable except with the prior written approval of the City Commission or the City Manager or City Manager's designee, depending on original award approval.
- 5.19 GOVERNING LAW; VENUE:** The Contract shall be governed by and construed in accordance with the laws of the State of Florida. Venue for any lawsuit by either party against the other party or otherwise arising out of the Contract, and for any other legal proceeding, shall be in the courts in and for Broward County, Florida, or in the event of federal jurisdiction, in the Southern District of Florida.
- 5.20 PUBLIC RECORDS:**

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT PRRCONTRACT@FORTLAUDERDALE.GOV, 954-828-5002, CITY CLERK'S OFFICE, 100 N. ANDREWS AVENUE, FORT LAUDERDALE, FLORIDA 33301.**

Contractor shall comply with public records laws, and Contractor shall:

1. Keep and maintain public records required by the City to perform the service.
2. Upon request from the City's custodian of public records, provide the City with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes (2019), as may be amended or revised, or as otherwise provided by law.
3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the Contractor does not transfer the records to the City.
4. Upon completion of the Contract, transfer, at no cost, to the City all public records in possession of the Contractor or keep and maintain public records required by the City to perform the service. If the Contractor transfers all public records to the City upon completion of the Contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the City, upon request from the City's custodian of public records, in a format that is compatible with the information technology systems of the City.

**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.**

**Denis J. Kelly**  
Authorized Signature

**COO**  
Title

**Denis J. Kelly**  
Name (Printed)

**10-22-2020**  
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. 2-187(c), bidders must certify compliance with the Non-Discrimination provision of the ordinance.

The Contractor shall not, in any of his/her/its activities, including employment, discriminate against any individual on the basis of race, color, national origin, religion, creed, sex, disability, sexual orientation, gender, gender identity, gender expression, or marital status.

1. The Contractor certifies and represents that he/she/it will comply with Section 2-187, Code of Ordinances of the City of Fort Lauderdale, Florida, as amended by Ordinance C-18-33 (collectively, "Section 2-187").
2. The failure of the Contractor to comply with Section 2-187 shall be deemed to be a material breach of this Agreement, entitling the City to pursue any remedy stated below or any remedy provided under applicable law.
3. The City may terminate this Agreement if the Contractor fails to comply with Section 2-187.
4. The City may retain all monies due or to become due until the Contractor complies with Section 2-187.
5. The Contractor may be subject to debarment or suspension proceedings. Such proceedings will be consistent with the procedures in section 2-183 of the Code of Ordinances of the City of Fort Lauderdale, Florida.

**Carol Drumheller**  
Authorized Signature

**Carol Drumheller Sales and Marketing Coordinator**  
Print Name and Title

**10/22/2020**  
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 these credit cards 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

**SUNSTATES SECURITY LLC**

Company Name

**Carol Drumheller**

Name (Printed)

**10/22/2020**

Date

**Carol Drumheller**

Signature

**Sales & Marketing Coordinator**

Title

## 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 bid/proposal, 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](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 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 <b>Class A</b> 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 <u>and</u> 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) | <b>Sunstates Security, LLC</b><br>Business Name | is a <b>Class B</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 <u>or</u> 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 <b>Class C</b> 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 <b>Conditional Class A</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.   |
| (5) | Business Name                                   | requests a <b>Conditional Class B</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) | Business Name                                   | is considered a <b>Class D</b> 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: **Sunstates Security, LLC**

AUTHORIZED PERSON:	COMPANY	<b>Carol Drumheller</b>	<b>Sales and Marketing Coordinator</b>
		PRINTED NAME	TITLE
SIGNATURE:	<b>Carol Drumheller</b>	DATE:	<b>10/22/2020</b>

**E-VERIFY AFFIRMATION STATEMENT**

RFP/Bid /Contract No: **#12435-315**

Project Description: **Bid - Security Guard Services**

**City of Fort Lauderdale, FL**

**City Hall, Five Ash Regional Water Treatment Compound , Building Services**

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: **SUNSTATES SECURITY LLC**

Authorized Company Person's Signature: **Denis J. Kelly**

Authorized Company Person's Title: **COO**

Date: **10-22-2020**

9/15/2020



**BID/PROPOSAL CERTIFICATION**

**Please Note:** It is the sole responsibility of the bidder to ensure that his bid is submitted electronically through [www.BidSync.com](http://www.BidSync.com) 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) **SUNSTATES SECURITY LLC** EIN (Optional):

Address: **801 Corporate Center Drive, Suite 300**

City: **RALEIGH** State: **North Carolina** Zip: **27607**

Telephone No.: **9199871409** FAX No.: **919-398-6450** Email: **Carol Drumheller**

Delivery: Calendar days after receipt of Purchase Order (**section 1.02 of General Conditions**): **30**

Total Bid Discount (**section 1.05 of General Conditions**): **N/A**

Check box if your firm qualifies for MBE / SBE / WBE (**section 1.09 of General Conditions**): ☒

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

<u>Addendum No.</u>	<u>Date Issued</u>	<u>Addendum No.</u>	<u>Date Issued</u>	<u>Addendum No.</u>	<u>Date Issued</u>
<b>FPI Security 11772 Fully Execu.</b>	<b>10-09-2020</b>				

**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. **You must also click the "Take Exception" button.**

**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:

**Denis J. Kelly**  
Name (printed)

**10-22-2020**  
Date

**Denis J. Kelly**  
Signature

**COO**  
Title

Revised 4/28/2020